

A FIVE-YEAR PLAN FOR THE COMPANIONS OF ST. LUKE

Inspired by the Way of Christ and the Rule of St. Benedict



Proposed to Chapter

June, 2022

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Today's Companions of St. Luke, Order of St. Benedict

A Current Snapshot of Our Community



Our Mission and Vision

The Companions of St. Luke (CSL) was formed to exemplify Benedictine spirituality and practices under the Rule of St. Benedict in a manner consistent with the times in which we live. We are committed to the rule's core tenet of *preferring nothing whatever to Christ*.

The CSL charism, our mission and vision enfolded by the Holy Spirit, continues to be a life devoted to Christ in constant prayer, in sacred reading, and in service.

Benedictine Spirituality

As Benedictines, we promise to fulfill our threefold vows of fidelity to monastic life, stability, and obedience. These vows have been defined by many monastics over the ages and reflect the spiritual journeys of those individuals and communities who have gone before us. We are called to embrace the vows as our own as we listen to God and one another with open hearts and minds and pursue a life often viewed as countercultural.

Our Community

Founded in 1992, the CSL is a dynamic and dispersed Christian Community established under the canons of The Episcopal Church of the United States and is a society in communion with the See of Canterbury. The CSL is independent of any other religious order or community and is identified as a non-profit entity.

The CSL is guided by the principles of simplicity and hospitality and of balance and moderation expressed in the Rule of St. Benedict. Although we do not own a monastery, through a vigorous formation program each member has learned to be in a "monastery of the heart," where each of us practices the discipline of prayer, study, and work in our own homes and daily lives.

Monastic Life and Fellowship

The CSL community, as an expression of new monasticism, serves as a witness to the wider church and world while helping members on their individual spiritual journeys. Members gather together for worship, prayer, study, and fellowship both in person twice a year as guests at a monastery or by video conferencing and related technology-based options between the semi-annual convocations.

Convocations center around praying the Divine Office (four daily services in the Episcopal *Book of Common Prayer*), sharing of the Eucharist, celebrating special church calendar days and member spiritual-growth milestones, and enjoying fellowship at mealtimes and otherwise when meeting in person.

Members and Leadership

The CSL includes about 45 baptized members: 3/4 vowed members who are Episcopalians or Anglicans; and 1/4 oblates who may be from other denominations. Members represent a diverse demographic of men and women who may be married or partnered as well as celibate. They live in places dispersed across the United States and beyond; are young and old; and have a range of life experience as teachers, lawyers, doctors, bankers, nurses, clergy, administrators, firefighters, students, homemakers, and retired people.

Guidance and leadership of the CSL is provided by our community's superior (who provides administrative and spiritual leadership), together with appointed and elected members (the CSL Council), and our core documents that include the Rule of St. Benedict and the CSL's Constitution and Customary (nature of community and expected practices). In addition, as a Christian Community authorized by The Episcopal Church, the CSL has a bishop visitor who serves as a key bridge between the CSL and the greater church.

Resources and Service

Our commitment to the contemplative form of religious life is complemented by our individual forms of service that help to heal a wounded world, while respecting the dignity and rights of all, meeting distance-learning formation expectations, and honoring our threefold monastic vows.

The CSL is dependent on the initiative of all members to contribute to development of a nurturing community and to achieve shared interests. It is a goal that all CSL members will support, and be supported by, the community's efforts to manifest Benedictine principles and spirituality through their prayers, talents, and financial resources in a manner that balances their individual financial obligations and personal growth needs with the needs of the community and care for God's creation.

Annual member pledges are not considered as membership dues but as thank-offerings for God's generosity in bringing us together to love and serve Christ in all.



An Unadorned Version of the CSL's Charism

"Our mission is to be Benedictines as a dispersed monastic community.
Our vision is to prefer nothing to Christ".

Five-Year Plan Overview

The 2020-2022 pandemic brought to light the need to consider how our dispersed, monastic community, the Companions of St. Luke (CSL), has changed since its founding in 1992. This force of nature has helped us to see how we can meet the challenges and opportunities that have surfaced within the CSL and religious communities in recent years as a call to build on the best of the Benedictine tradition while moving closer to the true light that is Christ.

Strategic Direction

Our five-year plan serves as a bridge between our charism and action. It is aligned with our mission and vision included in the *Current Snapshot of Our Community* and is designed to help prepare the Companions for the future as we continue to be inspired by the Way of Christ and the Rule of St. Benedict.

Strategic and Action Planning. Over the span of about eight months, a 16-member CSL planning group worked with current community members to prepare the heart of the five-year plan – a strategic framework and preliminary action plan – and to review and refer the completed five-year plan to the CSL Council for its consideration and approval after necessary changes were made.

The planning group, appointed by the CSL's Abbot and representing a range of backgrounds, met as part of a collaborative and classic planning process for nonprofits that was adapted to meet the unique nature of our religious community. A result of this process was the development of objectives to address needs in four focus areas. These objectives were further analyzed by planning subgroups that worked in parallel and interactively as they did additional analysis and drafted action plans with more specific items proposed for subsequent refinement and implementation by the Council – upon approval of the five-year plan at a Chapter meeting of the CSL membership.

Expected Outcomes

One expected outcome of this plan is a more proactive and coordinated approach by our community to meet the needs identified for the priority focus areas. God willing, we will be witnesses in the larger world for Benedictine spirituality and values that include hospitality and serving the common good, while contributing to the sustainable growth and well-being of our members and community. A corollary outcome is that we will respond to unanticipated events and needs by consulting our core documents, and, most importantly, by trusting God and truly listening to and caring for one another.

Measurable Results. These loftier expected outcomes are complemented and grounded by ten objectives with more specific outcomes and eighteen associated proposed action items with measurable results. To ensure this five-year plan is implemented and does not become an abstract exercise, the CSL Council will oversee further definition of the action items and delivery of them within a realistic and designated timeframe. Adjustments to the plan, based on the collective wisdom and support of the full membership, are anticipated along the way,

Framework for Community Well-Being

One of the blessings of being Benedictine Christians is our common bond and commitment to the Benedictine rule of life. This source of inspiration is a wellspring to draw from as we move forward as a dynamic and dispersed community with members at different stages of monastic formation. As we continue to evolve as the CSL, it is important that we are able to identify issues that we need to address and harness the energy and imagination within our community to become what God wants us to be. This five-year plan presents a framework for us to do so.

Four Priority Focus Areas

Building on the reports of work groups to the CSL Chapter in May of 2021 about issues that surfaced within our community, the Abbot identified four priority areas of focus and a timeframe within which to build a five-year plan that addresses these and related issues in a coordinated and purposeful way. The four areas of focus are: *Spirituality and Services*; *Inreach and Outreach*; *Formation and Community Development*; and *Finance and Sustainability*. These four areas were further assessed after idea-generation and rank-ordering of a range of options by the planning group and CSL membership.

Needs Statements. Mission statements, provided here, for the first two focus areas relate to supporting spiritual practices and healthy relationships to strengthen the community as a relevant and dynamic witness of Benedictine spirituality and hospitality for both its members and partners. Statements for the other two areas relate to program refinements for the foundational areas of member formation and financial resources that support stable and sustainable development of our community.

- ❖ ***Spirituality and Services Focus*** – To enhance and improve the ways in which CSL members live out our essential Benedictine principles of prayer, sacred reading, and service.
- ❖ ***Inreach and Outreach Focus*** – To foster mutually-supportive relationships, provide coordinated communication resources, and explore Benedictine-based outreach with our parishes and others.
- ❖ ***Formation and Community Development Focus*** – To facilitate the formation of new members, the ongoing development of existing members, and the sustainability of our dispersed monastic community.
- ❖ ***Finance and Sustainability Focus*** – To provide improved financial management and stewardship of budgets and resources invested for the near- and long-term common good and purpose of our CSL religious community.

These mission statements provide charism-led guidance for the more specific identification of needs and associated objectives and proposed action items developed as part of the planning process. The focus area needs are summarized in the following four narratives.

Spirituality and Services Needs. The overarching objective of the Spirituality and Services focus area is to enhance and improve the ways in which CSL members live out our essential Benedictine principles of prayer, sacred reading, and service. These principles are included in our constitution, customary, and formation manuals that strive to connect our Benedictine vows or promises of stability, obedience, and fidelity to monastic life with our baptismal promises to seek and serve God in all we do.

Prayer, sacred reading, and service as forms of devotion to Christ and our charism occur in a myriad of ways by CSL members as dictated by their state in life. Our diverse and dispersed community needs to continually find ways to improve and enhance the way these spiritual practices are expressed and shared both individually and together as part of the everchanging body of Christ.

New ways for expression are identified by three objectives and four action items related to earmarked discussions about the essentials, expanded prayer services, and more options for online and in-person fellowship and sharing. Dedicated time to explore Benedictine spirituality together is proposed for inclusion at ongoing spring and fall convocations that are an important time for members to gather in-person to pray, celebrate, study, and grow in fellowship. Additional online prayer services (such as centering prayer) and fellowship time before and after all online services will support the vitality of our existence as a dispersed community with limited opportunities for in-person interactions. An improved public and private social media and website presence will also allow members to communicate on a more frequent basis and to share materials of community interest. And, creation of regional gatherings (with reduced time commitments and decreased travel demands) will supplement the semi-annual convocations by providing opportunities for additional face-to-face interactions among members.

It is expected that implementation of the proposed enhancements will occur between 2022-2027. They will address the needs identified above as well as less visible concerns such as unease with use of technology and social media or an inability to attend onsite gatherings for various reasons. Providing a range of online and in-person alternative ways to live out the Benedictine essentials will strengthen our community life and spirituality. Improvements will occur not only in the next five years but will carry forward for years to come and will enhance our ability to be an even more relevant and dynamic witness of Benedictine spirituality as a dispersed monastic community.

Inreach and Outreach Needs. The objectives for the Inreach and Outreach focus area are important individually and collectively. They contribute to the definition and development of this undefined (until now) and eclectic CSL area that supports a fundamental value expressed in the Rule of St. Benedict – Hospitality. This, in turn, is reinforced by our constitution and customary that call us to ‘rise to the challenge of developing mutually-supportive relationships and healthy communications about shared community interests’. Both ‘in-person and technology-based communication vehicles are to be maintained and to be made available for the community.’ In addition, the sections related to community and spiritual leadership highlight the need to ‘develop and maintain mutually beneficial connections with The Episcopal Church and other Christian or Benedictine communities to ensure the CSL is a viable member of and witness for the body of Christ’.

These broad and somewhat lofty expectations are especially timely to embrace because of issues that surfaced in 2020-2021 and need to be addressed if we are going to thrive as a post-pandemic and

dispersed community with a shifting demographic. Specifically, CSL work groups identified the need, among others, for support of members unable for various reasons to fully participate in community offerings; improved clarity and coordination of information delivered through an almost dazzling array of communication options; and movement from basic interactions or connections to real relationships that reinforce that as Benedictines we help one another navigate this changing world.

The three inreach, communications, and outreach objectives and related six proposed action items are concrete ways to make real progress toward meeting the needs identified above. The first objective proposes development and offering of both a pastoral support network and issue-resolution options for members facing diverse pressures or limitations. The second objective identifies a way of presenting ‘who/ what the CSL is’ to facilitate delivery of coordinated and clear communications and it also proposes installation of needed technology platforms to facilitate and enhance meetings and completion of essential CSL work. The third objective encourages both re-engagement with religious community partners to share ideas and resources and development of an outreach program with our local parishes to share the gifts of Benedictine spirituality. *Collectively*, a pastoral support network, issue resolution options, a clearer CSL identity, and renewed NAECC membership can be expected from 2022-2024; and upgraded technology and a Benedictine-program for parishes can be delivered from 2024-2026 – as steps along the way to realizing our potential as a Spirit-filled monastic community.

Formation and Community Development Needs. Our community exists for the express purpose of living a religious life committed to following the Rule of St. Benedict, translated in part by our Customary. Although we do not live in a shared brick and mortar building, we live in a ‘monastery of the heart’ through which we serve in the school for the Lord’s service while we seek to know Christ more fully.

Formation is foundational for our ‘school for the Lord’s service’ (*The Rule of St. Benedict*, Prologue v. 45) and the ongoing vitality of our community. The 2020-2022 pandemic has highlighted for us the need to support one another along our spiritual pathways and has reminded us of our potential as a dispersed and diverse community to offer ‘God seekers’ an alternative to traditional religious communities. Just as with other areas in the community, our Formation Program needs to be reevaluated and updated to reflect the times that we are in now while honoring and learning from our history as an innovative monastic community. That reevaluation began in 2021 through work groups that identified specific areas for improvement, including living out the reality that formation is a ‘Journey of a Lifetime’ that includes life-professed/promised members and continuing education. In addition, although the CSL has relied on curriculum and distance-based formation in the past, expanded use of technology and new online and group-based approaches to learning are significant opportunities for the formation of our community and of all members. Learning is primarily a self-motivated exercise but it can be enhanced through shared experiences that encourage discussions and foster study and ideas for additional formation learning opportunities.

Two objectives (related to Formation and Community Development) and four associated proposed action items resulted from the assessment of needs referenced above. Implementing these over the next five years will address areas of needed improvement. Concrete changes to expect are: revision and posting of chapters of our formation manual (including one related to life after taking solemn-vows or promises); on-going training of formation guides and members participating in our programs (including

use of a group-based forum series); development of a ‘virtual’ education center to provide offerings for members that go beyond the basic formation program; and preservation of our community’s history (in a way that can be used for communications with potential inquirers and others and for continuing learning within the CSL).

These actions will help us build on our foundation and the best of our good and innovative formation program for the benefit of our current and future members called to follow the Rule of St. Benedict.

Finance and Sustainability Needs. The overarching objective of this focus area is to provide improved financial management and stewardship of budgets and resources invested for the near- and long-term common good and purpose of our CSL religious community. This mission reflects an assessment of needs that concluded our community is positioned well financially to help the CSL transition to the next phase of our development as a witness for Benedictine spirituality and the Way of Christ.

Sound financial management practices (consistent with expectations of The Episcopal Church) need to be maintained as a basic foundation for our membership to enhance existing worship, communications, formation, and finance programs. Importantly, the current planning effort has identified the need to not only make improvements in these areas but to strengthen our community overall by better coordinating and filling in ‘opportunity gaps’ between these areas. These opportunities include focusing on our core commitment to Benedictine spirituality that will allow us to transition from conventional communications to development of deeper relationships among our members and with others. An additional opportunity includes learning from our rich history to fulfill our potential as a dispersed, vital, and adaptive community while balancing available resources through multi-year planning.

To meet these needs, two objectives and four action items are proposed for implementation from 2022-2027. The scope of the first objective relates to development of balanced five-year budgets (adjusted annually) that meet both near- and mid-term work needs that are supported by funds from the wise use of member donations and endowments guided by an investment strategy. The budgets are to meet authorized current work as well as priority additions related to the action items proposed to strengthen the four focus areas. The second objective relates to provision of accountable financial management and associated policies and procedures. Anticipated improvements include implementation of independent financial report recommendations and development of a multi-year budget planning process. This process is expected to have broader member participation and to determine an effective balance of available people, time, and financial resources to meet both current and future community needs.

The bottom line: Value will be added to the CSL’s solid financial basis by investing sustainably over the next five years and beyond in our membership and charism, with specific improvements proposed for worship, communications, formation, and finance programs in a coordinated and purposeful way – with the whole community becoming more than the sum of its parts.

Key Objectives

Flowing from the focus areas are ten objectives, A through J, derived from ideas reviewed by the full membership before being further developed by the planning subgroups. These key objectives serve as bridges between the charism-related mission statements and targeted activities that are linked to

measurable results to be achieved from 2022-2027. The following chart summarizes the objectives and related expected outcomes identified to meet the needs described in the preceding narrative statements. This chart is followed by an overview of the Plan for Action and an abbreviated list of proposed action items for CSL implementation. Implementation of the Plan for Action will complete the loop and put into practical terms our charism as expressed in our constitution and customary.

Spirituality and Services

Objective A. Advance a common understanding of essential Benedictine principles that bond and inspire us as individuals and as a monastic community.

Expected Outcome: Earmarked discussions at our CSL gatherings will be held, beginning 2023.

Objective B. Expand and enhance our range of on-line worship, prayer, and study offerings to further support collective and individual spiritual practices.

Expected Outcomes: Expanded worship and prayer options will be added to the CSL calendar in 2023. Options to post offerings will be available, beginning 2023.

Objective C. Continue to provide in-person convocations *and* offer regional gatherings that include expanded options for fellowship, worship, prayer, and study opportunities.

Expected Outcome: Regional options will be provided to supplement and enhance semi-annual convocations, beginning 7/2023.

Inreach and Outreach

Objective D. Provide inviting and accessible pastoral support and issue resolution options for members that improve CSL relationships and participation.

Expected Outcomes: A member-support program will be available by 6/2024. Issue resolution options will be identified by 6/2023.

Objective E. Convey the essence of our community for members, potential inquirers, and partners in a coordinated array of communication tools supported by updated technology platforms.

Expected Outcomes: CSL's core identity will be presented in an impactful way by 6/2023. Needed software will be installed by 6/2025.

Objective F. Reach out to our religious community partners and local parishes as we explore and share the gifts of Benedictine spirituality with them.

Expected Outcomes: CSL NAECC membership will be revitalized by 6/2023. A parish outreach program will be piloted by 6/2025.

Formation and Community Development

Objective G. Provide an updated member formation manual, expand the group-forum series for those in formation, and develop a continuing education program for all members.

Expected Outcomes: Updated manuals for members in formation and formation guides *and* a new program for life-long members will be available by 2025; the current online formation series will be expanded for those in formation and others by 2023; and a continuing education program will be piloted for all members by 2026.

Objective H. Continue to document our history as a dispersed Episcopal-Benedictine community and incorporate information into CSL communications and continuing education opportunities.

Expected Outcomes: Important information will be located and preserved while sources still exist and will be shared with our members and interested stakeholders by 2023 and continuing.

Finance and Sustainability

Objective I. Annually coordinate a five-year budget, ensuring stability and sustainability while balancing new and expanded program needs with available pledges and endowment funds.

Expected Outcomes: Annual budgets will include funds for prioritized new and ongoing CSL work, beginning FY 2023. Financial investment and stewardship strategies will be updated by 6/2024.

Objective J. Continue to strengthen financial processes and procedures in support of improved CSL work programs.

Expected Outcomes: Implementation of approved independent financial report recommendations will begin in FY 2022-23. A multi-year budget process will be developed collaboratively by 6/2023+.

Plan for Action, 2022-2027

The proposed action plan presented in the Appendix for this five-year plan is an integrated version of the draft action plans developed by the planning subgroups for consideration by the Council and its implementation work groups. The Plan for Action includes achievable results in the near- and mid-term. This plan for action is essential to our Five-Year Plan, as the proposed action items are grounded and concrete responses to the call for change while remaining true to the three-fold Benedictine vows of stability, obedience, and fidelity to monastic life. A list of the abbreviated action items is provided in the table below.

❖ Near-Term (beginning 2022-2024)	❖ Mid-term (beginning 2025-2027)
Spirituality and Services Items	Spirituality and Services Items
○ Sponsor Benedictine forums at convocations	
○ Expand online services	
○ Provide public and private sites to post materials	
○ Offer regional gathering opportunities	
Inreach and Outreach Items	Inreach and Outreach Items
○ Provide pastoral support network	
○ Offer issue resolution options	
○ Clarify CSL identity via brand profile	○ Update priority technology platforms
○ Re-engage with community partners (ex., NAECC)	○ Offer RB-spirituality program for parishes
Formation and Community Development Items	Formation and Community Development Items
○ Update formation manual and add new chapter(s)	○ Pilot continuing education program
○ Expand forum-series for guides, formands, and others	○ Develop digitized archive of CSL history
Finance and Sustainability Items	Finance and Sustainability Items
○ Coordinate annual budgets within 5-year scope	○ Develop multi-year budget planning process
○ Implement approved independent financial report items	○ Update investment and stewardship strategies

Implementation and Modification of the Plan

This five-year plan will be effective only to the extent to which it is implemented and reflects the ongoing nature and needs of our community and its members. Any modifications of the plan will be determined by the Abbot and the Council as the implementation of the plan proceeds and the Council determines and monitors what is needed to ensure delivery of the action items. It is expected that work groups consisting of Council-designated members will be charged with supporting the annual delivery of measurable results through programs and targeted items or tasks supported by the CSL's budgets and available resources. These resources include input from CSL members, affiliated partners, and the core documents identified elsewhere in this document.

Review and Approval of the Five-Year Plan

As a Benedictine community with a dispersed and diverse demographic, it was essential that the full membership of the CSL be involved with the development of the five-year plan from its early stages to its final approval. For example, after the preliminary strategic framework was developed by the planning group (1/3 of the CSL's membership), it was forwarded to the other members for consideration and prioritization of proposed objectives. An amazing 85% of those contacted responded. Later, input was also sought as part of development of the action plan.

Since the planning group was acting on behalf of the larger membership, the Abbot emphasized the importance of keeping the membership informed and ensuring that member input was solicited throughout the planning process. Examples of information sharing include reports and discussion as part of online quarterly Chapter meetings and periodic newsletter articles.

Upon completion of draft action plans by the four planning subgroups, an integrated five-year plan was reviewed and recommended by the full planning group to the CSL Council for its consideration and identification of needed adjustments. The Council subsequently accepted the plan in April, 2022 and recommended it for approval by the Chapter. The plan was included on the agenda for the June, 2022 Chapter meeting for discussion and final approval.

Ultimately, the plan is for our community – comprised of individuals. It is important that we all (with the support of the Holy Spirit acting within and among us) apply this plan and its growth opportunities as one way to get closer to realizing our charism as The Companions of St. Luke, Order of St. Benedict.

Plan Contributors

The Companions of St. Luke continue along the Way forged first by Christ and then by many monastics over the ages. As members of a dispersed form of new monasticism, each with lives that pull us in many directions, may the bond that brought us together as ‘God-seekers’ in the Order of St. Benedict remain paramount as we work together for the common good along our individual spiritual journeys.

We are grateful for the opportunity that this five-year plan has provided us to listen to one another and to the needs of our community as we continue to strive to be better witnesses in a wounded world and for our vows of stability, obedience, and fidelity to monastic life.

Companions of St. Luke Directory, 2021-2022

Life Professed

Br David Gerns, Abbot^{1,2}
Br Matthias Smith
Sr Anna Grace Madden^{1,2}
Br Camillus Converse
Sr Martha Lamoy, Prior^{1,2}
Br Robert Cotton¹
Sr Mary Francis Deulen
Br Dunstan Townsend
Br Steven Olderr¹
Br Thomas Anthony Goddard
Br Anskar Nonken²
Sr Catherine Ann Ballinger¹
Sr Toni Sylvester¹
Br Chrysostom Olsen^{1,2}
Br Raymond Escott¹
Sr Joanna Whitworth
Sr Julian Smith-Boyer¹
Br Gregory Tatchell^{1,2}

Annually Professed

Sr Karen Elizabeth Evans
Sr Margaret Mary Bergeron¹
Sr Clara Ulson Freirias
Sr Mary Magdalene Clarke¹
Sr Katherine Fleck
Sr Ànah Elizabeth Marshall
Sr Genevieve Lynn Robinson

Novices

Br Florian Campbell
Sr Petra Puckett¹
Sr Cecilia Horton
Br Peter Francis Kyle²
Sr Marie Patricia Hughes
Br John David Wynne¹

Spiritual Support

The Right Rev. Alan Scarfe,
Bishop Visitor
The Rev. Sidney Breese, Chaplin

Postulants

Robin Smith
William Page
David-Mark Campbell

Oblates

Sr Brigid Gerns
Br Daniel Moore²
Sr Denise Moore
Br Michael Anicetus McCabe
Br James Rafael Davies¹
Sr Hildegard Longmire

Novice Oblates

Jeffrey Kasica
Kevin Orth
Adam Wilson

¹Five-Year Planning Work Group member. In addition, all Companions had the opportunity to contribute as Chapter members.

²CSL Councilmember.

Available Resources

This five-year plan would most likely be a blank document if it were not for stimulating thoughts provided by CSL members as well as our partners and other stakeholders. Although the CSL is independent of any other religious order or community, we are very much dependent on others beyond the walls of our ‘virtual monastery’ and on the flow of information and documents available, including those used to guide the development and preparation of this plan. What follows is a brief list of key partners and documents consulted as part of the current CSL planning process.

Partners and Stakeholders

The Episcopal Church (TEC). See <http://episcopalchurch.org>. Episcopalians believe in a loving, liberating, and life-giving God. As constituent members of the Anglican Communion in the United States, we are descendants of and partners with the Church of England and the Scottish Episcopal Church, and are part of the third largest group of Christians in the world.

National Association of Episcopal Christian Communities (NAECC). See <https://www.naecc.net>. NAECC is a network of religious communities (including the Companions of St. Luke, Order of St. Benedict) within The Episcopal Church which require its members to follow a rule of life and to be under appropriate ecclesial authority. It helps to articulate the mission and ministry of Christian Communities to the larger Church.

Benedictine Interest Groups. See, for example, *Being Benedictine in the 21st Century Conference Report* @ <http://www.beingbenedictine.org> and *The American Monastic Newsletter*, June 2021. Also see Anglican Benedictine Confederation (ABC) – Facebook: A space for Anglican Benedictines around the world both traditional and dispersed to discuss common affairs.

Core Documents

The Rule of St. Benedict. Our rule of life provides the basis and framework for our community. Several publications of the Rule are available. See, for example, the on-line *Opus Dei* application provided in *Our Offering* section of the Companions of St. Luke (CSL) website: www.csl-osb.org.

The Constitution and Customary of the CSL. The Rule of St. Benedict is translated by our constitution and customary into terms that speak to the nature and expected practices of our community. They were most recently updated and issued to the CSL members in September, 2020 and are also available in the community’s formation manuals. Copies of these documents are available by contacting the Abbot.

CSL Chapter Reports. The CSL currently holds quarterly, on-line Chapter meetings to conduct business, including hearing reports from various committees and work groups. Chapter meeting reports for May and October, 2021 are especially relevant for this plan, as they speak to issues related to worship, communications, member formation, and finance. Minutes of the meetings, together with reports identified on the agendas, are on file with the CSL Prior.



Appendix

Below is a summary of the Plan for Action prepared for consideration by the CSL Council and proposed for implementation from 2022-2027. The targeted action items and associated implementation steps (to be identified) will achieve real change for the priority focus areas and are expected to address needs essential for the well-being and sustainability of our community.

Spirituality and Services Action Plan

<p>Objective A. Advance a common understanding of our essential Benedictine principles that bond and inspire us as individuals and as a monastic community.</p> <p>Expected Outcome: Earmarked discussions at CSL gatherings will be held, beginning 2023.</p>	<p>Action Item: Hold earmarked, semi-annual forums at convocations to discuss Benedictine life, vows/promises, practices, etc.</p> <p>Result: 2-hour segments with changing topics in spring and fall are provided, with recorded segments for those not able to attend.</p> <p>Timeframe: FY 2023 and continuing.</p>
<p>Objective B. Expand and enhance our range of online worship, prayer, and study offerings to further support collective and individual spiritual practices.</p> <p>Expected Outcomes: Expanded worship and prayer options will be added to the CSL calendar, beginning 2023. Options to post offerings will be available, beginning 2023.</p>	<p>Action Item: Expand online services to include semi-quarterly centering prayer and seasonal/special feast day services.</p> <p>Results: CSL calendar includes centering prayer and special feast-day semi-quarterly options. Fellowship opportunities enhance our life in community and, in turn, our individual and collective spirituality.</p> <p>Timeframe: 2023 and continuing.</p>
	<p>Action Item: Continue to develop our renewed public and private Facebook sites. Working with our website vendor, create a dedicated, private website section for member offerings that may include photos, homilies, music links, etc.</p> <p>Result: Secure sites with guidelines are established for member offerings that support our Benedictine mission.</p> <p>Timeframe: Facebook – 2023 and continuing. Website – mid-2024 and continuing.</p>
<p>Objective C. Continue to provide in-person convocations <i>and</i> offer regional gatherings that include expanded options for fellowship, worship, prayer, and study opportunities.</p> <p>Expected Outcome: Regional options will be provided to supplement and enhance semi-annual convocations, beginning 7/2023.</p>	<p>Action Item: Explore member interest in sponsoring regional gatherings to augment fellowship, worship, prayer, and study opportunities provided by convocations.</p> <p>Result: Research about interest and available locations is conducted for CSL partially-funded options that increase accessibility for in-person gatherings.</p> <p>Timeframe: 7/2023 with follow-up as appropriate.</p>

Inreach and Outreach Action Plan

<p>Objective D. Provide inviting and accessible pastoral support and issue resolution options for members that improve CSL relationships and participation.</p> <p>Expected Outcomes: A member-support program will be available by 6/2024. Issue resolution options will be identified by 6/2023.</p>	<p>Action Item: Offer a Benedictine-inspired form of pastoral support for and by members within defined guidelines.</p> <p>Result: A network (based on a model of compassionate support of the inner person) is piloted with trained CSL caregivers.</p> <p>Timeline: FY 2023-24.</p>
	<p>Action Item: Present issue resolution tips and visual examples for members to use for a range of situations.</p> <p>Result: A tip-sheet and illustrative video (by the CSL) to resolve issues are available.</p> <p>Timeline: FY 2022-23.</p>
<p>Objective E. Convey the essence of our community for members, potential inquirers, and partners in a coordinated array of communication tools supported by updated technology platforms.</p> <p>Expected Outcomes: CSL's core identity will be presented in an impactful way by 6/2023. Needed software will be installed by 6/2025.</p>	<p>Action Item: Develop and share a brand profile for the CSL and its members to faithfully communicate our identity to potential inquirers and local parishes.</p> <p>Result: A CSL profile (developed with assistance of a nonprofit brand consultant) is available for application to communication products.</p> <p>Timeline: FY 2022-2023.</p>
	<p>Action Item: Identify and install technology platforms to meet the range of CSL member and group technology infrastructure needs.</p> <p>Result: Priority needs are confirmed and software (such as Microsoft Teams) to facilitate meetings and project management is installed.</p> <p>Timeline: FY 2023-2025.</p>
<p>Objective F. Reach out to our religious community partners and local parishes as we explore and share the gifts of Benedictine spirituality with them.</p> <p>Expected Outcomes: CSL NAECC membership will be revitalized by 6/2023. A parish outreach program will be piloted by 6/2025.</p>	<p>Action Item: Contact and re-engage with our religious community partners to share ideas and resources.</p> <p>Result: Active participation in NAECC is renewed (while considering additional mutually-beneficial memberships).</p> <p>Timeline: FY 2023-2024.</p>
	<p>Action Item: Develop and offer a Benedictine-spirituality program for parishes delivered by trained CSL liaisons.</p> <p>Result: A pilot program, in collaboration with TEC and local parishes, is offered by CSL liaisons (e.g., a repurposed Companion Associates group).</p> <p>Timeline: FY 2023-2025.</p>

Formation and Community Development Action Plan

<p>Objective G. Provide an updated member formation manual, expand the group-forum series for those in formation, and develop a continuing education program for all members.</p> <p>Expected Outcomes: Updated manuals for members in formation and formation guides <i>and</i> a new program for life-long members will be available by 2025; the current online formation series will be expanded for those in formation and others by 2023; and a continuing education program will be piloted for all members by 2026.</p>	<p>Action Item: Update the formation manual, with revisions for postulants, novices, and junior-professed; and include a new chapter for the life-professed and long-term oblates to support the concept of ‘Journey of a Lifetime’.</p> <p>Result: Revisions are made concurrently and introduced (by secure online postings) as each chapter is completed.</p> <p>Timeframe: FY 2022-25.</p>
	<p>Action Item: Enhance group-forums by expanding the list of topics, presenters, and presentation methods and software.</p> <p>Result: Online courses for cohorts are used as part of an emerging online formation program.</p> <p>Timeframe: FY 2023 with follow-up as appropriate.</p>
	<p>Action Item: Develop and pilot a continuing education ‘virtual’ center and related resources for all members.</p> <p>Result: A center is developed based on surveyed interests and needs beyond basic formation and to support other CSL programs.</p> <p>Timeframe: FY 2026 and continuing.</p>
<p>Objective H. Continue to document our history as a dispersed Episcopal-Benedictine community and incorporate key information into CSL communications and continuing education opportunities.</p> <p>Expected Outcomes: Important information will be located and preserved while sources still exist; and information about our monastic community will be shared with our members and interested stakeholders by 2023 and continuing.</p>	<p>Action Item: Continue to digitize archived records from the founding of our community through the present and organize the information for selected applications.</p> <p>Result: Archived records are being digitized for 1992-2022 and will continue for subsequent years; and major milestones will be identified for use in our website, newsletters, education center courses, etc.</p> <p>Timeframe: 2023 and continuing.</p>

Finance and Sustainability Action Plan

<p>Objective I. Annually coordinate a five-year budget, ensuring stability and sustainability while balancing new and expanded programs with available pledges and endowment funds.</p> <p>Expected Outcomes: Annual budgets will include funds for prioritized new and expanded CSL work, beginning FY 2023. Financial investment and stewardship strategies will be updated by 6/2024+.</p>	<p>Action Item: Annual budgets within a multi-year framework and Council-authorized priorities are prepared and presented for approval at annual Chapter meetings.</p> <p>Result: Annual budgets are coordinated with 5-year plan implementation in a sustainable way.</p> <p>Timeline: FY 2023 annual budget and following.</p>
	<p>Action Item: Implement updated financial investment and stewardship strategies that provide funds and support for CSL needs.</p> <p>Results: Updated strategies reflect a balance of growth and stability. Pledging and member support reflect new stewardship guidelines and training. Use of endowment funds reflect criteria developed for their wise and targeted use.</p> <p>Timeline: FY 2024 and annually.</p>
<p>Objective J. Continue to strengthen financial processes and procedures in support of improved CSL work programs.</p> <p>Expected Outcomes: Implementation of approved independent financial report recommendations will begin by 6/2022. A multi-year budget process will be developed collaboratively by 6/2023+.</p>	<p>Action Item: Incorporate approved independent financial report recommendations related to CSL financial practices and policies.</p> <p>Result: Changes agreed by Council and Finance Committee are implemented.</p> <p>Timeline: Improvements begun FY 2022.</p>
	<p>Action Item: Develop a near and mid-term planning process to factor in evolving budget needs and funding.</p> <p>Result: A collaborative planning process is developed that includes both historical trends and forecasted needs and reflects updated financial policies and procedures.</p> <p>Timeline: FY 2023 annual and 5-year budget and following;</p>

Notes

The bottom of the page features several overlapping, semi-transparent blue geometric shapes, including triangles and polygons, creating a modern, abstract design.

The Companions of St. Luke
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