



ROMAN CATHOLIC  
DIOCESE OF ORANGE


# Project Siempre Adelante

**Next Phase of the 2018 Strategic Plan**



DECEMBER 12, 2023



A detailed mosaic of the Virgin Mary of Guadalupe, showing her in traditional blue and red robes with a starry mantle, set against a background of a church interior with a vaulted ceiling.

# Prayer to Our Lady of Guadalupe

Prayer of intercession to Our Lady of Guadalupe  
for the fruitfulness of Project Siempre Adelante.  
(Adapted from Evangelii Gaudium by Pope Francis)

**Our Lady of Guadalupe,  
Patroness of our diocese and first disciple of Jesus,  
You offered your life at the service of the Gospel  
and you continue to reveal your Son  
to all who are searching for truth and purpose.**

**Star of the new evangelization,  
help us to bear radiant witness to communion,  
service, ardent and generous faith,  
justice and love of the poor,  
that the joy of the Gospel  
may reach to the ends of the earth,  
illuminating even the fringes of our world.**

**Mother of the living Gospel,  
wellspring of happiness for God's little ones,  
pray for us.**

**Amen. Alleluia!**

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

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Dear Brothers and Sisters in Christ,

## Intro & Mission

It is with great gratitude and confidence in God's providential care for the Diocese of Orange that I present to you the timely revision of the 2018 Strategic Plan: *Project Siempre Adelante*. Ever since I was sent to shepherd the Diocese of Orange in 2012, I have committed our pastoral ministry to advance the salvific mission of evangelization.

At the dawn of the foundation of the Church, Jesus commissioned His apostles, *"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, teaching them to observe all that I have commanded you; and lo, I am with you always, to the close of the age"* (Mt. 28:19-20). Desiring to obey this command and extend Christ's presence in the world, we must call, form, and send missionary disciples whose love for Jesus Christ transforms the culture and attracts others with the good news of the Gospel. This is the Lord's work, and the fruitfulness of our missionary efforts is dependent on our conviction that He is with us at every moment.

## History & Need for Next Steps

In 2018, after much discernment and preparatory work from many individuals and groups, I initiated the first-ever five-year diocesan strategic plan. The strategic task force helped me identify various priorities to align our resources and efforts that directly supported the mission of evangelization in our diocese. These strategic focus areas were Evangelization and Faith Formation, Governance and Leadership, Clergy Formation, Stewardship and Finance, Catholic School Education and Schools Sustainability, and Christ Cathedral Campus Plan.

As we approach the end of the projected five years of this strategic plan, I acknowledge with gratitude to the Lord that we have accomplished many achievements. We witnessed the dedication of the Christ Cathedral and Our Lady of La Vang Shrine, both fostering an environment for prayer and an encounter with beauty that evangelizes beyond words. We also saw evangelization tools, training, and funding to support Catholic education increase in some parishes and schools. However, there is much more to accomplish.

The COVID-19 pandemic created unanticipated difficulties for our life together as the people of God, and it interrupted the implementation of key objectives in the 2018 Strategic Plan. I was grateful for the various adaptations and innovations that clergy and laity executed in response to the challenges of the pandemic. However, it became exceedingly difficult to initiate new efforts in evangelization, faith formation, and youth and young adult ministry. The reality of the uncertainty of the pandemic also led us to a very conservative approach to resources to ensure the financial viability of parishes and schools. With these limitations, new initiatives were not possible.

Upon our return to in-person ministry, it became apparent that the needs of our local church had changed. Many people in our diocese do not regularly attend Sunday Mass, and this number continues to decline. Our parishes are understaffed and lack the financial resources needed to launch tools of evangelization, especially for the youth and young adults in our diocese. Catholic elementary school enrollment declined, reducing the time and opportunity to form young

disciples. The Lord always calls us to improve our dedication to the mission He entrusted to us. As a local church, there is the reality of missed opportunities to support parishes in their evangelical mission. There also have been times when communication within the diocese could have been better to foster collaboration and support our mission.

With these concerns in mind, I have directed a renewal and deepening of our strategic planning process. Over the last year, I tasked a group of key leaders with developing well-resourced, measurable initiatives to foster evangelization and the proclamation of the Gospel not only within our parishes but throughout the Diocese of Orange. After carefully reviewing the present needs and realities in our diocese, five strategic areas were identified that focus our missionary efforts for the next five years.

We begin with prioritizing the work of **Parishes and the Mission of the Diocese** to foster a culture that focuses on forming missionary disciples through evangelization and faith formation. Consequently, this creates a stable foundation to direct fundamental resources to **Youth and Young Adult Outreach**, especially where the formation of youth is not prioritized or underserved. Youth are additionally formed as missionary disciples when we emphasize **Catholic School Identity** through faith formation, academic excellence, and service to others. **Governance and Communication** are necessary tools to ensure competent and effective management of all diocesan operations, including parishes and schools, and the promotion of their ongoing missionary initiatives. Finally, **Financial Resources and Stewardship** support the diocese's mission by managing resources, supporting ministry outcomes, and assisting parishes with operations and stewardship. With these priorities before us, I now invite everyone to join me as we move forward together with the updated strategic plan: *Project Siempre Adelante*.

## Vision & Focus

The mission of making disciples has not changed because it is our response to Jesus' mandate to His disciples. The methods for carrying out this mission must always be discerned according to the needs of our time, seeking effective ways to communicate the truth and love of Christ. St. Junípero Serra was a living witness of the Church's missionary zeal as he ventured forth to bring the good news of God's saving love to the Native Americans of California. His respect for the people he served, which was demonstrated in his writings, animated his ministry as he sought to improve their lives. St. Junípero's courage and determination to establish the Church's mission in California, despite hardships and setbacks, laid the groundwork for our diocese today. His motto, "*siempre adelante!*" inspired the vision of this strategic plan for the Diocese of Orange. Like St. Junípero, we want to identify and remove obstacles that impede our mission so we may continue to go forward in the name of Christ.

At the canonization of St. Junípero Serra in 2015, Pope Francis reminded us that "*Mission is never the fruit of a perfectly planned program or a well-organized manual. Mission is always the fruit of a life which knows what it is to be found and healed, encountered and forgiven. Mission is born of a constant experience of God's merciful anointing.*"

Whenever we move closer to Christ, we simultaneously move closer to those whom He calls us to serve. Let us pray for the missionary zeal that Pope Francis has continuously called the Church to deepen so our parishes, schools, and all the faithful of our local church go out to all nations and all people. May we be ready to accompany those seeking Christ in our midst and in our peripheries so that they may deepen their call as His believers and followers. Under the guidance



of the Holy Spirit, we can be evangelical witnesses of Christ's love who protect the dignity of every human life, especially the most vulnerable and disregarded by society. In addition, we want to secure our youth and young adults in the life of our local church so they may thrive as lifelong Catholics who know themselves to be loved by God and His Church.

## Implementation & Goals

The work of evangelization requires conversion and the sacrifice of time, financial resources, and individual agendas. I wish for all entities in the Diocese of Orange to work together in advancing the Kingdom of God. I want all clergy and their parish staff to know my desire to support them as they make the body of Christ visible in the Diocese of Orange. The diversity of peoples, parishes, and the many gifts we have in our clergy and lay ministers provide a richness to our mission. The Lord's grace unites us in our mission and impels us to collaborate with charity and generosity,

To bear fruit, we must be accountable for our resources. The assigned workgroups for *Project Siempre Adelante* discerned goals directly serving the diocese's mission. They determined measurable outcomes along with a proposed budget for each recommendation. I asked Dr. Erin Barisano, under Bishop Freyer's direction, to oversee the implementation of the updated strategic plan so we may stay on task and responsibly administer the resources according to our local church's needs. Consistent examination and accountability allow our goals and discerned outcomes to flourish and bear fruit that will remain according to the Lord's plan.

The goals and projected outcomes in the updated strategic plan ensure that each parish and school in the Diocese of Orange makes missionary disciples by evangelizing followers and equipping believers. It is the Lord who has called us to this diocese at this moment in history to work side by side with one another in His vineyard. It is the Lord who will make us holy and credible witnesses as He sends us into the diocese to love and serve as His disciples.

## Our Lady of Guadalupe

Our Lady of Guadalupe has always assured her maternal protection and guidance for those who are "on mission." As the Patroness of the Diocese of Orange, I entrust these plans, goals, and outcomes into her hands, and I am confident of her love and care for us. Her faith and union with Christ inspire us and give us the perfect model for all missionaries. Let us ask Our Lady of Guadalupe to pray for us so we may have her courage to go out into the world with deep faith and love for her son, Jesus. May her prayers help us fulfill this missionary mandate so that we will bear great fruit as disciples united with Christ and one another.

I wish to thank all those who contributed to the formation of this plan by offering their time, prayer, discernment, and deep love for the Church and God's people.

*Siempre adelante!*

Gratefully yours in the Lord,



Most Rev. Kevin W. Vann

Bishop of Orange

## II. Background to the 2023 Update of the Diocese of Orange 2018 Strategic Plan

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### A. The 2018 Strategic Plan

In 2016, as the Diocese approached its 40<sup>th</sup> anniversary, Bishop Kevin Vann initiated the development of the first-ever strategic plan for the Diocese of Orange. Noting the rapid growth in the Diocese and the providential acquisition of the former Crystal Cathedral, Bishop Vann saw the need for a comprehensive strategic plan to guide the Diocese into the future. The plan was developed over two years, involving the prayerful and collaborative efforts of hundreds of participants.

### B. Key Goals (Pillars) of the 2018 Strategic Plan:

#### ❖ 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.

#### ❖ Governance and Leadership:

Goal: The Diocese, 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.

#### ❖ 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.

#### ❖ 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, ensure ongoing sustainability, and maximize ministry outcomes. It will collaboratively work with the parishes to assist them in enhancing operating effectiveness and increasing ordinary income.

#### ❖ 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.

#### ❖ 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 welcoming, 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.

## **C. Achievements: 2018-2023**

### **What Has Been Accomplished**

#### **❖ Evangelization and Faith Formation:**

- Developed a five-year plan for formation in the Diocese, including enhancing liturgical life and the Sunday experience at all parishes.
- Leadership training, team building, and coaching were established and implemented in most parishes to help promote evangelization to the faithful. This effort helps foster effective evangelization and participation in young adults and youth ministries.
- Most parishes have implemented adoration schedules; however, while adoration is available at some locations on a 24-hour basis, many are only during the day, on certain days each month.
- The Diocese has encouraged evangelization efforts in the parishes such as Alpha, Dynamic Catholic, Amazing Parish, and the Evangelization Summit.
- Contemplative Missionaries of Charity established a foundation at the Diocese of Orange.

#### **❖ Governance and Leadership:**

- A survey of pastors was conducted which asked for feedback concerning each department of the pastoral center. Pastors were asked to rate each department for timeliness, helpfulness, and added value to the ministry of their parish and school. Using the survey results, staffing levels were adjusted, departmental improvements were made, and redundant activities were streamlined.
- The necessity and number of meetings of each RCBO board/committee were reviewed. Based on that review, some committees were eliminated, others consolidated, and unnecessary meetings were eliminated.
- During the Covid-19 pandemic, every parish was asked to report weekly the amount they received in their Sunday collection. This gave the Diocese the ability to receive current data, as compared to data that were months old. It also provided the opportunity to share best practices as pastors were asked what they were doing to keep collections steady (or to increase) during the pandemic. This information was shared with all pastors and business managers.
- The pastoral center drafted and publicized an organizational chart and set in place regular meetings to report out ministry outcomes. Directors were encouraged to focus on outcomes rather than on the number of activities.
- Activities at the Pastoral Center were better coordinated with the needs of the parishes.

#### **❖ Clergy Formation:**

- The Diocese has established a House of Prayer for Priests that is dedicated to being a refuge in their daily lives. There are annual priest retreats as well as encouragement to take personal retreats and join a priest support group.
- Bishop Vann routinely visits all parishes and helps to align them with Diocesan priorities, expectations, and canonical accountabilities.

#### **❖ Stewardship and Finance:**



- Diocesan operating budgets are balanced and aligned with the Mission, Vision, and strategic plan priorities. However, opportunities remain to address areas that would benefit from further improvement.
- Significant progress has been made in reducing Cathedral campus debt with plans to generate sufficient free cash flow to eliminate debt and build reserves.
- Events/hospitality team was reinstated, and program offerings and marketing of the Cathedral Campus have been expanded with the goal of becoming a global destination.
- Philanthropy for a Schools Endowment Fund to help support Catholic education became a focus for The Orange Catholic Foundation (OCF).

#### ❖ **Catholic Education and School Sustainability:**

- As an ongoing priority, the Department of Catholic Schools (DCS) has implemented Catholic identity and faith formation initiatives.
- The DCS has continued to reorganize and develop, in collaboration with school principals, new Mission, Vision, and Values statements.
- Efforts towards greater streamlined business processes as well as access to information have occurred to obtain and organize accurate business management, staffing, and related information from each school.
- Staffing standards for elementary schools, with job requisition protocols, have been implemented for all new and existing positions.
- Implemented a Shared Services Business Model at select schools has proven successful with improved visualization of data drivers and greater standardization of tuition pricing.
- The DCS has upgraded its onboarding and principal evaluation process, as well as expanded its training and professional development.
- Provided principals with spiritual, social, and emotional learning tools to affirm educators and enhance their professional development.
- Expanded training and professional development for teachers has been driven by the strategic use of data drivers.
- All schools are continuing to be moved to Meraki (cloud infrastructure), with improved filtering for all sites and devices, including alerts to safeguard students.
- Annual retreat for all teachers was started.

#### ❖ **Christ Cathedral Campus Plan:**

- Christ Cathedral was completed on time and on budget. It was dedicated on July 17, 2019, with a mass celebrated by Bishop Vann and attended by 60 bishops, 300 priests, and thousands of faithful. The dedication included an entire week of liturgical and celebratory activities.
- Christ Cathedral now has over 13,000 weekend mass attendees with masses in five languages.
- The Hazel Wright organ, the fifth largest pipe organ in the world, has been completely restored and dedicated.
- The Cathedral undercroft renovation with St. Callistus chapel and crypts has broken ground with scheduled completion in 2024.
- Our Lady of La Vang Shrine was dedicated in 2021, with the new Marian gardens and water features to be completed in 2023. The shrine has become a worldwide pilgrimage destination.
- The Christ Cathedral Memorial Gardens cemetery expansion was completed.

- A Cathedral Gift shop was opened featuring various religious items, books, and memorabilia about the Cathedral available for purchase.
- A team of knowledgeable docents was formed to provide tours of the Cathedral. This ministry was paused during the pandemic but is now active again.
- The signage at the Cathedral campus has been improved. QR codes were made available allowing visitors to download a campus map. A virtual tour of the Cathedral is available online.
- Security on the campus has been improved with a number of new security cameras monitored at all times. Certain access points to the campus have been modified to reduce the risk of vandalism or other threats. The Diocese is blessed with an excellent relationship with the Garden Grove Police Department.

## **What Remains to be Accomplished**

### **❖ Evangelization and Faith Formation:**

- To adequately engage youth (ages 11 - 17) each parish needs a full-time youth director.
- Young adult (ages 18 - 39) coordinators are needed to assist the parishes in developing regional teams.
- Best practices for engaging youth and young adults need to be provided to pastors and parish leadership.
- The Christ Cathedral Parish is in the process of instituting plan to become the model parish in evangelization and faith formation.
- A Center for Catholic Evangelization and Faith Formation has been initiated through the Emmaus Institute, and although it is available to parishes, schools, and other ministries, further development is needed.
- The Christ Cathedral parish needs an enhanced communication effort to become the preeminent center for creating and disseminating evangelization and faith formation content.

### **❖ Governance and Leadership:**

- The development of standard and consistent governance definitions and canon law educational opportunities to appropriate staff, leaders, boards, and committees still needs to be formally addressed at the Diocese. This action includes a continued reevaluation of all Diocesan boards, councils, commissions, task forces, and committees, as well as reviewing, revising, or sunseting any unnecessary governance structures or duplicated efforts.
- 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 has not yet been initiated.
- An ongoing concern is the lack of coordination and collaboration among Diocesan departments. There remains a “silo” mentality within the Pastoral Center.
- Communications throughout the Diocese are suboptimal due to a delivery platform that is antiquated and ineffective.

### **❖ Clergy Formation:**

- The Diocese continues to refine its assistance and resources for clergy training in evangelization and faith formation programs for parishes and schools.

- The Diocese needs to continue to provide homiletic training, clergy study, and convocations on spiritual topics specific to pastors, parochial vicars, and deacons.
- Continued training and support are needed for the clergy to assist them in hiring qualified administrative personnel and/or business managers. This will allow the clergy to focus on the spiritual welfare of the parish, parishioners, and school.
- Work is needed to better enhance regional and/or deanery approaches to evangelization and formation initiatives.

#### ❖ **Stewardship and Finance:**

- While the Pastoral Services Appeal (PSA) remains successful, and the Orange Catholic Foundation (OCF) has targeted fundraising, the Diocese has not coordinated effectively with OCF for broad-based fund-raising initiative.
- Significant enhancements to financial systems have been initiated, but this remains an opportunity and significant focus.
- Diocesan-funded education and training in the “professionalization” of the staff responsible for the financial management at all parishes, schools, and diocesan sites has not yet been initiated.
- Use of a common Chart of Accounts for parishes and schools is an untapped benefit.
- While the approval process for construction projects is working and is more streamlined, the Diocese has not yet adopted standards of excellence for the diocesan and parish structures.

#### ❖ **Catholic Education and School Sustainability:**

- A comprehensive, targeted marketing campaign is needed to help improve enrollment and retain existing students, particularly at under-enrolled and underrepresented schools.
- Specific marketing approaches for major ethnic communities, such as Hispanic and Vietnamese, remain a priority.
- Greater collaboration among the principals and schools is still needed to move from “I to We to One.”
- An assessment of principal and teacher salaries to ensure fairness and equity within the Diocese and reasonable competitiveness with public schools remains a priority.
- Schools that do not have a functioning consultative school board need to set this as a goal in their school improvement action plan.
- Although information from other dioceses has been gathered by the DCS, a specific description of responsibilities for pastors with a parish school has not yet been created.
- In collaboration with diocesan leadership and the OCF, plans to improve or add needed school facilities remain an opportunity.
- Religious program collaboration between schools and parishes has not been addressed Diocesan-wide; however, there has been some progress on a site-by-site basis.
- Aside from the Shared Services Schools, standardization for tuition pricing and tuition assistance is still being evaluated.
- Systematized tuition assistance and school subsidies is needed across all elementary schools within the Diocese.
- A cohesive and comprehensive school safety evaluation needs to be conducted across all schools within the Diocese.

#### ❖ **Christ Cathedral Campus Plan:**

- Although a Cathedral Gift shop was opened featuring a variety of religious items, books, and memorabilia, there remains an opportunity for improved food, beverage, and hospitality services. Land use of the entire Cathedral Campus property should be examined to ensure maximum benefits.
- Opportunities remain to achieve the goal of Christ Cathedral being the preeminent center for evangelization and faith formation in the Diocese.

## **D. The Need for an Update to the 2018 Strategic Plan**

The strategic plan was implemented starting in late 2018 with the anticipation that many goals would be achieved through the five-year time horizon ending in 2023. However, in early 2020 the Covid 19 pandemic shook the world and required massive readjustments by the Church to effectively respond to lockdowns and the needs of the faithful. As the pandemic progressed, the Diocese of Orange adjusted quickly with online masses, in-person instruction at Catholic schools, and measures put in place to conserve financial resources while continuing to minister to those in need.

The pandemic accelerated many of the trends that were already impacting society and the Church. Mass attendance fell, Catholic baptisms, confirmations, and marriages declined, and youth left the church. Society became more secular and polarized. These challenges highlighted the need to reassess the strategic plan in light of the new realities. Strategic plans are meant to be flexible to consider changes that always emerge over time.

This update focuses on the changed environment and reemphasizes the need for robust youth and young adult outreach, and for overall stronger faith formation and evangelization. These changes have been incorporated into this strategic plan update: Project Siempre Adelante.



### III. Mission, Vision, and Values of the Diocese of Orange

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The Mission of the Diocese chosen by Bishop Vann is taken directly from Jesus' "great commission" that he entrusted to his disciples and to their successors. It serves as a foundation and anchor for the Church of Orange. The Mission, Vision, and Values, taken together, provide an overall framework for the Diocese to use for its current and future actions.

#### **Our Mission**

"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.

#### **Our Vision\***

Our vision is to establish and support dynamic, vibrant parishes and schools which welcome all to live the Gospel with faith, joy, charity, and unity. Our Diocese encourages each person to have an active life of faith that is integrated and woven into the fabric of their daily lives through the community and sacramental life of the Church.

#### **Our Values\***

We value working collaboratively together "with humility, gentleness, and patience, maintaining our unity in the Spirit in the bond of peace." Together we seek: To worship by listening actively to the Word, praying for the needs of all, actively participating in the liturgy, and receiving God's grace in the Sacraments. To evangelize by the way we share our lives and treat each other, by the Gospel that we share, and by the strength we find in our community of faith.

\* Our Vision and Values statements will be reviewed and if necessary, modified to align with the priorities of Project Siempre Adelante.

## **IV. Areas of Strategic Focus for Project Siempre Adelante**

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After a thorough review of what was accomplished and what remains to be completed from the 2018 Strategic Plan and given the impact of the Covid 19 pandemic, the following areas of Strategic Focus were selected as top priorities for Project Siempre Adelante:

- ❖ Parishes and the Mission of the Diocese (Faith Formation and Evangelization)
- ❖ Youth and Young Adult Outreach
- ❖ Catholic School Identity
- ❖ Governance
- ❖ Communications
- ❖ Financial Resources and Stewardship

## V. Methodology Used

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The following is an outline of the steps taken to accomplish Project Siempre Adelante, the 2023 update of the Diocesan Strategic Plan:

- ❖ Reviewed current progress against the 2018 Strategic Plan, determined strengths and weaknesses and areas of needed emphasis for the updated plan.
- ❖ Siempre Adelante's planning team members were approved by Bishops Freyer and Vann. The members include key diocesan department heads and pastors. **[Appendix A]**
- ❖ A kickoff meeting was held to launch Project Siempre Adelante.
- ❖ Five work groups were established to focus on key strategic needs of the Diocese. Each work group was co-chaired by two planning team members: **[Appendix B]**
  - Parishes and the Mission of the Diocese
  - Youth and Young Adult Outreach
  - Catholic School Identity
  - Governance and Communications
  - Financial Resources and Stewardship
- ❖ A Spiritual Retreat was held for planning team members and other diocesan personnel.
- ❖ Diocesan leaders performed self-assessments to determine accomplishments of the six pillars of the 2018 Diocesan Strategic Plan and items remaining to be achieved.
- ❖ Personal interviews were held with 23 Diocesan staff and 3 Diocesan affiliates. **[Appendix C]**
- ❖ Information gathered by the Catholic Leadership Institute was reviewed and evaluated.
- ❖ Telephone interviews were made with leaders from seven other Catholic dioceses, asking them about the highlights and pitfalls they have experienced in their strategic planning.
- ❖ Confidential online surveys were distributed to all:
  - Pastors
  - Priests
  - Deacons
  - Catholic school presidents and principals
  - Catholic high school and elementary school teachers
- ❖ Planning team meetings were held monthly
  - Each work group reported on their progress and received input
  - Interview results were reviewed and discussed
  - Survey results were reviewed and discussed
  - Findings from other dioceses were discussed on how they might apply to the Diocese of Orange
  - Presentations were received from Catholic Charities, Orange Catholic Foundation, Our Lady of La Vang Foundation
- ❖ Advisors assisted each work group in preparing their findings and recommendations.
- ❖ Work group leaders presented final recommendations and a proposed budget for each recommendation.
- ❖ Proposed budgeted amounts were reviewed and adjusted, as needed, by the Chief Financial and Administrative Officer (CFAO), the Vicar General, and the bishops.

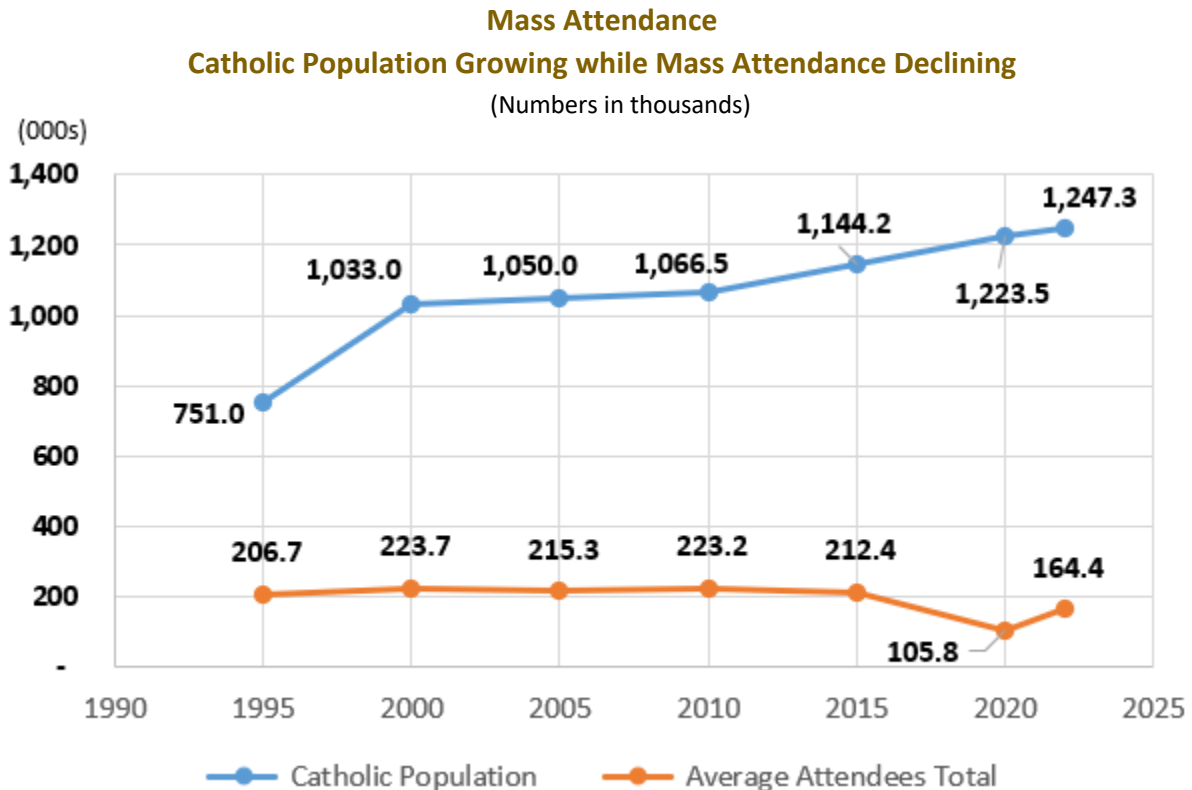
- ❖ Additional analysis was performed as needed.
- ❖ A Siempre Adelante Strategic Plan Coordinator was appointed to help oversee plan implementation.
- ❖ A simplified tracking system is being developed for plan implementation.
- ❖ The final report was drafted and revised with input from the workgroup leaders and planning team members, including Bishop Freyer. Final report presented to Bishop Vann for approval.
- ❖ Final report issued.



## VI. Summary of Key Findings for Project Siempre Adelante

### A. Parishes and Mission of the Diocese (Faith Formation & Evangelization) Findings

1. The number of Catholics attending mass has not increased in the past 27 years, even though the number of nominal Catholics in the Diocese has increased in the same period by over 60%.



2. The percentage of Catholics regularly attending mass continues to fall, from 28% in 1995 to 13% in 2022. Studies have shown that large numbers of youth and young adults are leaving the church.
3. Many of the faithful do not have a basic knowledge of the path to holiness, nor do they know how to pray.
4. For the church to transition from a Christendom to a mission-minded focus, there is a need that strongly suggests having evangelizing leaders in each parish. However, most parishes do not currently have evangelization teams or a process of formation for evangelization in place.
  - a. The survey of pastors indicates there is inadequate support for parish efforts for evangelization.
  - b. Approximately one-third of the parishes in the Diocese need assistance to provide adequate staffing to address areas of key concern, such as youth and young adult ministries.

## B. Youth and Young Adult Outreach Findings

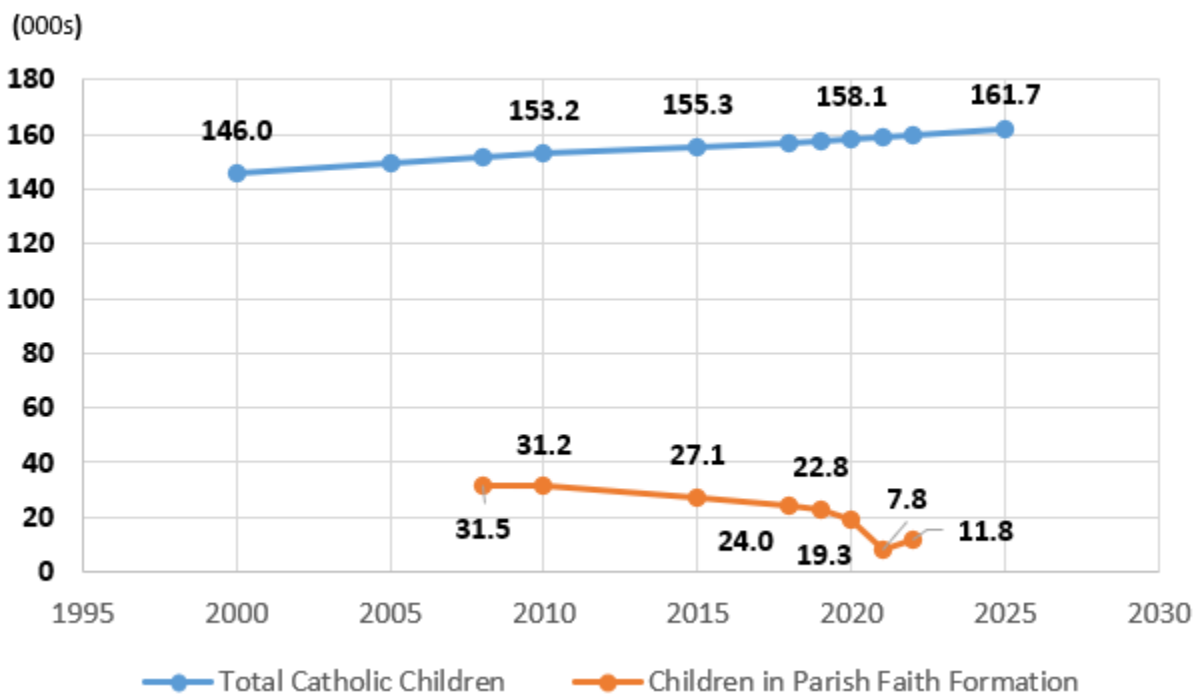
The findings below are grouped into two major categories: Youth, which includes middle school (ages 11-13) and high school (ages 14-17) and Young Adult, which includes both college age (18-22) and post-college age (23-39).

### Youth Findings (Ages 11-17)

1. The number of K-8 aged children in parish faith formation programs has declined precipitously by 62% over the past 12 years, from 31,200 in 2010 to 11,800 in 2022.

#### Diocesan K-8 Children in Parish Faith Formation

(Numbers in thousands)



2. Most parishes, and the Diocese, have inadequate staffing and financial resources for effective evangelization and faith formation for youth and young adults.
3. There is inadequate time or resources allocated to youth and young adult faith formation.
4. Only three parishes have dedicated staff for middle school students, even though many youths disaffiliate from the faith as early as 10 to 11 years old.
5. Most parishes do not have dedicated, paid, full-time youth ministers, even for high school students.
6. The two-year Confirmation process used by many parishes can be burdensome and complicated for many families and youth while consuming resources for parish staff. This creates a lack of opportunities for true conversion and little long-term effect on the faith of the youth.
7. The two-year Confirmation prep process is often ineffective because some high school students have not received catechesis since their first communion as a young child, are not actively practicing their faith at home, or are overwhelmed with other high school activities.

8. As reported in the latest project Siempre Adelante surveys, 100% of pastors, priests, and deacons indicated that faith formation is the most important need in the Diocese, yet it is not reflected in the amount of money and time that is allocated to it.
9. According to a recent survey of youth leaders, over 2/3 mentioned the following needs:
  - There is a lack of support both at the Diocese and at many parishes for youth ministry.
  - The formation opportunities are missing.
  - Many youth volunteers feel that they are not fully supported by clergy.
10. The Family Ministry in parishes that accompanies the family of the youth needs to be reimagined.
11. An evaluation of the Confirmation preparation program is required, and proper training should be made available.
12. High school youth ministry needs to be made a priority alongside Confirmation preparation programs in order to provide ongoing discipleship and Christian communities for teens.
13. Parishes should create authentic spaces where youth feel a sense of welcoming and belonging to lead them and form them to become disciples.
14. There is a need to provide more formation about youth ministry overall, including better training for clergy, parish staff, youth leadership, volunteers, facilitators, and catechists, as well as for parents, godparents, and sponsors.
15. Service to the poor and vulnerable by the youth is essential. Less talking, more doing – witnessing the faith is vital.
16. Discernment of one's vocation needs to be a continuous invitation to youth (ages 11-17), including but not limited to discernment experiences, faith-sharing, testimonies, retreats about vocations, etc.
17. Parishes should work toward creating comprehensive approaches to youth ministry with intentional and systematic faith formational goals, empowering parents and strengthening faith-filled families who are all engaged in a fruitful partnership of accompaniment to and with the youth.

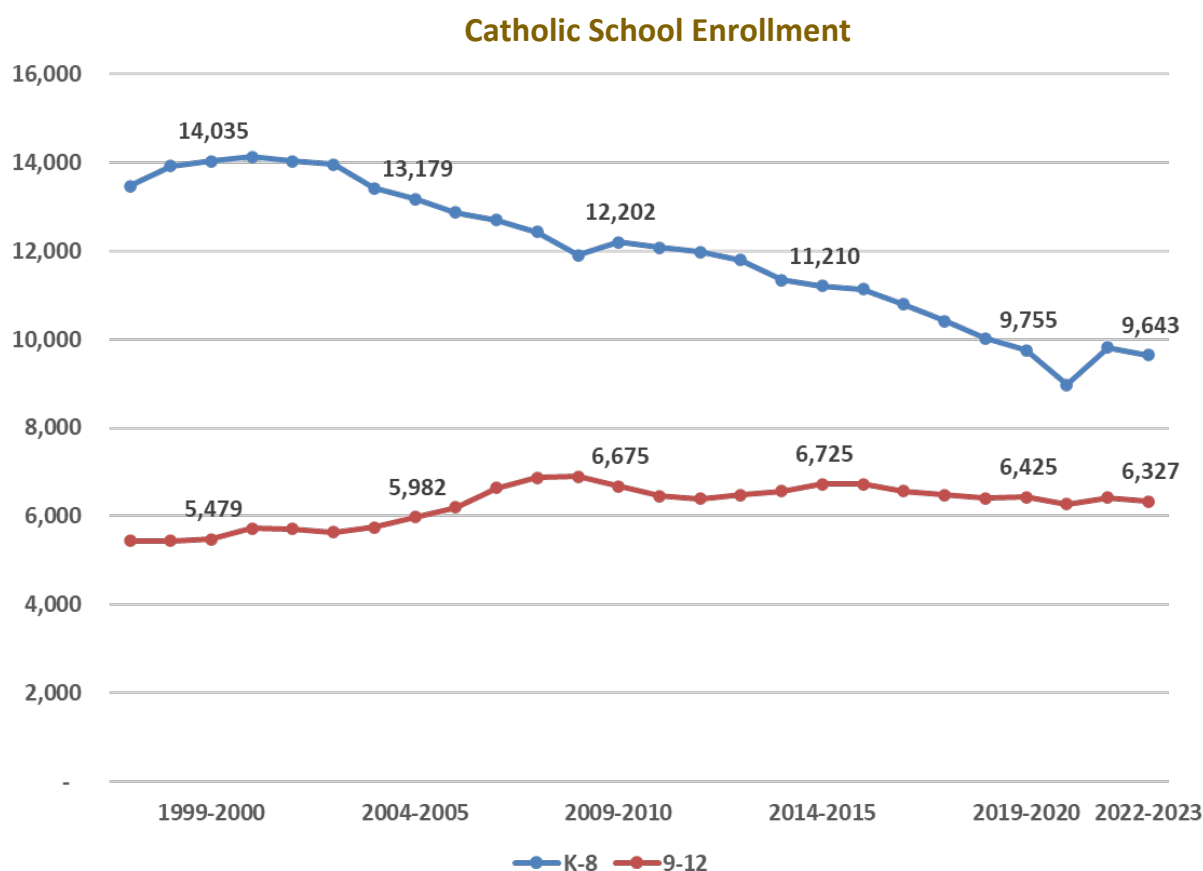
### **Young Adult Findings (Ages 18-39)**

1. Only 3 of 10 young adults stay religious after they arrive at college.
2. Young adults who leave the faith in college indicate that they do so because they saw judgment or hypocrisy in the Christian church, never connected to a church community, disagreed with the church's political or social issues, or simply drifted away because their time was dedicated to other matters.
3. Young adult ministries at parishes are often an afterthought and rarely invested in and supported.
4. Young adult leaders want to offer ministry opportunities and have a desire to be formed, but their lack of time, resources, and training directly conflicts and creates a challenging situation.
5. Young adult ministry, even when offered and lived out at parishes, lacks the comprehensive strategy and vision that the Bishops' document, *Sons and Daughters of the Light*, presents. This leads to a lack of engagement and an exodus from the Church.

6. Almost 90% of all young adult ministry efforts in the Diocese serve the “single young adult” demographic (18-30).
7. Young adult professionals (ages 23-39) are naturally looking for collaboration and community, especially in networking, and yet parishes and the Diocese offer very little.
8. Although young adult ministry should include serving older young adults from ages 30-39, there is little being offered for this age group, including young married couples or young families.
9. Unfortunately, some parishes have stated that they don’t want or have room for young adult ministry because they are “adults”. There may not be an appreciation or understanding of the importance of young adult ministries at the parish level. Consequently, resources such as meeting rooms and staff support are often unavailable for young adults. The parishes are already saturated and overwhelmed with activities. Therefore, there has been more growth in young adult groups “outside” the parish rather than within the parish.
10. There is very little intentional outreach for vocations to this age group.
11. Young adult families or newly married couples naturally go through a stage in life that requires support, prayer, and accompaniment. This provides an opportunity for parish engagement that is currently often missed.



## C. Catholic Schools and School Identity Findings



### Mission and Catholic Identity

1. Enrollment at high schools has remained steady, primarily because of an influx of non-Catholic students, who are an increasing percentage of the total. Elementary school enrollment peaked in 2003 and has declined since then. In 2023, there are approximately 2,000 empty seats in elementary schools.
2. While Catholic school K-8 enrollment has declined by 31% from 1999/2000 to 2022/2023, K-8 enrollment in the public schools in Orange County has also fallen during the same time period by 16%.
3. There is a need for a comprehensive marketing effort for elementary schools.
4. There is a clear Diocesan emphasis on our schools and intentionality placed on Catholic Identity.
5. There is strong Catholic leadership supported by the bishops, the superintendent, DCS team, and our Catholic presidents and principals.
6. Religion priority standards provide a focus on what must be done at each grade level (TK-8).
7. Many principals need annual faith retreats, and there should be additional faculty retreats at every grade level throughout the year.

8. Catholic school students know their prayers and have opportunities to pray throughout the school day, e.g., Angelus, St. Michael prayer, etc. This is one of the special qualities that make Catholic school students unique.
9. Catholic schools are encouraging students to come to Sunday Mass as a family in their school uniforms and have them participate as lectors, gift bearers, and greeters.
10. Catholic schools focus on the whole child: spiritual, mental, physical, and academic needs.
11. The faith-based curriculum provides the strength needed to address our students' social-emotional learning and the host of issues that they will be realistically faced within our culture.
12. The faith component of the accreditation process supports the importance of Catholic Identity in the schools and its integration throughout our curriculum.
13. There is a strong partnership with parents working together with the school and parish.
14. Each Catholic school has a well-defined mission, philosophy, and a set of Student Learning Expectations (SLEs).
15. While the schools in the Diocese of Orange have worked hard at their mission and Catholic identity, there has been no good measure to assess the outcomes of these efforts.

### **Governance and Leadership**

1. Catholic school governance and leadership can be seen as a ministry that promotes and protects the responsibilities and rights of the school community.
2. Catholic schools in the Diocese currently operate under various governance models: parish/ parochial, multi-parish, diocesan, private independent, or religious order.
3. The parish-based model that has served the Church and schools for generations has become more difficult to sustain, especially in economically challenged areas. Equal access for low-income students and equality of academic resources needs to be a priority.
4. Assessing different ways of funding and supporting Catholic schools to ensure vitality and success is imperative to make sound, data-informed decisions through a deliberative process before a crisis develops.

### **Academic Excellence**

1. The schools in the Diocese of Orange are highly rated academically. In a recent comparison, diocesan elementary schools generally excelled when compared with their public school counterparts.
2. All teachers and all schools are accredited in the Diocese.
3. The diocesan schools are leaders in technology and learning.

### **Operational Vitality**

1. Operational vitality includes four key areas: finances, human resources/personnel, facilities, and institutional advancement.
2. Catholic schools must adopt and maintain standards for operational vitality in these areas and define the norms and expectations for fundamental procedures to support and ensure viability and sustainability.

3. Even an academically rigorous school with a strong Catholic identity will not survive without operational vitality.
4. Over the past five years, the Department of Catholic Schools has implemented a variety of business practices to enhance the operational vitality of our schools, but more needs to be done.

#### **D. Governance Findings**

1. The still relevant recommendations from the 2018 Governance Work Group remain largely “not yet implemented” or “somewhat implemented” including:
  - a. Develop standard and consistent governance definitions and provide Canon Law educational opportunities to appropriate staff, leaders, boards, and committees. Provide education and reflection on canon law to inform and instruct governance leaders and to provide context in both theology and ecclesiology.
  - b. 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.
  - c. 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 and e-mail list to be kept up to date for all diocesan sites).
  - d. Develop standardized operational resources and tools for all human resource activities and financial reporting for all diocesan sites.
  - e. Define and communicate processes and procedures for decision-making between the parishes and the Diocese. Diocesan leaders 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.
  - f. 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.
  - g. 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.
  - h. 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 and committee chair training
    - Clarity about the sponsorship of groups and delegated authorities
    - Criteria for how groups are regularly reviewed
  - i. Provide education and reflection on canon law to inform governance leaders and to provide context in both theology and ecclesiology.

2. The Diocesan organizational structure and practices are not well understood, and best practices are not shared easily due to a lack of data in a common repository (intranet/filing system) and a lack of training.
3. The deanery meetings/structure are not being optimized.
4. Improved coordination is needed between Catholic Charities, OCF, and OLLV Foundation.

## **E. Communications Findings**

1. The need for up-to-date and properly managed e-mail and contact lists renders internal and stakeholder communications ineffective.
  - a. There are no clear guidelines to add individuals to contact/email lists.
  - b. People complain about getting too many emails or being excluded from specific email distributions.
  - c. Since lists are not properly and consistently managed, communications are not effectively reaching the intended audiences.
2. Important Diocesan initiatives that require parish and Pastoral Center involvement need to be communicated more in advance and, when possible, in person for better engagement and participation.
  - a. Pastors indicate a willingness to actively participate and engage their parishes on important issues and initiatives to the Office of the Bishop and the Diocese. However, it is difficult to manage day-to-day parish operations and take on these initiatives without proper or clear advance notice.
  - b. Like the pastors, Pastoral Center and Diocesan employees wish to be more engaged in important initiatives. However, there is often a lack of advance notice and clear participation direction.
3. Diocesan communications are suboptimal due to the antiquated communications delivery platform.
  - a. The current delivery system, Poppulo, needs to be replaced and allow the Communications Team and other diocesan departments access to modern customization to send engaging content consistent with the exceptional Roman Catholic Bishop Office (RCBO) brand.
  - b. Poppulo lacks customizable templates; therefore, its look is outdated, which is aesthetically unappealing.
  - c. The current platform is limited to email distribution, with no text or call options.
  - d. Poppulo is not user-friendly or intuitive. Sending simple communications with video or graphic content is time-consuming.
4. There needs to be clarity regarding the purpose and intended audience of some Diocesan communications channels like Global Email, Shepherds Update, Connect, and other newsletters.
  - a. With Global, the intention was to provide bulletin editors with content. Instead, it has morphed into more of a newsletter; as a result, the right audience may not receive the expected content.

- b. Shepherds Update goes only to priests, but there are complaints that the non-confidential content in Shepherds Update should be allowed to be shared with parish staff.
  - c. Connect is the newsletter that targets all diocesan employees, but it comes from the Editor of the OC Catholic. When the improved Parental Leave Policy announcement went out, it came from the OC Catholic editor instead of what should have been a Human Resources communication or newsletter.
- 5. The OC Catholic has engaging local content, but it is missing younger Catholics because its online version is old, unappealing, and there is no marketing effort to support it.
  - a. In 2019, the Diocese commissioned a study of the OC Catholic to help determine its viability. While the survey showed plenty of support for the paper delivery version, especially among the middle-aged and older population, the content is missing young Catholics.
  - b. There is no marketing effort to attract viewers to the online version of the OC Catholic. This has resulted in a low online readership.
- 6. Departments within the Diocese hold events and produce helpful resources and tools that go unnoticed; this is an internal communications failure.
  - a. Other than messages from fragmented channels (Global, Bishops Office, Connect, HR News), there isn't one place to share essential and meaningful information. This problem results in uninformed employees, who become uninformed messengers to those outside the Pastoral Center.
- 7. Parish communications lack professional expertise, which has a real impact on engaging parishioners and adding new ones.
  - a. Most parishes do not have anyone dedicated explicitly to managing social media, public relations, and website updates.
  - b. Parishes understand the need for effective communications but lack the resources (even part-time) to implement meaningful public relations.
  - c. Volunteer communications help is not adequate. Volunteers are unreliable, and communication must be a sustained effort.
- 8. There needs to be a concerted social media effort to attract and engage youth and young adults.
  - a. While there is a good effort to reach youth and young adults through programming, groups, and events, social media and digital engagement and support are lacking due to staffing needs.

## **F. Financial Resources and Stewardship Findings**

1. There is a question of whether the Administration/Finance/Operations have the technical talent and resources needed to adequately serve the Diocese.
  - a. Survey results indicate that employees do not know who to contact. The scores are low in planning and financial support.
  - b. There have been material/significant control issues on financial reporting during the past seven years.
  - c. Metrics and personal accountability need to permeate the organization.
2. There needs to be a philosophy of service! How does the finance organization support the parishes and schools?
  - a. How does the finance office build trust between the Diocese and the parishes and schools?
  - b. How does the finance office drive a culture of service? Who works for whom?
  - c. The finance office needs to be seen as a resource supporting the parishes and schools.
3. Best practices need to be developed for finance and administration that support the pastors and school principals. There needs to be a playbook and support structure in place when a parish business manager position turns over.
  - a. Pastors are not trained in business and administration.
  - b. There is limited or nonexistent training for incoming business managers.
  - c. Selection process for business managers is by the pastor with limited CFAO support.
  - d. New business managers' pay range and skill set varies wildly.
  - e. Because of the above, parish business managers vary widely in competencies.
4. What tools must the Diocese make available to parishes and schools to maximize their effectiveness, i.e., Information Technology, Human Resources, Construction, and Accounting?
  - a. High school administrators are unclear on operating and capital expenditure guidelines and often act independently in the areas of banking and savings.
  - b. Construction project software (CPAS) guidelines are confusing.
  - c. The existing information technology cyber security strategy and the common platform is confusing.
  - d. There is a lack of a central contacts database.
5. The Diocese needs to think differently about its Diocese/Parish relationship; that is, how does the Diocese help finance the parishes and not the other way around?
  - a. The combination of the cathedraticum, the markup on insurance, and the Pastoral Services Appeal (PSA) represent a significant portion of parish revenue going to the Diocese.



- b. Financial constraints at the parish level impede youth ministries and other critical evangelization ministries.
  - c. The consensus remains that Catholic schools in lower socioeconomic areas are more likely to have lower enrollment or be closed.
- 6. Faced with an unprecedented opportunity with the generational transfer of wealth in Orange County, how can the Diocese take advantage of this?
  - a. How can the Diocese work with OCF to build OCF's image and increase its credibility?
  - b. What compelling needs can the Diocese provide OCF to present to donors?
  - c. What is the long-term role of PSA?
- 7. What are new and creative revenue streams that could/should be developed? How does the Diocese become financially self-sufficient?
  - a. Ever-increasing taxes on parishes is a formula for long-term disaster.
  - b. Copy what works in other dioceses (mortuary business, expansion of cemeteries).
  - c. Leverage the current Cathedral campus to manage costs and develop revenue sources.
  - d. The Diocese is amongst the largest landowners in Orange County; how can this asset be leveraged?
- 8. Christ Cathedral Campus can be disorganized and difficult to navigate:
  - a. The Diocese is currently reactive vs. proactive in welcoming the faithful.
  - b. There are perceived unreasonable fees charged to ministries and Catholic organizations.
  - c. The process for booking an event is cumbersome.
  - d. There are missed opportunities for traveling exhibits, speakers' series, and movie previews.

## VII. Recommended Goals for Project Siempre Adelante

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### A. Parishes and Mission of the Diocese (Faith Formation & Evangelization) Recommended Goals and Outcomes

**Our Mission:** To foster a culture of missionary discipleship and evangelization throughout the Diocese of Orange.

#### Goal 1

**Assist the parishes, through ongoing support of the pastor and his team, in developing or strengthening evangelization and faith formation. (Parish Accompaniment)**

##### **Outcomes:**

- a. For the pastor and his team, help provide clarity of vision, systematic communication, and proper alignment for the parish concerning evangelization.
- b. Assist in a healthy organizational culture led by a core evangelism team prepared and trained to understand the priority of prayer, the importance of respect for each person, how to engage conflict and disagreements fruitfully and how to have critical conversations. Assistance in managing changes in parish commitment of resources (budget, facility space, calendaring). Tools and training for these specific goals will be provided.
- c. Increased participation in Mass and in ministries, changes RCIA numbers, etc. will primarily be used to measure outcomes.
- d. In Fiscal year 2023-24, three parishes will feature full parish accompaniment and nine additional parishes will have a more limited accompaniment.
- e. In addition, we will maintain an active awareness of Christ Cathedral's plan and share best practices for evangelization and faith formation.

#### Goal 2

**Establish a School of Evangelization to support parishes in becoming centers of evangelization.**

##### **Outcomes:**

- a. Each year a minimum of 20% of the parishes or centers (12) will have parishioners/representatives that attend.
- b. Parish evangelization committees will be formed by parishioners attending the school. This will greatly assist parishes in implementing evangelization.
- c. We will work with each evangelization team to engage 200+ people in evangelization each year.

#### Goal 3

**Rebrand Emmaus Institute as Lumen Christi to provide expanded faith formation education opportunities in the Diocese of Orange.**

##### **Outcomes:**

- a. With Lumen Christi, Catholic school teachers will have a new and attractive option for formation for Basic Certification.
- b. Volunteer catechists and movements/movimientos will have additional options for advanced studies in evangelization or Biblical studies.

- c. We anticipate approximately 3,000 teachers, catechists, and volunteers will initially be served with a 25% increase in 2024 and a further 15% increase in 2025.
- d. A survey will be conducted at the beginning and at the end of the course year to identify strengths and challenges within the course offerings. Based upon the results, needed adjustments or improvements will be implemented.

#### **Goal 4**

**Initiate a Diocesan Kerygmatic Retreat Initiative to renew and strengthen personal encounters with Jesus in the proclamation of the Gospel.**

##### **Outcomes:**

- a. Zeal for sharing the Good News of Jesus will be increased in diocesan employees and other attendees, supported by a mindset of missionary discipleship.
- b. 2,000 people will complete the retreat over a 3-year period. This will be measured by surveys and ultimately in increasing participation in mass, adoration, giving and service.
- c. Before each retreat begins, a survey of key indicators (for example: Mass attendance, daily prayer practices, engagement in adult faith formation or movements, reading/studying of the Bible, etc.) will be administered. The same survey will be given to attendees at an appropriate time following each retreat to measure against the key indicators.

#### **Goal 5**

**Continue the I Thirst Movement as a means of Eucharistic revival.**

##### **Outcomes:**

- a. Inspirational content will lead to a desire for missionary discipleship and reinvigorating faith.
- b. I Thirst follow-up sessions will have approximately 2,500 new participants per year.
- c. 16,000 registered recipients will receive weekly I Thirst videos and training.
- d. I Thirst 52 Week follow-up will be sent to attendees.
- e. I Thirst Spanish is currently in process.

#### **Goal 6**

**Increase Saint Paul Street Evangelization to train the faithful to evangelize in a non-confrontational manner.**

##### **Outcomes:**

- a. Participants will obtain hands on experience in sharing the Good News with others.
- b. A minimum of 10% parishes or centers (6) will participate each year.
- c. The diaconate community, both the aspirants and candidates, will participate in training, followed by “hands on” street evangelization the last week of June each year.
- d. Individual parishes (such as St. Hedwig, St. Juliana, St. Mary’s) will receive adult training.
- e. Other parishes (such as Blessed Sacrament) will have teen training.

#### **Goal 7**

**Enhance TV/Radio/Social Media Outreach to support all aspects of evangelization and faith formation.**

##### **Outcomes:**

- a. In FY 24, twelve (12) parishes will be invited to use media to enhance their evangelization efforts.
- b. Content that is highly effective in youth and young adult evangelization will be measured by survey results.

## **B. Youth and Young Adult Outreach Recommended Goals and Outcomes**

**Our Mission:** To transform young hearts and minds for Christ, which in turn will transform families, communities, and our entire Diocese of Orange.

### **Youth Ministry Outreach**

The Youth Ministry Outreach recommended goals have three foundation steps and two follow-up steps to ensure full integration; these five recommended goals will ensure proper engagement, formation, and involvement of middle school and high school youth.

#### **Goal 1**

**Expand and strengthen the youth ministry diocesan Team by hiring at least one additional full-time, exempt team member that will be able to lead, challenge, strengthen and accompany parishes with their youth ministry efforts, including a comprehensive middle school and/or high school student ministry outreach. Depending upon outcomes, an additional full time team member may be needed.**

#### **Outcome:**

This position will help ensure that 50% of the parishes have a full-time, trained Youth Minister by June 2024. Additional staffing needs will be assessed during the 2023/24 year to determine if one additional staff member is sufficient.

#### **Goal 2**

**The Department of Youth Ministry will partner with Diocesan Finance to assess the appropriate financial resources available at an individual parish for the purpose of youth programs.**

- In 2023/2024, 50% of the parishes will have a youth ministry headed by a well-qualified full-time Youth Minister, paid a competitive salary that is funded by the parish itself or with Diocesan assistance.
- In 2024/2025, the remaining 50% of parishes will have a youth ministry headed by a well-qualified full-time Youth Minister, paid a competitive salary that is funded by the parish itself or with Diocesan assistance.

#### **Outcome:**

Will ensure that the resources are available to support 50% of the parishes in 2023/24 in hiring and developing full-time youth ministers to serve middle and high school students. (Diocesan financial support will be focused on parishes located in low- income areas, while parish support will be focused on parishes located in higher-income areas.)

#### **Goal 3**

**Consult with the Diocesan Finance Office and the Orange Catholic Foundation in establishing two types of ministry grants: specific and open-ended. The purpose of the grants is to create and fund more purposeful and intentional efforts that will**

**ultimately result in outreaching, evangelizing, and engaging additional youth and their families.**

**Outcomes:**

- a. Where implemented, REVIVE Ministry grants, which encourage parishes to be creative in youth outreach, will increase youth participation by 50-100% by June 2024.
- b. Where implemented, 10:10 Ministry Grant will ensure that a ten-member teen discipleship group (cohort) will be developed to serve as a model of small group discipleship by June 2024. (Which then can be replicated in the following years and as a best practice across the diocese).
- c. Where implemented, Family Engagement Grants will ensure that at least ten parishes begin to develop family ministries in 2023-2024.

**Goal 4**

**Offer ongoing formation for youth leaders and their volunteers that is supported by the expansion of the Diocesan youth ministry team. This formation will provide tools such as 360 evaluations, a comprehensive Catholic youth ministry toolkit, in-person national certificate training courses, and onboarding opportunities that will assist our youth leaders to better serve the youths and their families as they grow their foundation of faith.**

**Outcome:**

- a. Every youth ministry leader (responsible for middle school, confirmation and/or youth ministry) in the parish will participate in at least two formational events
  - For parishes that receive diocesan assistance for their youth ministry, attendance will be expected.
  - For parishes that finance their youth ministry, attendance will be strongly encouraged.

**Goal 5**

**Integrate the youth ministry vision to connect with parish middle school students and Catholic high school students.**

**Outcome:**

Connect and integrate Catholic middle school and high school students in at least 10 parishes, in an intentional effort to ensure ongoing transitional ministry support. Partnering with campus ministry leadership may help facilitate this collaboration.

**Young Adult Ministry Outreach**

The Young Adult Ministry Outreach recommended goals have four foundational steps to ensure the proper engagement, formation, and involvement of young adults who can be found in our churches, college campuses, communities, and ministries. These goals help serve willing parishes in ministering to all their young adult parishioners.

**Goal 1**

**Expand and strengthen the Diocesan youth and young adult team by hiring a Diocesan Young Adult Coordinator and three Young Adult Regional Coordinators that will be able to lead, accompany, and assist parishes with visioning, strengthening, and supporting their young adult leadership and young adult offerings.**

**Outcome:**

Young adult ministries in parishes throughout the diocese will double by June 2024, resulting in increased mass count, sacramental marriages, baptisms and vocations starting in FY2025.

**Goal 2**

**Provide financial resources and support for parishes for young adult ministry. Work with the Diocesan Finance Office and the Orange Catholic Foundation to establish two funding vehicles (opportunity scholarships and parish staffing grants) that will support parishes which need financial help to build their young adult programs.**

**Outcomes:**

- a. For the Opportunity Scholarship, scholarships will serve a minimum of 30 young adults in training for ministerial leadership in 2023/24.
- b. For the Parish Staffing Grants, five to ten parishes will be able to add a young adult minister to their staff.
- c. Additional outcomes will be the same as stated under Goal 1.

**Goal 3**

**Partner with parish leadership to support young adult ministry and develop a young adult ministry action plan. Once the young adult ministry action plan is approved, the Office of Young Adult Ministry is committed to assisting the parishes with the promotion, identification, and training of its young adult leadership.**

**Outcome:**

Ten parishes will develop fully integrated young adult action plans for the upcoming ministerial year, FY 2024-2025.

**Goal 4**

**Train and recruit young adult leadership. Young adult ministers must be trained, formed, and committed with appropriate and effective onboarding, metrics, and follow-up.**

**Outcome:**

Ten parishes will begin to build and train Young Adult Leadership by June 2024

## C. Catholic Schools and School Identity Recommended Goals

**Our Mission:** As a ministry of the Diocese of Orange, in partnership with our parents and parish families, our schools are committed to making disciples of Christ. Through Catholic faith formation, academic excellence, and service to others, our students transform the world.

### Goal 1

**Strengthen the Catholic identity of our youth through sustainable, academically excellent, and faith-filled Catholic schools. This goal will be achieved in the following ways:**

- Re-ignite charism or patron saint of the parish at school sites. Identify those characteristics/values and promote them as a tool for evangelization (e.g., Dominican, Servants of Mary, Presentation Sisters, Sisters of St. Joseph of Orange, etc.).
- Implement a clear, comprehensive, and effective catechetical formation process for elementary teachers.
- Implement a faith-based parenting formation program that focuses on the vocation of Catholic parenting.
- Create guidelines for principals to intentionally “Hire for Mission”.
- Implement Virtues in Practice Program at elementary schools.
- Create and implement teacher ministerial formation for high school teachers.

#### **Outcomes:**

- a. Students, teachers, staff, and administrators will be able to identify the charism of the school’s founding order and/or virtues of its patron saint and utilize the charism and/or virtues to evangelize to the larger community through oral and written communication, acts of service, and encounters with others.
- b. A clear, comprehensive, and effective catechetical formation process will develop competent leaders in the Catholic faith who can identify, demonstrate, and live Catholic scripture and values, and will form practitioners who empower and serve their communities through the mission and word of the Catholic faith. This will be measured by a continuation of surveys given to presidents, principals, and teachers to determine their growth in these leadership qualities.
- c. A successful faith-based parenting formation program will help parents become more effective in their role as the primary religious educators of their children and help parents understand their faith better so that they can pass it on to their children. This will be evidenced by such indicators as, increased Mass attendance, greater involvement with parish life, etc.,
- d. Hiring for Mission guidelines will assist principals vet applicants during the interviewing process to ensure that new teachers are committed to the mission of Catholic education and practice their faith so that they may serve as role models to their students

### Goal 2

**Develop a new governance structure and network for the five most under-enrolled parish schools.**

#### **Outcome:**

A new governance structure and network will lead to increased enrollment (by an estimated growth of 7% per year) and a leveraging of network resources to better serve



students. Additionally, it is anticipated that there will be an increase in investments from funders which will decrease diocesan subsidy to each school, which will lead to long term school sustainability.

### **Goal 3**

**Establish a robust marketing and student retention plan for elementary schools to increase student enrollment. Marketing strategies will include intentional outreach to Latino and Vietnamese communities.**

#### **Outcome:**

An effective marketing and retention plan for elementary schools will result in increased enrollment at under-enrolled schools across the Diocese.

### **Goal 4**

**Increase funding for Catholic schools by collaborating with OCF to formalize a sister parish/ school program to support schools in need and to reach out to individual donors to support specific schools and projects.**

#### **Outcome:**

An effective sister parish/ school program will increase funds designated to support Catholic schools which will lead to long term school sustainability

### **Goal 5**

**Implement a diocesan-wide tuition assistance program for teachers/ diocesan employees to support them in sending their children to Catholic schools.**

#### **Outcome:**

An effective tuition assistance program for teachers/diocesan employees will increase the number of teachers/ diocesan employees who enroll their children in Catholic schools

### **Goal 6**

**Conduct an in-depth analysis by end of year 2023 of the Diocesan Teacher Salary Scale to 1) ensure entry-level teachers receive competitive compensation and 2) ensure Catholic school teachers' salaries reflect a minimum of 80% of public-school salaries across all levels.**

#### **Outcome:**

A comprehensive analysis will result in a revised salary scale that will help recruit new teachers and retain veteran teachers

### **Goal 7**

**Strengthen the academic and support programs at our schools to support the high achievement of all students.**

#### **Outcome:**

Stronger academic and support programs will result in increasing Star Math and Reading proficiency by 10 percentage points over four years.

## **D. Governance Recommended Goals**

**Our Mission:** The Diocese will have in place governance structures and processes that help ensure responsible, effective, and efficient management of all diocesan operations, including the parishes and schools.

### **Goal 1**

**Ensure that relevant recommendations from the 2018 Strategic Plan are implemented.**

- Diocesan boards and committees that meet on a regular basis have a charter, bylaws, and the approval to operate.
- Update a published directory of Diocesan boards and committees annually, with a target due date at the end of the calendar year.
- Maintain and make accessible to diocesan leadership a centralized, standard file management system (charter, bylaws, agendas, minutes, subcommittees, etc.).
- Assign a dedicated resource, either within [or designated by] the Vicar General office or CFAO office, to document and update Diocesan administrative policies and procedures.
  - Expressly designate a person/group/consultant to oversee implementation with regular assessments.

#### **Outcome:**

Clear understanding of our organizational structure, governance requirements and resources which results in improved efficiencies and cost-savings, as well as reduced legal risk and conduct annual audits to ensure above recommendations.

### **Goal 2**

**Enhanced meaningful efficiencies.**

- Hire a director/manager of training and professional development to lead the implementation of processes, best practices, and development of people through training across the Diocese.
  - Regional human resources managers will assist in implementing and serving as a local resource to locations (1 manager to serve every 1,000 employees)
  - Recruiting program implemented to assist Pastoral Center departments, parishes, and locations in providing expertise in finding the best talent and increasing retention rate.
  - Evaluate a fee-for-service model.
- Develop training programs that may include mandated onboarding and compliance programs, continuing education/development courses offered in-person and online programs, and peer-to-peer mentoring.
- In addition to formal programs, best practices will be shared via a library on an intranet or over informal gatherings, such as lunch and learn.

#### **Outcome:**

Realize meaningful efficiencies, ensure compliance, and plan for the future of our Diocese in order to reduce legal fees and outside recruiter fees; increase pool of qualified applicants; reduce turnover and improve retention rate; improve quality of service to locations by Pastoral Center staff.

### Goal 3

#### **Improve utilization of Diocesan Deaneries.**

- Develop a more localized approach to governance for deanery meetings attended by priests. Deanery meetings will include periodic visits/updates from Pastoral Center directors/teams, especially when new initiatives are launched.
  - The deanery organization provides the vehicle for parishes and parish staff to share “best practices” with each other. Deanery leaders will be taught best practices of how to conduct meetings effectively.

#### **Outcome:**

Effective use of the existing deanery organization to share best practices among parishes, semi-annual surveys sent to pastors to assess the effectiveness of the deanery meetings, and impact use of deanery system by Pastoral Center departments.

### Goal 4

#### **Strengthen and improve collaboration among Diocesan affiliates.**

- Multiple diocesan Catholic organizations are seeking corporate and large private donations (Catholic Charities, Orange Catholic Foundation, Our Lady of La Vang Foundation, the Diocese) from a limited group. Strategic sharing of information and collaboration among our affiliated organizations has benefits, such as cooperation in the timing of fundraising events which should help ensure maximum interest/contributions.
- Utilize a common database and resources from the Diocese to help coordination.

#### **Outcome:**

Strengthen and improve collaboration among Catholic Charities, Orange Catholic Foundation (OCF) and Our Lady of La Vang (OLLV) Foundation with periodic meetings to share ideas and best practices to occur in FY24 with a follow-up survey to assess effectiveness and purpose.

## **E. Communications Recommended Goals**

**Our Mission:** The mission of the Office of Communications is to protect the reputation of the Diocese and promote Orange County's diverse and thriving Catholic community, including major events at Christ Cathedral and the ongoing work of the Office of the Bishop, parishes, ministries, and schools.

### **Goal 1**

**Develop, implement, and maintain an email/contact list to be audited yearly. Utilize and build upon current IT-generated solutions that centralize databases.**

- Assign a two-person team consisting of a representative from IT and Communications to oversee an email/contact list audit within the Diocese. This includes working directly with each department to determine what lists exist, who is on each list, and what communications each list should receive.

#### **Outcome:**

Internal and stakeholder email and newsletter communications will better reach desired audiences with email interaction improvements.

### **Goal 2**

**Establish semi-annual "kick-off" meetings for the Office of the Bishop and/or senior leadership to communicate to all Pastoral Center staff/pastors of upcoming Diocesan initiatives.**

#### **Outcome:**

Improve engagement and participation and measured by a follow-up survey.

### **Goal 3**

**The Communications Department will identify a replacement for Poppulo with a new single communications delivery platform that can send and distribute content in multiple formats: email, text, and phone. This will help better reach intended audiences by serving individual preferences.**

- Deploy an awareness and implementation campaign to roll out the Poppulo replacement

#### **Outcome:**

Optimize the Diocesan communications delivery platform that improves quality and audience engagement, such as open rates and click through rates.

### **Goal 4**

**For each communication (Global, Shepherd Update, department emails, newsletters, etc.), spell out its objective, identify its target audience, and match the recipients against the audited contact list.**

- Conduct annual surveys and review analytics for each communication using online tools to inform of any changes and measure improvements.

#### **Outcome:**

Diocesan emails become more impactful.

### **Goal 5**

**Work with a website developer and graphic designers to re-brand, re-build, and re-launch the OCCatholic.com website. Survey stakeholders to gather input before designing the new website.**

- This will help drive youth and young adult readers to the OC Catholic and its content

**Outcome:**

Better reach and engage younger Catholics via online version of OC Catholic as determined by baseline web traffic versus traffic after re-brand, time spent on content, and survey results within target demographic.

**Goal 6**

**Develop and deploy a Diocesan employee intranet curated for each employee.**

**Outcome:**

Improve internal communications and better connect employees with available diocesan resources and tools.

**Goal 7**

**Communications Department to develop a program that helps fund part-time communications coordinators in each parish that does not already have such a program.**

- Parishes will hire their own coordinator, but in exchange for a Diocesan-funded stipend, coordinators must produce a communications and social media plan and meet online with the Diocesan Communications team for monthly check-in and support related to their plans

**Outcome:**

Better parish-parishioner engagement and communications activities aligned with parish goals by developing parish communication plans, increasing engagement with targeted audience.

**Goal 8**

**Add a full-time Youth and Young Adult Social Media and Marketing Coordinator to the Office of Communications staff.**

- This staff member will directly support all initiatives for youth and young adults at the Diocese

**Outcome:**

Meaningfully and consistently engage youth and young adults on social and digital media using best practices.

## **F. Financial Resources and Stewardship Recommended Goals**

**Our Mission:** The Diocese, its pastoral center departments, ministries, parishes, schools and governance structures, will appropriately manage and maximize 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 stewardship initiatives.

### **Goal 1**

**Establish a culture of service across all operations, administration, and finance functions at the Pastoral Center.**

- Implement service metrics across various departments, such as Information Technology (IT), Facilities, and Hospitality.
- Garner survey feedback from business managers and construction customers.
- Solicit input from Diocese leadership, parish pastors, and business managers.
- Live it! Servant leaders operate with humility and fairness, seek out and provide honest and candid feedback. Expect each team member to be professional and service minded.

#### **Outcomes:**

- a. Obtain survey results, including those for leadership, that reflect an outstanding rating.
- b. Survey results will reflect IT help desk and facility maintenance response time with a satisfaction rating of 95%.

### **Goal 2**

**Implement the necessary level of technical competency and professionalism to support the financial, administrative, and operational needs of the Diocese.**

- Upgrade or restructure to address organizational weaknesses as they occur.
- Restructure the Construction & Real Estate Department.
- Add an additional internal auditor position.
- Upgrade existing accounting position to a manager that supports the Construction and Cemeteries departments.
- Expand human resources services (payroll, training, professional development).
- Add financial analysis positions and provide training.
- Provide staff to support Catholic School shared services.

#### **Outcome:**

Fund and fill positions with outstanding personnel by the end of 2023/2024 so that the technical and service needs of the Diocese can be adequately met. These include:

- completing 30+ internal audits per year
- developing and implementing a construction and real estate long term strategy
- supporting parish and school construction projects with outstanding service
- expanding financial support for cemetery and construction departments
- moving HR from a reactive crisis management more towards professional development that helps resolve core organizational issues facing the Diocese

### **Goal 3**

**Develop and implement the necessary tools to support the Diocese in cash management, financial reporting, information systems, human resources, project management, and investment management.**

- Incorporate needed tools into each department manager's goals and objectives.
- Expand the utilization of data visualization software (Power BI), leading to a culture of data and analytic decision-making.
- Successfully expand the built-in functioning data lake.
- Provide onboarding and new employee training to improve the effectiveness of new personnel and accelerate their acclimation to the work environment.
- Utilize Construction/Real Estate project management tools to track and monitor construction project costs more effectively.
- Improve investment and treasury analytics to enhance investment strategies and decisions.

**Outcomes:**

- a. Increase the usefulness of Power BI reports to provide in-depth financial analysis and trends for pastors, business managers and Diocesan leadership. This will help them make well-informed, timely financial and economic decisions.
- b. Increase the quality and quantity of information held in the data lake. This will expand the applications of business intelligence tools to help the Diocese make improved decisions. Examples of areas to be included are school tuition setting and monitoring, and CPAS project tracking.
- c. Overall improvement in timeliness, usefulness, and overall impact of financial data to be measured by survey results.

**Goal 4**

**Drive ownership and accountability throughout the CFAO organization. Align individual and organizational goals with the needs of the Diocese.**

- Expand productivity by adding department goals, metrics, and action items to achieve these metrics.
- Align next year's compensation to move towards pay-for-performance.

**Outcomes:**

- a. Goals and objectives will be complete and metrics set in place for departments. These are the basic building blocks needed to implement accountability and ownership across an organization. Clear department goals start the process but defined actions to execute and metrics to monitor success are essential to implement a culture of ownership and accountability.
- b. Compensation adjustments will be aligned with departmental metric results.

**Goal 5**

**Build a strong working alliance with pastors, principals, and business managers, clearly focusing on supporting their needs. With a cross-functional team, develop a playbook for incoming business managers, including training, best practices, job definitions, and duties.**

- Create a cross-functional business manager team.
- Develop training and best practices for new business managers.
- Enhance new Pastor training.
- Ensure quality service through the work provided in construction projects, human resources support, accounts payable, IT, hospitality, and facilities.



**Outcomes:**

- a. Put a cross functional team of business managers, shared services staff, and HR personnel in place with measurable deliverables such as a job description for business managers, consistent cash counting procedures, standard financial reporting, and a standardized chart of accounts. The cross functional team will help the work relationship and collaboration between Diocesan and parish personnel. The objective of this cross-functional team is to make the Business managers a part of the solution for key areas such as:
  - improving and simplifying the budget process
  - simplifying and standardizing process for onboarding new employees
  - improving and training parishes on consistent cash control procedures across the Diocese.
- b. Complete three new training modules by the end of 2023/2024 fiscal year:
  - new pastors
  - financial overview for new pastors
  - business managers
- c. Improved CPAS turnaround time, timely accounts payable; an effective response to human resources inquiries through survey results.

**Goal 6**

**Develop and implement alternative revenue and income sources to provide long-term financial stability and reduce dependence on the parishes for economic support.**

- Developing a mortuary services business with a storefront concept in 2023/2024 and a mortuary in 2024/2025.
- Development of existing portions of the real estate portfolio with deliverable cash flow in fiscal 2024/2025.
- Office rationalization and subleasing at the entire Christ Cathedral campus in 2023/2024 for 4,000 sq ft and 2024/2025 for 8,000 sq ft.
- Development of a South County cemetery in the next 7 to 10 years.
- Revenue-generating events on campus to offset ongoing operating expenses.

**Outcomes:**

- a. Set and achieve mortuary revenue targets.
- b. Increased number of real estate development projects completed, on time and on budget.
- c. Rental income targets set and achieved.
- d. Increase Christ Cathedral campus revenues by approximately 50% annually.

**Goal 7**

**Strengthen stewardship giving throughout the Diocese through established foundations (Orange Catholic and Our Lady of La Vang). Ensure all diocese philanthropy is aligned with Mission, Vision, and Strategic Plan priorities as approved by the Ordinary. Conduct a Diocese-wide fundraising initiative for a school endowment within five years.**

- Create and implement a plan for lower socio-economic elementary schools.
- Develop and execute short-term financial solvency plans for at-risk schools.
- Continued support of Our Lady of La Vang (OLLV) Foundation fundraising for St. Callistus and ensure results.
- OCF to develop and execute short-term and long-term fundraising strategies for schools and priests' retirement.

**Outcomes:**

- a. Create the plan early in in fiscal year 2023/2024
- b. Implement plan in quarter 3 of 2023/2024 which includes solving the financial gap for the 2023/2024 plan.

**Goal 8**

**Make the Christ Cathedral campus welcoming to all the faithful. Transform the campus into a global destination for Catholics, other Christians, and pilgrims worldwide.**

- Grow the hospitality team and upgrade the room reservation software (IMPAK).
- Increase the number of featured exhibits (Shroud, Notre Dame, etc.).
- Establish greater outreach and accessibility to Catholic organizations, parishes, and schools.
- Add a food/coffee shop to the campus.

**Outcomes:**

- a. Increase number of events held on campus by 25%
- b. Hold an exhibit with 7500 annual visitors
- c. Increase Catholic organization and parish participation by 25%.
- d. All efforts to transform the Cathedral Campus in place by Q1 in 2024/2025
- e. Anticipate revenue growth of \$500k in 2023/2024 and up to \$2M by 2026/2027.

**Goal 9**

**Support evangelization and faith formation through each Diocesan department. Mentoring the teams, providing financial oversight, and engaging with Diocese initiatives.**

**Outcome:**

Ensure budget discipline throughout the Diocese and adequate funding of the strategic plan within budget constraints. Track results and recommend changes as appropriate.

## VIII. Implementing Project Siempre Adelante, the Updated Diocesan Strategic Plan

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A Strategic Plan is not meant to be static but is a living document that must be adapted and changed. While implementation is the most important step in strategic planning, it can often be the most challenging step. It is important to remember that implementing a strategic plan is not a one-time event but a continuous journey. Regularly reviewing progress, adapting to changing circumstances, and maintaining a focus on the Diocese's long-term vision are integral components of this journey.

In order to facilitate the implementation of the Strategic Plan, a Siempre Adelante Strategic Plan Coordinator has been named to oversee the effort. The coordinator will monitor the achievements of plan objectives, organize Siempre Adelante Planning Group meetings, report progress, and facilitate training as needed.

This plan was not created to sit on a shelf but to be a living witness of the good work of the Diocese of Orange. As people of faith, we have been commissioned by Our Lord to grow His Church and thrive through the Holy Spirit. Let us remember that continued prayer and discernment will be crucial to the implementation of Project Siempre Adelante.

A sincere thanks to all those who have participated in the creation of Project Siempre Adelante, 2023 revision of the 2018 Diocese of Orange Strategic Plan. As we enter the implementation phase of the plan, may we be inspired by the words of St. Junipero Serra, "God is powerful and can call great things out of nothing."

May the Holy Spirit continue to guide and unite us, and may God continue to bless us with His grace.

## Appendix A- Planning Team Members

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Bishop Timothy Freyer	<i>Auxiliary Bishop, Diocese of Orange</i>
Fr. Angelos Sebastian	<i>Vicar General, Diocese of Orange</i>
Dr. Erin Barisano	<i>Superintendent of Catholic Schools, Diocese of Orange</i>
Armando Cervantes	<i>Director of Hispanic Ministry &amp; Youth and Young Adult Ministry, Diocese of Orange</i>
Jarryd Gonzales	<i>Director of Communications and Marketing, Diocese of Orange</i>
Deacon Steve Greco	<i>Director of Evangelization and Faith Formation, Diocese of Orange</i>
Fr. Miguel Hernandez	<i>Pastor of St. Joseph Church, Placentia</i>
Kathleen Khoury	<i>Director of Human Resources, Diocese of Orange</i>
Fr. Martin Hiep Nguyen	<i>Pastor of La Purisima Church</i>
Fr. Tuyen Nguyen	<i>Pastor of Blessed Sacrament Church</i>
Joan Patten, AO	<i>Delegate for Consecrated Life, Diocese of Orange</i>
Steve Pellegrini	<i>Chief Financial and Administrative Officer, Diocese of Orange</i>
Fr. Vincent Pham	<i>Director of the Vietnamese Catholic Center</i>
Fr. Daniel Reader	<i>Former Chancellor, Diocese of Orange</i>
Fr. Bao Tai	<i>Rector of Christ Cathedral Parish</i>
Tom Greeley	<i>Co-Project Lead</i>
Dr. Dennis Galligani	<i>Co-Project Lead</i>
Darren Kaya	<i>Project Consultant and Research Associate</i>
Oralia Ruvalcaba	<i>Executive Assistant to CFAO, Diocese of Orange</i>

## Appendix B- Work Group Leaders and Members

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### Parishes and the Mission of the Diocese (Faith Formation & Evangelization)

#### Co-Chairs:

- Deacon Steve Greco, *Director of Evangelization and Faith Formation*
- Fr. Tuyen Van Nguyen, *Pastor Blessed Sacrament Catholic Church*

#### Members:

- Katie Dawson, *Director of Parish Evangelization and Faith Formation*
- Fr. Patrick Moses, *Pastor Saint Timothy Church*
- Fr. Juan Navarro, *Parochial Vicar Christ Cathedral*
- Deacon Phong Nguyen, *Deacon Blessed Sacrament Catholic Church*
- Fr. Christopher Tuan Pham, *Parochial Vicar Blessed Sacrament Catholic Church*
- Sister Cecilia Pham, *Blessed Sacrament Catholic Church*
- Deacon Miguel Sanchez, *Deacon Blessed Sacrament Catholic Church*
- Sister Cynthia Velasco, *Blessed Sacrament Catholic Church*
- Fr. Douglas Zavala, *Parochial Vicar Blessed Sacrament Catholic Church*

### Youth and Young Adult Outreach

#### Co-Chairs:

- Armando Cervantes, *Director of Hispanic Ministry & Youth and Young Adult Ministry*
- Joan Patten, AO, *Delegate for Consecrated Life*

#### Members:

- Sr. Mariana Duenas, MESST, *Vocations Liaison and Youth Organizer for Hispanic Christian Family Movement in Spanish*
- Wendy Encinas, *Young Adult ministry leader at St. Mary's in Fullerton*
- Paola Flores, *Volunteer Coordinator of Confirmation at Our Lady of La Vang, St. Joseph, SA, and young adult ministry efforts at Christ Cathedral*
- Benito Medrano, *Coordinator of young adult ministry, outreach, and programming*
- Fr. Michael D. Nguyen, *Parochial Administrator at Santa Clara de Asís, Yorba Linda*
- Fr. Aristotle Quan, *Parochial Vicar, San Francisco Solano Church*
- Laura Schuberg, *Coordinator of youth ministry, outreach, and programming*
- Matt Zemanek, *Director of Adult Evangelization & Formation at St. Timothy, Laguna Niguel*

### Catholic School Identity

#### Chair:

- Erin C. O. Barisano, Ed. D, *Superintendent of Catholic Schools*

#### Members:

- Steve Cameron, *Executive Director, Orange Catholic Foundation*
- Joe Ciccoianni, *Principal, St. Norbert School*
- Stella Costello, *Principal, St. Irenaeus School*
- Rev. Martin Hiep Nguyen, *Pastor, La Purisima Church*
- Carol Reiss, *Lower School Principal, St. Junipero Serra School*
- Brendan Ronan, *VP Mission & Catholic Identity, Servite High School*

- Sr. Johnellen Turner, *President, St. Catherine's Academy*
- Denise Valadez, Ed. D., *Associate Superintendent*
- Patrick Visconti, *AP Mission Integration, Santa Margarita High School*

## **Governance and Communications**

### **Co-Chairs:**

- Jarryd Gonzales, *Head of Communications*
- Kathleen Khoury, *Director of Human Resources*

### **Members:**

- Linda Ji, *Director for Family Life*
- Neil Kessler, *Director of IT*
- Fr. Vincent Pham, *Director of the Vietnamese Center*
- Deacon Tom Saenz, *Director, Office of the Permanent Diaconate*
- Fr. John Shimotsu, *Pastor, St. Anne's Church (Seal Beach)*
- Brad Snyder, Ed.D., *Associate Superintendent, Orange County Catholic Schools*
- Fr. Michael St. Paul, *Pastor, Holy Trinity Church*

## **Financial Resources and Stewardship**

### **Co-Chairs:**

- Fr. Angelos Sebastian, *Vicar General*
- Steve Pellegrini, *Chief Financial and Administrative Officer*

### **Members:**

- Steve Cameron, *Executive Director, Orange Catholic Foundation*
- Fr. Miguel Hernandez, *Pastor, St. Joseph Church, Placentia*
- Anthony Jung, *Director of Pastoral Center Finance, Diocese of Orange*
- Fr. Duy Le, *Pastor, San Francisco Solano Church*
- Deacon Nick Sherg, *Business Manager, St. Joseph Church, Placentia*
- Mike Wesner, *Director of Cemeteries, Diocese of Orange*

## Appendix C- Interviews Conducted

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### **Diocese of Orange Staff Interviewed**

- Bishop Timothy Freyer, *Auxiliary Bishop*
- Bishop Thanh Thai Nguyen, *Auxiliary Bishop*
- Dr. Erin Barisano, *Superintendent of Catholic Schools*
- Armando Cervantes, *Director of Youth and Young Adult Ministry, Dir. of Hispanic Ministry*
- Fr. Brandon Dang, *Director of Priestly Vocations*
- Ernie Garcia, *Director of Parish and School Finance*
- Jarryd Gonzales, *Director of Diocesan Communications and Marketing*
- Deacon Steve Greco, *Director of Evangelization and Faith Formation*
- Fr. Miguel Hernandez, *Pastor of St. Joseph Church, Placentia*
- Andy Hoover, *Former Director of Real Estate Management*
- Anthony Jung, *Director of Pastoral Center Finance*
- Fr. Michael Khong, *Chancellor and Interim Director of Priests Personnel*
- Kathleen Khoury, *Director of Human Resources*
- Fr. Martin Hiep Nguyen, *Pastor of La Purisima Church*
- Fr. Tuyen Nguyen, *Pastor of Blessed Sacrament Church*
- Alma Ochoa, *Assistant Director of Cemeteries*
- Joan Patten, AO, *Delegate for Consecrated Life*
- Fr. Vincent Pham, *Vietnamese Catholic Center Director*
- Steve Pellegrini, *Chief Financial and Administrative Officer (CFAO)*
- Fr. Daniel Reader, *Former Chancellor*
- Fr. Angelos Sebastian, *Vicar General & Moderator of the Curia*
- Fr. Bao Thai, *Rector of Christ Cathedral*
- Mike Wesner, *Director of Catholic Cemeteries*

### **Diocese of Orange Affiliates Consulted**

- Steve Cameron, *Executive Director, Orange Catholic Foundation*
- Sr. Katherine 'Kit' Gray, CSJ, *Sisters of St. Joseph of Orange*
- Dr. Elysabeth Nguyen, *Chief Executive Officer, Our Lady of La Vang Foundation*
- Ellen Roy, *Executive Director, Catholic Charities*

### **Personnel From Other Dioceses**



- Sr. Pat Boyle, *Associate Director of Pastoral Planning*, **Archdiocese of Boston** – Pastoral Plan
- Michael Laird, *Director of Missionary Planning*, **Archdiocese of Milwaukee** – Pastoral Plan
- Tim Hunt, *Executive Director of Planning and Mission Effectiveness*, **Archdiocese of Seattle** – Pastoral Plan
- Greg Richmond, *Superintendent of Catholic Schools*, **Archdiocese of Chicago** – School Sustainability Plan
- Dcn. Sean Costello, *Superintendent of Catholic Schools*, **Archdiocese of Detroit** – School Sustainability Plan
- Lara Schuler, *Director of Catholic Education*, **Archdiocese of Oklahoma City** – School Sustainability Plan
- Ward Jones, *Chief Operating Officer*, **Diocese of Arlington** – Strategic Plan

### **Additional Individuals Consulted**

- Jim Luisi, *Leadership Consultant*, *Catholic Leadership Institute*

### **Other Dioceses Researched**

Diocese of Bridgeport – School Sustainability Plan

Diocese of Lansing – Strategic Plan

Diocese of Green Bay – School Sustainability Plan

Diocese of St. Augustine – Strategic Plan

Diocese of Toledo – Strategic Plan