**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. ThisSeptember 2024 chart provides a summary of the second year’s efforts that incorporate 2023-24 CSL leadership changes and refinements to the plan and reflect significant 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 Jul 2022 -> Sep 2024** | **2024 Proposed Tasks**  |
| * Sponsor Benedictine spirituality forums at convocations (and online).
 | Initial list of discussion topics ‘brainstormed’ at 10/22 convocation. Clergy role and EfM ministry topics discussed with targeted subgroups, 6/23. Refresher ‘walkthrough’ to pray Daily Offices in harmony, 10/23 and 6/24. RB/3-vows zoom-based discussion sponsored by abbess and facilitated by continuing education area occurred via multiple sessions, 8/24. | **Lead –** TBD; coordinate with Cont Education rep.**Tasks –** Develop 2024 convocation topics for discussion related to RB. Discuss and update *Rituale* (conversion reference, presenters, jubilee definition).**Budget Request -** TBD (for ex., communications contractor hours needed for *Rituale* file) ; Contractor $ used for *O.D.* app updates in ‘24; further O.D. language and Rites updates deferred until ’25.  |
| * Expand online services.
 | Wednesday zoom-based vespers added to calendar, eff. Qtr 1’23 and Friday vespers added, eff. Qtr 3’24. Rubrics for daily offices in *O.D.* app added for 6/23 convocation and zoom services. Quarterly calendar includes new and continuing member-leaders of online services. Daily prayer notice automated for faster/easier posting. Daily Office antiphons updated by contractor 4/24, based on prior liturgy work group input. St Benedict Feast Day vespers, 7/11/24, included reception of new members and celebration of jubilee anniversaries. Options for more inclusive language for Vespers requested by abbess from worship committee. | **Lead** -Calendar coordinator and prayer leaders.**Tasks -** Include time for fellowship and silence prior to vespers. Provide tips/practices for praying the psalms in harmony. Receive new members and celebrate jubilee anniversaries at special vespers for those unable to attend convocation. Address member requests for use of more inclusive language for evening vespers.**Budget Request –** See note above, re contractor $ for updates to Opus Dei app. |
| * Offer regional gathering opportunities.
 | Initial ideas sought/expressed at and following fall ’22 convocation. Member volunteers sought fall ’23 to research specific options. Research conducted for northeast and midwest regions in 2nd Qtr ’24. Use of Conception Abbey in Oct ‘24 is likely to be last gathering at this site; new site for 6/25 and regional sites for subsequent Octobers are expected to be identified, beginning in 2025 | **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. Prepare for change of Midwest venue for June convocation.**Budget Request-** Include added costs expected for new meeting venues. |
| * NB: Facebook item transferred to communications area during 2023 (see communications chart below).
 |
| **Note 1**. The Worship Committee chair is Br Anskar (thru 9/30/24). Other committee members include Br Dunstan, Sr Catherine Ann, Sr Jana Lynn, and Br James Rafael. Sr Madeleine Sophie (as convocation administrator) provides support for the committee; and Br Ronan provides the 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. **Note 2.** The Worship Committee has been requested by the Finance Committee to provide input about 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 and following. Budget requests are to be submitted to the Finance Committee by November 1 of each year. |

**Communications and Outreach Committees’ Oversight of Listed Tasks**

|  |  |  |
| --- | --- | --- |
| **Communications Action Items** | **Progress July 2022 -> Sep 2024** | **2024 Proposed Tasks** |
| * Clarify CSL identity via brand profile [related to its use for coordinated communications].
 | Brand profile developed/included as website update in 2022 as ‘*CSL at a Glance’* menu tab. Communications task leaders and preliminary committee members identified by 10/23.Discussions between new Outreach leadership and communications reps re development of brochure and FB messaging begun 2nd Qtr ’24. FB sites clarified CSL focus and provided updated CSL photo 3rd Qtr ’24. Member Directory issued in July. Newsletter restarted with August ’24 edition. | **Lead** – Communications Committee task leaders.**Tasks -** Coordinate 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 ‘*CSL at a Glance’* for use at TEC convocations. Provide support, as requested, for Newsletter generation. Abbess appoint CSL member to maintain Directory, eff. 2/25.**Budget Request-** TBD |
| * Update prioritytechnology platforms.
 | Website and *Opus Dei* contractors replaced and related apps upgraded during Qtr 1-3, ‘23. Webcitz funding for 2024 design time approved Qtr 4, ‘23. Website and *Opus Dei* updates made by contractors in 1st/2nd Qtrs ’24, with content provided by worship and formation task groups. Researched switch from zoom-based to YouTube technology for 6/24 convocation. Opus Dei app updates made for convocation in June ’24. Livestream technology introduced in June needs further refinement.  | **Lead** – Technology support group, including Br. Florian and Business Manager.**Tasks -** Work with new contractors and other Committees regarding needed edits. Improve livestreaming of convocation services. Compensate, as needed, CSL members for device/app support (ex, list-serv, zoom, Wufoo) and transfer personal ownership to CSL by 8/2024. Provide CSL-funded zoom sites for CSL meeting and leaders’ use by end of ’24.**Budget Request-** TBD |
| **Outreach Action Items** | **Progress July 2022 -> Sep 2024** | **2024 Proposed Tasks**  |
| * Provide pastoral support network for CSL members.

 *NB: CSL members providing prayer-list, card ministry, and pastoral care support have effectively reported to the superior since 6/23.* | Pastoral and confidential support effort assigned to Prior Escott and Br Daniel (7/1/23); private contacts made, 3rd Qtr, et seq, including acknowledgement of member losses and related grief. Weekly prayer-list provided by prayer-list coordinator for community use supplements the pastoral support service available. Prayer lists, used for evening vespers and individual prayer, have become a key link for member connections. Card ministry at 10/23 convocation begun for absent members. Postcards sent from 6/24 convocation.  | **Lead** – Office of the superior**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 |
| NB: Spiritual direction and issue resolution resource links transferred to F&E area during 2023 (see below). |
| * Re-engage with community partners (ex., NAECC, ABC).
 | Limited attendance by CSL reps at NAECC and ABC online meetings in 2023; future commitment TBD. 2024 NAECC subscription paid; Abbess and Outreach chair to reconnect with group in ’25. Outreach committee member made keynote presentation at Anglican Benedictine Confederation (ABC) Aug ’24 online gathering. | **Lead –** Committee Chair**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 |
| * Offer RB-spirituality program for parishes.

*NB: Initial item as proposed is being redefined; updated focus/tasks to occur by 2025.*  | CSL member ministry support may be more viable near-term approach/focus than original focus identified in 2022.New Outreach Committee chair has been collating available information re prior CSL outreach efforts; and is to informally conduct survey of members after 6/24 convocation regarding future outreach focus. Redefinition and research re member and CSL community ministry continues. | **Lead –** Committee Chair**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 |
|  **Note 1**. The Communications Committee chair is Br Florian. Committee members include Br Ronan, Br Jude Thaddeus, Br David, and others TBD as needed. Br John David now serves as the Newsletter coordinator and editor. Br David will partner with contractor to maintain Opus Dei and website until 10/25. The superior is an ex officio member of both the Communications and Outreach committees.  **Note 2.** The Outreach Committee chair, Sr Mary Magdalene (eff. 12/23), is in the process of redefining the committee’s focus and committee membership. Transition support is provided by Sr Catherine Ann, Br Jude Thaddeus, and Sr Julian. Effectively reporting into the office of the superior to provide member support are: Sr Mary Francis, the CSL’s prayer-list provider; Br Raymond and Br Daniel, available to provide pastoral support; and Fr Sid Breese, available as CSL’s chaplain. |

# Formation and Education Committee Oversight of Listed Tasks

|  |  |  |
| --- | --- | --- |
| **Action Items** | **Progress July 2022 -> Sep 2024** | **2024 Proposed Tasks** |
| * Update formation manuals and add new chapter(s).
 | Formation Guide Manual discussed with Formation Guides 10/23; update issued 1/24. Updated 2021 version of Professed and Oblate Life Formation Manuals issued 5/24. Manual theme is ‘Journey of a Lifetime’; RB excerpts used to develop theme. Annually-professed members assist as cohort-group discussion facilitators, effective 7/24. | **Lead -** Formation Curricula task groups**Tasks –** Update FG Manuals; and Professed & Oblate-Life Manuals by June convocation. Develop cohort-group discussions, facilitated by annually-professed members.**Budget** - $250 technical assistance. |
| * Expand forum-series for guides, postulants and novices; and pilot continuing education program, including:

a. Archived CSL history *[moved task here for future use as an educational offering.]* b. Spiritual direction and Issue resolution options [*task de facto transferred from In/Outreach area* for future offerings.]c. Safe church/community training coordination transferred to continuing education area, 6/24.  | Basic online classes offered ’22-23 are being reviewed as well as results of two surveys conducted Qtr 1,‘23 related to needed education and community engagement options. Draft program framework prepared 1st Qtr ’24. Advent ’23 and Lent ’24 book studies included Sunday discussions and mid-week comments. Abbess-sponsored and continuing education facilitated CSL-wide online Summer discussion series re the three Benedictine vows was offered in Aug ’24. The Summer Study, focused on the RB, will be an annual event.a. Appointed archivist continues to assemble files, to be stored with TEC option.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.c. Praesidium training assistance became available for new and other members at 6/24 convocation, et seq. | **Lead** – Education and Community engagement task group**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 and new surveys conducted. Offer: Online Advent and Lent study options; Summer discussion forum of topics identified by the Superior; and new Winter ‘game night for all members’.**Budget** - $300 for external resource + dollars to support communications-related services for online classes and for TEC archive storage.  |
| * *New formation-related initiative inserted related to supporting member transitions from entry to lifelong membership.*
 | *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.* Transition meetings added to year-end reviews of member work, eff. 2nd Qtr ’24. Eff. 6/24, new members at their first convocation oriented/assisted by Novice-members. Formation guide or dean to be present at all rites. Jubilee anniversary ‘gifts’ procured for June ’24 convocation to acknowledge members with more than 10 years as professed-life or full oblate membership. | **Lead** - Welcoming Receptions task groups**Tasks -** Provide first-convocation orientations. Provide additional support for transitions between formation stages. Celebrate oblate and professed member jubilee and other anniversaries. Partner with porters to explore need for inquirer info sessions. **Budget Request -** Habits and name tags ($1000); Orientation items ($500); Anniversary items ($520). |
| **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 (Oblate Life). They are joined by Sr Catherine Ann, Sr Marie Patricia, Sr Clare, 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), supported by several task groups are: Formation Curricula, Education and Community Engagement Options, and Welcoming Receptions. The committee will be coordinating and working in partnership with other CSL programs. |

**Finance and Investment Committees’ Oversight of Listed Tasks**

|  |  |  |
| --- | --- | --- |
| **Action Items** | **Progress July 2022 -> Sep 2024** | **2024 Proposed Tasks**  |
| * Implement approved independent financial report items (i.e., to meet standard financial practices for CSL type of community)
 | Independent financial report items received by finance committee redefined for CSL follow-up. Financial reports finalized Q3, 2023. Financial structure, policies and job descriptions approved by Council 9/23. Financial management framework, approved by Council 3/24, was included as an appendix in CSL’s updated Customary, 6/24. Internal review task group, based on TEC approach, was identified 2nd Qtr for 2024. Redefined group by Abbess needs to complete task by 12/24. | **Lead -** Finance Committee’s Treasurer, supported by Business Manager.**Tasks –** Provide **r**egular financial reports to Council and Chapter. Identify and support internal annual review task group and approved follow-up actions. **Budget** –TBD |
| * 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. 2024 budget adopted by Chapter 1/24, as first year of 5-year budget. Monthly reports provided to Council. The 2025 budget, to be developed 4th Qtr ’24, will provide a 5-year budget with a full year (2024) of actuals to serve as a basis moving forward.  | **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 CSL’s charism.**Budget** – Present updated 5-year budget to Council each Dec. and to Chapter each Jan. |
| * Update investment and stewardship strategies
 | Reorganization of finance area includes charism-driven finance and investment committees. The investment policy and updated approach included in Financial Management framework was approved by Council. Changes related to CSL’s investment account oversight and signatories to be fully implemented in 3rd Qtr ’24. A joint meeting of Finance and Investment committees about coordinated budget approach and needs, to be scheduled for 12/24. Discussions continue related to charism-related goals sought for investment of CSL funds. | **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. |
| **Note 1.** The Finance Committee is to be chaired by CSL’s interim treasurer, Br Jean-Baptiste (effective 10/1/24), and supported by Business-Manager, Sr Mary Magdalene. The successor interim treasurer was appointed by the Abbess and affirmed by the Council, 8/24. [*See* **Note 2**.] Current committee members are Br Gregory and Br David (until 1/1/25). One additional member to be appointed Qtr 4, ‘24.**Note 2.** The Abbess, via the superior’s authority, made this change to the Customary to ensure appointments and practices are consistent with provisions of the Customary. **This change is effective 9/10/24 and will be included in the next written version of the Customary. Clarification of Section VII. CSL Leadership of the Customary is: *“****In consultation with the Council, and with the recommendation of the appropriate Formation Guide and Formation Dean, the Superior may appoint a 2nd Year Novice or 2nd Year Novice Oblate to an Interim Dean-level position for no longer than 12 months.”***Note 3.** The Investment Committee is chaired by Br Robert. Additional members are Sr Άnah 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.**Note 4.** The Finance Committee has asked the Worship Committee to provide input regarding CSL’s core mission (charism) to ensure that CSL’s budget and investment efforts are mission-driven. |

SrJ/9.23.24