

## **Suggested Joint Meeting Agenda for Parish Pastoral Council and Parish Finance Council**

### **Purpose of Meeting:**

At least once per year, the entire Parish Pastoral Council and Parish Finance Council should come together with the pastor to discuss the financial resources of the parish in light of the parish pastoral plan.

The purpose of this meeting is to:

- Examine the financial status of the parish
- Coordinate the Parish Pastoral Plan with the future financial plan of the parish
- Identify financial concerns that may impact the parish in the near future
- Allocate funds towards certain objectives of the Parish Pastoral Plan

### **Participants**

- Pastor
- Pastoral Staff members
- All Parish Pastoral Council members
- All Finance Council members

### **When**

This joint meeting should occur **before** publishing the final Parish Pastoral Plan to the Parish and submitting the plan to the Bishop.

The meeting should also occur **after** the Parish Pastoral Council has affirmed goals and objectives for the Parish Pastoral Plan and the Finance Council has prepared a financial statement for the PPC to review.

### **Anticipated Results of the Meeting**

The result of this joint meeting should be:

- an agreement among the pastor, the PPC and the Parish Finance Council regarding the funding of the initiatives of the Parish Pastoral Plan and all other activities of the parish
- a sharing of the financial status of the parish and priorities for the future.

## **Opening Prayer:**

Lord, God of Holiness,  
You have called us to be the servants of Your servants –  
Our brothers and sisters in the parish.  
We meet here as their representatives,  
And so we ask for the Grace of Your Guidance.  
Help us to truly represent them  
And not simply ourselves.  
May the true needs of our parish  
And the common good of all be our concern.  
And above all, may Your Will in these matters become our Will.

Help us who serve in leadership  
Remember that all of our concerns are aimed at  
The spiritual transformation of our parish community.  
May the material aspects we discuss  
Not blind us to the primary work of our parish:  
The holiness of all its members

May the Holy Spirit,  
Who inspired the Pentecost meeting of the apostles,  
Visit us and grant us the light of Divine Wisdom.  
We ask this through our Lord, Jesus Christ,  
Who lives and reigns with You and the Holy Spirit,  
Forever and ever.

Amen.

*(Prayer from Prayers for the Servants of God by Edward Hays)*

## **Before the Meeting**

In anticipation of the meeting, the Parish Pastoral Council should have prepared copies of the Parish Pastoral Plan including both the Goals and Objectives decided upon by the PPC and ratified by the Pastor. The Pastor and members of the PPC should also have estimated the resources (especially financial resources) that will be needed to accomplish each objective.

The Parish Finance Council should have prepared the most recent annual financial statement of the parish including all revenue, expenses, debts and investments.

The Guidelines for Parish Pastoral Councils recommends that a liaison member from the Parish Finance Council sit on the Parish Pastoral Council. This liaison member should consistently inform both Councils on the progress of the other. In anticipation of this meeting the liaison member should share the emerging objectives with the finance

council and make recommendations back to the Parish Pastoral Council on the feasibility of funding each objective in light of the financial situation of the parish.

**This liaison position is crucial to the success of this joint meeting.** The liaison member and the pastor should inform the Pastoral Council on the financial situation of the parish even as they are creating the initial pastoral plan. The more complete this information sharing the more successful this joint meeting.

During the preparation for a parish assembly or other parish-wide consultation, the liaison member should share the parish finances with the Pastoral Council and decide upon a method for distributing a report to the wider parish on the financial status of the parish. Transparent information sharing is necessary to create a collaborative and effective pastoral and financial plan for the parish.

### **Sharing the Pastoral Plan and Parish Resources**

1. After the prayer, the meeting begins by the Finance Council giving a presentation of the current financial statement of the parish. A copy of the parish financial statement is given to all members of the PPC. The Finance Council chairperson also makes clear any financial concerns that will have an impact on the future life of the parish.
2. Once the financial status of the parish is presented and clarification questions have been made, a member of the PPC provides a brief overview of the parish pastoral plan and distribute copies of the plan to the finance council. The PPC shares with the finance council the estimated cost of any objectives (action steps) within the plan.
3. All members then consider the costs associated with the pastoral objectives. The two councils consider any changes or adjustments to the objectives that may be necessary due to financial restrictions. Once a decision is made on the objectives and the financial resources allotted to each objective the costs should be added to the budget.
4. The ultimate goal of the conversation is to agree upon a fiscally sound budget which takes into consideration the priorities of the parish pastoral plan but also is balanced or, at the very least, seeks to reduce or eliminate debt steadily year to year. If necessary, both councils discuss the need for additional revenue to fund initiatives of the Parish Pastoral Plan.
5. The meeting should conclude with a consensus among the group regarding a financial plan that takes into account the pastoral priorities and initiative of the Parish Pastoral Plan, the activities of the parish as well as salaries, maintenance and all other financial obligations of the parish.

6. The pastor is finally responsible for approving any budget adjustments and the spending associated with the objectives of the Parish Pastoral Plan.
7. If agreement cannot be reached during this meeting, the pastor should schedule a follow-up meeting with the chairperson of the finance council and the pastoral council to reach a decision.

### **Closing Prayer**

Lord of Day and Night  
Of beginning and endings  
As we prepare to conclude this meeting,  
We once again lift up our hearts to You,  
The Divine Source of All Life.

We thank You for the gifts that have been present  
Within this act of service to the community.  
For the gifts of fellowship and understanding,  
Of mutual respect and shared vision,  
We are grateful.  
For the gifts of perseverance  
And insight into the common concerns we share,  
For these and all other graces, we are thankful.

As You have blessed our coming together,  
Now bless our departure and journeys homeward.  
May Your blessing be upon us,  
In the name of the Father, Son and Holy Spirit.

Amen.

*(Prayer from Prayers for the Servants of God by Edward Hays)*

### **After the Meeting**

After the meeting or once the pastoral plan is agreed upon and ratified by the pastor, the pastoral plan should be sent to the Pastoral Planning Office using the Parish Pastoral Plan Reporting Tool. Costs associated with objectives are recorded in the reporting tool and should be reflected in the parish budget submitted to the Diocesan Finance Office.