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The Episcopal Diocese of Chicago

Strategic Planning Initiative: Discovery Phase Report

Strategic Planning Approach

A strategic planning process is a spiritual discernment process that enables a diocese to hear and answer God's call anew by engaging in deep self-reflection while also analyzing the changing context of its ministry. It helps to focus the diocese's life together in ways that will have the greatest impact possible over the next 18-60 months.

This process moves in three phases, estimated to take about 12 months in total: (1) a discovery phase, (2) a discernment phase, and (3) an implementation phase.

In the first phase, the work is to listen deeply: where do we have strengths that we should build on? What should we improve for the sake of our witness? What new ministries can we imagine? What should we lay down that no longer serves the needs of our churches or our communities? From this listening, we hope to hold up a mirror to the diocese so that it can see itself in familiar – and new – ways.

While the whole process is about discernment, in the second phase, that work becomes central. If we have listened well in our discovery process, then how do we sense the Spirit leading us? Where do we feel energy and passion among our leaders, churches, and communities? Among all that what we can imagine, what is feasible? Of all that we might need, what is realistic within a 5-year timeline? When we hold questions like these, what emerges over time are a constellation of strategic priorities that we believe will help us live into the vision to which God is calling us.

The discerning work continues as we translate those priorities into meaningful goals, timelines with benchmark measures, and budget proposals; this more granular work is no less about discernment. It is the translation of the vision into the practical.

The third phase of the process is the hardest, requiring the people of the diocese to realign their life together with their discerned priorities. In the implementation phase, diocesan staff portfolios change; committees and task forces are reimagined. Some ministries will end. Time spent in convention changes to reflect our strategic priorities. The challenge, of course, is that former ways of working and longstanding ways of being shift slowly. We must commit to moving consistently and pastorally through the implementation phase as we move closer to the vision we have discerned.

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Summary of Discovery Process Findings

In November 2024, Saison Consulting began our work with The Episcopal Diocese of Chicago on such a process. The discovery phase began in earnest in December 2024 and continued through April 2025. It consisted of a HolyCow! Survey which was completed by more than 900 people in the Diocese, 30 individual interviews, and 10 focus group conversations including one with Spanish-language interpretation and one with American Sign Language interpretation. 70 people participated in these focus group conversations. Additionally, every member of the diocesan staff was interviewed, some multiple times. The significant number of people who participated in the discovery phase of this process is a sign of hope.

From our first conversations, it was evident that the Diocese is in a particularly precarious place, needing a strategic plan not only to help orient its ministries and recover a sense of shared purpose but also to chart for its leaders a path to stability to sustainability to thriving. This was confirmed in the results of the HolyCow! survey, which identified that the people of the Diocese display low energy/low satisfaction, an erosion of morale over time, and a loss of clear alignment and a lack of a shared vision. HolyCow! names organizations which demonstrate these characteristics as being in what they term the "Reinvention / Recovery" quadrant.

Critical in this assessment are those words *over time*. The Diocese's current condition is the result of years – decades, even – of decisions or lack of decisions, actions or inactions, that now have combined in ways that jeopardize the future viability of the Diocese. What Diocesan leaders choose to do in the next 6-12 months will be vital for its future health, vitality, and even viability. The data suggest that there are a significant number of members of the Diocese who are "'on the fence' waiting to see what happens next." Should Diocesan leaders fail to act in this season in decisive, meaningful, and responsible ways, the data suggest – and from the interviews, we can imagine – an unparalleled loss of support. We should note that this urgency complicates the strategic planning horizon of 18-60 months. That said, one hopeful dimension of being in the "Reinvention / Recovery" quadrant is that people can imagine the Diocese being different.

Our work in the interviews and focus group conversations was to nuance the data received through the HolyCow! survey and our initial interviews. We received strikingly consistent feedback from clergy, retired clergy, lay leaders, and Diocesan staff:

- **Challenges Facing the Diocese**: In both interviews and focus groups, people frequently highlighted the significant challenges facing the Diocese and its congregations, including financial difficulties (deficits, dwindling funds, lack of transparency, and difficulty securing loans), declining membership, clergy burnout

and isolation, and an aging and fatiguing congregational base. There's a perceived disconnect between the Diocese and its congregations, particularly those in rural or less central areas, and a feeling that smaller, struggling churches are often simply left to die. Often, when people spoke about the Diocese they said “they” not “we.”

- **Role and Desired Support from the Diocese**: Many individuals believe that the Diocese should primarily function as a support system for local congregations rather than as a "super-parish" or a top-down authority. They desire resources for congregational development, help with operational issues (like HR, payroll, IT), and clearer communication about what the Diocese offers congregations and leaders. There's a strong call for the Diocese to foster connection and collaboration among churches and clergy, and to provide pastoral care for clergy. Some emphasize the need for the Diocese to be more outwardly-focused, engage with contemporary issues, and actively promote growth, especially among youth and in multicultural communities.
- **Leadership and Culture**: There are mixed sentiments regarding the bishop's leadership. While many appreciate Bishop Paula's pastoral presence and acknowledge her health challenges, many express concerns about her availability, visibility, stamina, and perceived inability to make difficult decisions or lead significant change. There's a desire for clearer vision and more direct leadership from the bishop, as well as a more collaborative and less "top-down" approach from Diocesan staff. Related, several people mentioned a lack of trust in financial leadership and a need for greater accountability and transparency within diocesan structures. The culture is described by some as being in "denial" about historical issues and current decline.
- **Diocesan Convention and Gatherings**: A recurring theme is the strong preference for in-person Diocesan conventions over virtual ones. Clergy and laity alike believe that in-person gatherings are crucial for building relationships, fostering collegial spirit, and creating a sense of shared identity and belonging within the Diocese. The online format is seen as "undermining," and contributing to a "congregationalist mentality." There's a desire for these gatherings to be more engaging, less focused solely on business reports, and provide more opportunities for connection and shared learning.

We summarized these observations and other things we learned in our report to the Diocesan strategic planning group in this way:

- Congregations are struggling. Congregations of every size need resources and ways of connecting to resources.
- Diocesan staff are perceived as being most helpful in transition or crisis. Even in these situations, the experience of support is uneven.
- Clergy are beaten down – feeling isolated and burnt out.
- Many lay people have lost hope.

- The Diocese has a history of undermining its own importance.
- The financial situation is perceived to be near catastrophic, and there is real empathy, anger, and distrust about finances.
- There is a perceived lack of transparency, particularly around diocesan finances.
- Most want diocesan staff to prioritize supporting local ministry.
- Most people are dubious about the strategic planning process.
- Bishop Clark is loved and respected. People want to support her vision.
- Bishop Clark was elected to be a change agent.
- There are widespread concerns about Bishop Paula's health and capacity to do this work.
- The people of the Diocese still want real change but are running out of patience.
- "Status quo" and "stay the course" are simply not options.

Recommendations

Based on what we heard, the following are some short-term, immediate impact recommendations that we encourage implementing as soon as possible:

- Hold convention – or some part of it – in-person.
- Communications:
    - Prioritize relationship. Connected is better than perfected.
    - Spotlight resources.
    - Bring visibility to the staff and its wisdom.
    - Tell stories – and not just the good ones.

Further, we heard a constellation of common priorities for your life together:

- Reweave the fabric of relationships within the Diocese.
- Pursue financial sustainability with transparency and accountability.
- Focus on congregational development and vitality.
- Identify, equip, and empower leaders throughout the Diocese.
- Support ministries to children and youth.
- Encourage social outreach and prophetic witness

Further, we suggest that the Diocese adopt ways of working together that

- Center people as the priority.
- Prioritize equity and justice in all ways of working.
- Shore up basic services before pursuing experiments and innovations.
- Use the convening power of the Diocese in creative and catalytic ways.
- Practice transparency and accountability.
- Redirect resources back into the Diocese, particularly the bishop's time.
- Enhance the deanery system to provide mutual support.

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Next Steps

On May 10, the Diocesan Strategic Planning team met at the Diocesan offices for conversation and discernment. They engaged this report and began the process of discerning strategic priorities. Since then, Saison consultants have been in conversation with Bishop Clark and the staff, using the feedback above to begin discussions that will lead to a refinement of the strategic priorities identified on May 10 that will ultimately shape the next 3-5 years of mission in the Diocese of Chicago. We next will be engaging participants from the Discernment Retreat in continued refinement of this work. We hope to soon be able to provide to the entire diocese a draft of a Vision Statement with clear strategic priorities for your reflection and further discernment.

A Note: We'd like to thank everyone who has participated in the strategic planning process to date. We are grateful to Bishop Clark and diocesan staff members Crystal Plummer, Jen Boyle-Tucker, TJ Houlihan, Andrea Mysen, and Gracey Van Spankeren for their wisdom, time, and energy to support this work. We are grateful for all of you who took the HolyCow! survey and participated in listening sessions and for the amazing group of people who attended the day-long discernment retreat in May.