

Year-Two of CSL Five-Year Plan Implementation

The Five-Year Plan was adopted by Chapter in June 2022 and its implementation began with the guidance of the Council in July. *This January 2024 chart provides a summary of the second year's proposed efforts* that incorporate recent CSL leadership changes and refinements to the plan that reflect progress made for both continuing work and new initiatives. The chart includes 'next step' tasks for each of the four focus areas (Worship, Communications, Formation, and Finance). It also includes 'spaces' to identify task leaders and 2024 budget needs, as they become known, to help ensure human and financial resources exist to achieve year-two tasks associated with implementing the 5-year plan.

Worship and Convocation Committee Oversight of Listed Tasks

Action Items (in 2022 plan)	Progress July 2022 -> Dec. 2023	2024 Proposed Tasks
<ul style="list-style-type: none"> Sponsor Benedictine spirituality forums at convocations. 	Preliminary list of discussion topics 'brainstormed' at 10/22 convocation. Clergy role and EfM ministry topics discussed with targeted subgroups, 6/23. Refresher 'walkthrough' offered regarding Daily Offices prayed in harmony, 10/23.	Lead – TBD; coordinate with Continuing Education rep. Tasks – Develop 2024 convocation topics for discussion related to RB. Discuss and update <i>Rituale</i> (conversion reference, presenters, jubilee definition). Budget Request - TBD (for ex., communications contractor hours needed for <i>Rituale</i> file)
<ul style="list-style-type: none"> Expand online services. 	Wednesday zoom-based vespers added to calendar, eff. Qtr 1'23. Rubrics for <i>Opus Dei</i> app added for 6/23 convocation and zoom services. Quarterly calendar includes new and continuing member-leaders of online services.	Lead -Calendar coordinator and prayer leaders. Tasks - Include centering prayer 'note' on zoom screen during silence prior to vespers; coordinate with communications zoom-rep. Coordinate with continuing education rep regarding tips/practices for praying the psalms in harmony. Budget Request – TBD
<ul style="list-style-type: none"> Offer regional gathering opportunities. 	Initial ideas sought/expressed at and following fall '22 convocation. Member volunteers sought fall '23 to research specific options.	Lead - TBD from task group of regional reps. Tasks -Develop/recommend options for both regional gatherings and options for new venue for Fall convocations, consistent with Abbess provided parameters. Budget Request - TBD
<ul style="list-style-type: none"> ○ <u>NB</u>: Facebook item transferred to communications area during 2023 (see below). 		
<p>Note 1. The Worship Committee chair is Br Anskar. Other committee members include Br Dunstan, Sr Catherine Ann and Br James Rafael. Sr Madeleine Sophie (as convocation coordinator) provides support for the committee and Sr Mary Magdalene provides a calendar for member leaders of online daily office services. Other committee or task members TBD as needed. The superior is an ex officio member of the committee. The Communications technology-support group provides livestreaming and zoom services for convocations and online prayer.</p> <p>Note 2. The Worship Committee has been requested by the Finance Committee to provide input about the CSL's core mission so that the multi-year budgets are charism-driven. The multi-year budgets are to contain funds to maintain on-going program responsibilities and funds to support 5-year plan initiatives, as identified by the tasks outlined above. Budget requests are to be submitted to the Finance Committee by November 1 of each year.</p>		

Communications and In/Outreach Committees' Oversight of Listed Tasks

Communications Action Items	Progress July 2022 -> Nov. 2023	2024 Proposed Tasks
<ul style="list-style-type: none"> Clarify CSL identity via brand profile [related to its use for coordinated communications]. 	Brand profile developed/included as website update in 2022 as ' <i>CSL at a Glance</i> ' menu tab. Communications task leaders and preliminary committee members identified by 10/23.	Lead – Communications Committee task leaders. Tasks - Coordinate and support current communication resources, including list_serv, zoom and hybrid services, and public/private Facebook sites. Work with Outreach task group to provide updated CSL profiles for online sites and trifold brochure consistent with ' <i>CSL at a Glance</i> ' for use at TEC convocations. Provide support, as requested, for Newsletter generation. Budget Request - TBD
<ul style="list-style-type: none"> Update priority technology platforms. 	Website and <i>Opus Dei</i> contractors replaced and related apps upgraded during Qtr 1-3, 2023. Webcitz funding for 2024 design time approved Qtr 4, 2023.	Lead – Technology support group, including Br. Florian and Business Manager. Tasks - Work with new contractors and other Committees regarding needed edits. Compensate CSL members for device/app support (ex, list-serv, zoom, Wufoo) and transfer personal ownership to CSL by 8/2024. Improve livestreaming of convocation services. Budget Request - TBD
In/Outreach Action Items	Progress July 2022 -> Nov. 2023	2024 Proposed Tasks
<ul style="list-style-type: none"> Provide pastoral support network for CSL members. 	Pastoral and confidential support effort assigned to Prior Escott and Br Daniel (7/1/23); private contacts made, 3 rd qtr. Weekly prayer-list provided by prayer-list coordinator for community use supplements the pastoral support service available. Card ministry at 10/23 convocation begun for absent members.	Lead – Committee co-chairs Tasks – Continue to support CSL pastoral support and prayer-list providers. Note availability of CSL chaplain at convocations. Provide 'cards' to members as follow-up to 2022 member-support subcommittee discussions; and continue 'card ministry' initiative begun at 10/23 convocation. Budget Request - TBD
<ul style="list-style-type: none"> <u>NB:</u> Spiritual direction and issue resolution resource links transferred to F&E area during 2023 (see below). 		
<ul style="list-style-type: none"> Re-engage with community partners (ex., NAECC, ABC). 	Limited attendance by CSL reps at NAECC and ABC online meetings in 2023; future commitment TBD.	Lead – TBD Tasks – Provide CSL trifold for TEC conference (see above). Coordinate with Abbess and communications re NAECC subscription and CSL profile, TEC Redbook, and Praesidium (SC) listings, & profile on other online sites. Budget Request - TBD
<ul style="list-style-type: none"> Offer RB-spirituality program for parishes. 	Item deferred for 1-2 years. CSL member ministry support may be more viable near-term approach/focus.	Lead – Committee Co-chairs Tasks - Re-initiate discussions in 2024 with Superior and Bishop Visitor about Benedictine/Lucan ministry/ messages between CSL community/members and local parishes. Build on Religious Life Sunday as bridge to TEC Budget Request - TBD
<p>Note 1. The Communications Committee chair is Br Florian. Committee members include Br Ronan and Br Jude Thaddeus, and others TBD as needed. Br David serves as a transition advisor and Br John David serves as a FB assistant administrator. The superior is an ex officio member of both the Communications and In/Outreach committees.</p> <p>Note 2. The In/Outreach Committee chair is Sr Mary Magdalene, eff. 12/23. She is to be supported by co-chair Sr Catherine Ann and outreach members Br Jude Thaddeus and Sr Julian. Additional in/outreach members are to be identified in early 2024. Sr Mary Francis is the CSL's prayer-list provider, Br Raymond provides pastoral support, Br Anskar is the Safe Community training coordinator, and Fr Sid Breese is the CSL's chaplain.</p>		

Formation and Education Committee Oversight of Listed Tasks

Action Items	Progress July 2022 -> Nov. 2023	2024 Proposed Tasks
<ul style="list-style-type: none"> Update formation manuals and add new chapter(s). 	<p>Formation Guide Manual issued 1/23 and discussed with Formation Guides 10/23. Edits of 2021 version of Formation Manual are in process. Manual theme is 'Journey of a Lifetime'; RB excerpts used to develop theme.</p>	<p>Lead - Formation Curriculum subcommittee</p> <p>Tasks – Update FG Manuals; and all Professed-Life Manual chapters by June convocation. Update Oblate Manual during 2024.</p> <p>Budget - \$250 technical assistance.</p>
<ul style="list-style-type: none"> Expand forum-series for guides, postulants and novices; and pilot continuing education program, including: <ul style="list-style-type: none"> a. Archived CSL history <i>[moved task here for future use as an educational offering.]</i> b. Spiritual direction and Issue resolution options <i>[task de facto transferred from In/Outreach area for future offerings.]</i> 	<p>Basic online classes offered '22-23 are being reviewed as well as results of two surveys conducted Qtr 1, 2023 related to additional educational resources to be developed. Advent book study included Sunday discussions and mid-week comments.</p> <p>a. Appointed archivist continues to assemble files, to be stored with TEC option.</p> <p>b. SD resource offered to members via FB and Issue Hotline # included in Newsletter. More focused development deferred until can be included with formation/continuing education topic development.</p>	<p>Lead - Educational Resources subcommittee</p> <p>Tasks – Work with formation deans and presenters to provide basic on-line classes, offered to all members. Develop additional special topic catalog based on prior surveys conducted. Offer online Lent book study and Summer/Fall discussion forums of topics identified by the Superior.</p> <p>Budget - \$300 for external resource + dollars to support communications-related services for online classes and for TEC archive storage.</p>
<ul style="list-style-type: none"> <i>New formation-related initiative inserted related to supporting member transitions from entry to life-long membership.</i> 	<p><i>Feedback provided in mid-2023 from new members and those moving from one formation stage to another identified the need for more support and clarity.</i></p>	<p>Lead - Welcoming Receptions subcommittee</p> <p>Tasks - Provide first-convocation orientations. Provide additional support for transitions between formation stages. Celebrate oblate and professed member jubilee and other anniversaries.</p> <p>Budget Request - Habits and name tags (\$1000); Orientation items (\$500); Anniversary items (\$520).</p>
<p>Note. The Formation and Education Committee is chaired by the three deans of formation: Sr Julian (Professed Life); Sr Genevieve Lynn (Continuing Education); and Br James Rafael (Oblates). They are joined by Br John David, Sr Marie Patricia, Sr Catherine Ann, and Br Jude Thaddeus (who represent professed and oblate members, curriculum developers, educators, and communicators). The Abbess is an ex officio member. Three subcommittees, effective 12/23, and supported by several task groups are: Formation Curriculum, Educational Resources, and Welcoming Receptions. The committee will be coordinating and working in partnership with other CSL programs.</p>		

Finance and Investment Committees' Oversight of Listed Tasks

Action Items	Progress July 2022 -> Nov. 2023	2024 Proposed Tasks
<ul style="list-style-type: none"> Implement approved independent financial report items. 	Independent financial report items received by finance committee are being redefined for CSL application. Financial reports finalized Q3 2023. Financial structure, policies and job descriptions approved by Council 9/23. After approval (Q1 '24) financial management policy is to be included as an appendix in the CSL's Customary.	Lead - Finance Committee's Treasurer, supported by Business Manager. Tasks – Provide regular financial reports to Council and Chapter. Determine annual review needs/provider. Budget –TBD
<ul style="list-style-type: none"> Coordinate annual budgets within 5-year scope & Develop multi-year budget planning process 	Budget moved to calendar year basis; 2023 and beyond includes 5-year time frame. Four 5-Year Committees asked to provide budget requests by mid-November for 2024 budget approval by Council and Chapter.	Lead - Finance Committee Tasks - Work with other 5-yr implementation committees to identify budget requests consistent with the adopted financial management framework and in support of the CSL's charism. Budget – Present updated 5-year budget to Council each Dec. and to Chapter each Jan.
<ul style="list-style-type: none"> Update investment and stewardship strategies 	Reorganization of finance area includes charism-driven finance and investment committees. Joint meeting of Finance and Investment committees about coordinated budget approach and needs was scheduled for 12/23.	Lead - Investment Committee, working with Treasurer. Tasks - Develop a policy statement that defines the purpose of the investment accounts. Monitor the performance of our investments and recommend changes if necessary. Work with the Finance Committee to determine the need for either investment support for the budget or additional funding for the investment account. Budget – Assist in developing an updated 5-year budget to Council each December.
<p>Note 1. The Finance Committee is chaired by the CSL's interim treasurer, Br David, and supported by the Business-Manager, Sr Mary Magdalene. Additional committee members are Br Gregory and Br Jean-Baptiste.</p> <p>Note 2. The Investment Committee is chaired by Br Robert. Additional members are Sr Anah Elizabeth and Br James Rafael. The committee is supported by the Interim Treasurer and Business Manager. The superior is an ex officio member of both the Finance and Investment committees.</p> <p>Note 3. The Finance Committee has asked the Worship Committee to provide input regarding the CSL's core mission (charism) to ensure that the CSL's budget and investment efforts are mission-driven.</p>		