

An Example of the Use of the Planning Process
in Determining Diocesan Strategy

I Investigación
y Análisis de la → Diocese of Puerto Rico

Survey and Analysis -- Church Policy and Social Change to 1965

Until 1950, the main concern in Spanish work of the Episcopal Church in Puerto Rico was in the rural areas. The Rev. Antonio Ramos has documented this fact with the following quote from Bishop Charles Colmore: "My feeling is that in Puerto Rico we must depend largely upon land for a living and that therefore every mission should have a piece of land at its disposal from which it might draw some income for self-support. I stand ready to do all in my power to help secure funds for the purchase of a reasonable amount of land for any mission in which interest is manifested in this matter." This basic strategy prevailed down through 1950 when Bishop Boynton resigned. The ideas of self-support envisioned, of the type of clergy training necessary, and of the general program of the Church's work were totally unrealistic when viewed on any long-range basis, while they may have been the natural recourse in the hard economic reality of the 1930's and 1940's in Puerto Rico.

Nonetheless, Bishop Colmore's statement made in 1934 was made against the reality of a 50.5% increase in urban population in P.R. from 1920 - 1930. This urban growth slowed to 19.8% in 1935 and to 10.6% in 1940. But in the interim of 1940 to 1950 the increase in urban areas boomed to 58%. From 1950 to 1960 the percentage increase over previous census was down in urban areas to 16.1% reflecting dramatically the large emigration which took place during this period.

Work had begun in the cities of San Juan, Ponce and Mayaguez as a chaplaincy to English-speaking members, in the first two cases, including a significant number of West Indian descendants. In 1904, a second mission, St. Luke's, was begun outside the old city walls in San Juan. In 1924, St. Mary's Church was begun in Ponce as its second mission. St. Luke's Hospital had begun its work in 1905 in Ponce, while St. John's and St. Luke's, San Juan, St. Andrew's, Mayaguez, and Holy Trinity, Ponce sustained primary schools up until the depression years.

A small seminary opened in 1918 in the former Episcopal residence near the University of Puerto Rico, and St. Catherine's

Training School for Women opened in San Juan in 1924, at the site of the present Cathedral. In 1932, and in 1934 respectively, the seminary and school were forced to close for economic reasons. The Industrial School for Boys and the Embroidery School for Girls opened in 1924 in St. Andrew's were able to survive until the war years, when their activity was gradually reduced. They closed in 1953.

It is of interest to note that the original site of St. John's Church opposite the R.C. Cathedral in Old San Juan, purchased in 1902, was sold in 1928 because of "population shift" and the church moved to the "suburbs" of Santurce. Of even greater interest is the fact that in 1940, St. Luke's Church, just outside Old San Juan, was sold and the congregations united with those of the Cathedral of St. John. 1938 saw the establishment of a new Spanish congregation in suburban San Juan (Roosevelt), Incarnation.

Work had begun on the nearby island of Vieques in 1880 amongst the West Indians and continued on under Episcopal Church direction after the turn of the century, gradually adapting to Spanish over the years.

Rural work was initiated at El Coto, near Manati on the north coast, in 1915, consisting of a chapel, clinic and primary school. In 1923, through the consecration of the Rev. Manuel Ferrando, a large group of members and four clergy were added to the rural work near Ponce. Two rural missions were developed not far from San Juan in the late 20's: St. Hilda's in 1926 at Las Cuevas, Trujillo Alto, and St. Joseph's in 1929 at Caimito, Rio Piedras. 1930 saw the development of a new mountain mission nearby the diocesan rest house at Las Rubias. In the next ten years this work grew to 12 missions and stations requiring 3 resident clergy each living in the center of 4 points. In 1944, Bishop Colmore opened an agricultural high school for boys, the first of its kind in the country in the heart of the Ponce rural area, Quebrada Limon.

The work of the Sisters of the Transfiguration in Ponce at St. Luke's Hospital and surrounding parishes began in 1944 as well. In 1945, the seminary reopened at the Cathedral, and in 1946, a day school reopened there.

The agricultural high school was moved to St. Just near San Juan in 1948, providing opportunity for a new mission, Holy

Family. In 1945, the first new urban work in twenty years was opened in the town of Yauco, at the heart of the mountain and Ponce rural areas.

In 1948, of eighteen active clergy 3 were American continentals, 4 were former R.C. priests (2 from Spain, one from Holland, 1 from Bolivia), 2 were former P.R. Presbyterians, 7 were originally ordained Puerto Rican Episcopalians.

The arrival of Bishop Swift in 1951 signalled the end of an era and the beginning of a new and very different chapter in the life of the Church in Puerto Rico. One of the first steps taken was to seek out and encourage with financial support, candidates for the ministry, providing young men with full university and seminary training.

The Church's large farm properties were sold as opportunities presented themselves, and the money used to finance construction of Colegio San Justo at St. Just in 1957. That same year saw the completion of the Cathedral Academy building allowing the last two years of high school to be offered.

A new concern for urban work was evident in the purchase of land and house for St. Michael's Center for delinquent boys in Ponce in 1952, and in the opening of a new suburban mission in Lomas Verdes, Bayamon in 1958.

In 1961 of 23 active clergy in addition to the bishop, 9 continentals, six Spaniards, and 8 Puerto Ricans were at work in the diocese.

In 1960, 37.3% of the island's 2,349,544 residents lived in the urban metropolitan areas (SMSA) of San Juan, Ponce and Mayaguez, and almost 50% of the population total lived in urban areas while in 1940 the percentage was 30%. Emigration in 1940 was 1,008, in 1950 increased vastly to 34,155, by 1960 had dropped to 23,742, and in 1962 was 11,363. Most recent figures show a balance of emigration and immigration.

In the period 1961-3, five new urban missions were begun in Arecibo, Fajardo, Caguas, and in San Juan, College Park (St. Stephen's) and El Comandante (St. Francis'). The former three were established in regional towns of more than 25,000 people with a high potential for growth because of their focus on the San Juan Metropolitan area. The latter two were located in the suburbs of the metropolitan area.

All five, plus the previously established suburban metropolitan mission in Lomas Verdes, Bayamon, were staffed by continental clergy, and in four of the six, both English and Spanish services have been held regularly. All but one of the clergy has been trained in Spanish, and understands the Church's mission as being to Spanish-speaking persons predominantly. St. Stephen's was founded as an English language mission and has rapidly assumed a very heavy degree of financial responsibility in its upper-middle class area. A majority of its members were formerly associated with the Cathedral English congregation, just as a significant nucleus of former Spanish congregation members of the Cathedral has aided in the establishment of the congregations in all the other missions with the possible exception of Arecibo, which drew some nucleus from former members of the Mayaguez and mountain area churches.

Diagnosis

None of the missions have shown spectacular growth in terms of new members baptized or confirmed, nor consequently in total local support, (with the exception of St. Stephen's) while the level of stewardship is better in some than in most of the diocese.

In the period 1960-1964, the three oldest and largest urban (and increasingly inner city) churches showed a drop in communicant membership: Cathedral in total from 482 to 453 (Spanish more seriously from 1962 high of 294 to 1964 figure 216; Holy Trinity from 584 to 458; and St. Andrew's from 408 to 298. All the Spanish congregations have shown a corresponding drop in income during the same period. If one removes the figures of the six new urban missions, the diocese as a whole has shown in this period a net decrease of 3,646 communicants to 3,486, a difference of 160. Even including the new missions, the net increase in four years is 116 communicants, much of which would be natural institutional growth of family members. More accurate reporting of statistics has been a slight correcting factor, but the general impression of lack of missionary vigor is unavoidable. Excluding the new missions, stewardship has increased in total local contributions from \$75,883 to \$110,348, an increase of 45.4%. However, personal income per capita in Puerto Rico grew in the same period from \$598 in 1959-60 to \$900 in 1964-65, an increase of 50%.

Looking ahead after the establishment of the new missions in 1961, Bishop Swift stated: "As soon as funds are available,

the district is prepared to embark on further expansion with seven more new urban pieces of work (Adjuntas, San German, Manati, Humacao, Mayaguez, San Juan, Puerto Nuevo and Ponce listed possibilities), plus a Center at the University of Puerto Rico, and a High School in Ponce." He further explained the university project: "We must build an adequate student center, chapel, social hall and apartment for the chaplain; indeed this particular project personifies the need for the Episcopal Church in Puerto Rico and can be one of our most productive pieces of missionary endeavor, producing more intelligent, middle-class Episcopalians, who in turn will help us to expand and to become more self-supporting all over the island."

From 1951 to 1961 the diocese received as Capital Grants from Overseas Dept. or the United Thank Offering a total of \$931,608, of which slightly less than half was spent on Urban Parishes. The remainder was spent largely on diocesan institutions. Executive Council Operating Budget subsidies to the diocese have increased sharply from \$ 99,025 in 1951 to \$147,939 in 1961. The 1965 subsidy was even greater to \$287,302, an increase of 94% over 1961. Local contributions had risen slowly to \$19,126 in 1951 and to \$118,367 in 1961, a very sharp increase of 522%. From 1961 to 1964 the increase was greatly modified at 13.3%, the total being \$134,049. Two factors contributed to this picture: first, the tremendous change in the Puerto Rican economic situation from 1950 to 1960, and secondly, Bishop Swift's persistent insistence on the principle of self-support throughout his time in Puerto Rico. The recent leveling off is indicative of the fact that the economic boom continues although the changes are not so dramatic, and that some deeper understanding of Christian stewardship is needed beyond the somewhat limited concept of self-support.

In 1964 the diocese received a UTO grant of \$100,000 towards the establishing of the University Center, and in July, 1965 a full-time chaplain to the University of Puerto Rico was assigned. In October of the same year half of the UTO grant was invested in property near the University, ironically directly across the street from the property which was formerly used for the Episcopal residence and later the seminary. It had been sold in the depression years. It is of interest to note that this university work has been founded with a clear ecumenical basis, which has to date proved very fruitful for all involved.

The greatest significant fact is that in 1965 the clergy were composed of: the first native diocesan bishop, 18 native clergy (11 younger than 28 years of age and fully trained at both university

and seminary), 4 Spaniards (all over 40 years and non-Episcopally trained), 1 Cuban, 1 Peruvian, both Episcopally trained, and 12 continentals (all younger than 45 and Episcopally trained), a total of 37 clergy. This rapid increase in native clergy, fully trained, is largely responsible for the great increase in Overseas Dept. subsidy, as the men had been placed in curacies upon graduation, thus adding staff to situations which were already failing in their stewardship growth in relation to demand. There seems both to have been little opportunity, and little concern on the part of this new generation, generally speaking, to teach and insist on the basic principles of stewardship.

Prognosis

In the light of the foregoing survey, it seems clear that the Episcopal Church in Puerto Rico has shifted its attention and resources to urban work, in the last five years especially. The wisdom of that decision-making process may be questioned only for its lateness, and the lack of general policy and program preparedness to deal with the new situations so rapidly developing. There is not the slightest doubt that now not only the Church's financial stability, but increasingly its ministry in the social context, must be founded on a comprehensive approach to the urban society. What was in the past to a large extent an English-speaking chaplaincy with developing middle-class Spanish work, is now increasingly a predominantly Spanish work ranging through all social and economic strata. The projected middle-class influx in church membership as a result of the social, economic and political changes in the late 50's, and particularly in 1960, upon which six new urban missions were opened at considerable expense, has not materialized.

At the same time, the key "inner city" parishes which have always been the sources of the Church's financial strength, and its major sources of lay leadership and vocations to the ordained ministry, are in a state of missionary and financial decline. Rural missions can no longer depend on an agricultural base to provide their support, and an increasing mobility on the part of their members debilitates much of the work, especially with young people. The former fringe rural areas outside of San Juan and Ponce are rapidly becoming integrated into the metropolitan complexes. In some cases, the churches have already been surrounded by booming urbanizations, and find themselves physically, financially, and in terms of staff and program, unprepared to deal with a new and changing community. The laity of the churches, having never been

trained in mission or ministry, are increasingly torn and confused by the dynamic and powerful forces of economic and social change affecting the culture, which have for the most part been ignored by the churches in their program, teaching and ministry. The declining degree of commitment on the part of those who are already members is evident in the decreasing communicant strength and slumping stewardship record (particularly on the part of Puerto Ricans) despite greatly increased income levels. Increasing Overseas Dept. subsidies for operating costs and the staggering capital funds needed only for repair of present deteriorated structures, and addition of physical plant to presently established missions, forebode a diminishing both of autonomy and of the possibility of immediate implementation.

An examination of recent Capital Grants Requests illustrates the situation:

⑦ 1966 — Bishop Salo (See attached tabulation)

The 1965 priority list was devised by the Bishop and diocesan treasurer, and briefly submitted to the Diocesan Executive Council, which made only one change in priority and two small augments in requests. The Overseas Dept. under its new, but as yet limited policy of requesting regional consultation and approval before granting funds, eliminated all but the top two priorities from the P.R. list when an inclusive list of Ninth Province requests was circulated late in 1965 for final approval and recommendation. Other dioceses had as many as five or six requests on the inclusive list for consideration. There is no guarantee that Puerto Rico will receive approval for either of its requests. In the light of the fact that there has been no existing diocesan mechanism for coordinating planning, it is not surprising that no clear definition of policy or program accompanied any of the grant requests, or that the implications of recent developments in the Urban Program in Puerto Rico were not included in the overall concept. Nonetheless, there is still an overbearing urban emphasis evident in the requests since 1961. It is the comprehensive plan which has been lacking, the absence of which is clearly indicated by the changing order and nature of the priorities in the brief space of four years.

Continually rising diocesan program expenses (raised locally) depending on the quota system indicate the same critical stress and strain of a rapidly changing situation. Since 1961, the budget has more than tripled from \$6,300 to \$21,340 in 1965. Projections for 1967 are for another 25% increase to \$28,907 as the diocese seeks to assume an ever greater load in terms of Convocation, Administration, Diocesan Clergy and Lay Benefits, Diocesan Executive Council

<u>1961 (after UTO \$250,000 grant)</u>		<u>1963</u>		<u>1965</u>	
1. University Center	\$250,000	Same		St. Stephen's Ch.	\$ 50,000
2. 6 New Missions	500,000	St. Andrew's	\$60,000	Same	
3. High School, Ponce	140,000	Retreat Center	15,000	St. Francis	78,000
4. St. Andrew's	60,000	St. Francis	100,000	St. Hilda	85,000
5. St. Andrew's Kitchen	15,000	Mayaguez Mission	30,000	Mountain Rectory and Parish House (Transfiguration)	28,000
6. Retreat Center	7,500	Ponce High School	150,000	Fringe Area Parish House (St. Mark's)	25,000
7. St. Luke's Hospital	80,000	St. Hilda's	20,000	University Center	150,000
8. Mountain Parish House (Transfiguration)	12,000	St. Mark's Parish House	25,000	Retreat Center	50,000
9. -		Mountain Parish House (Transfiguration)	15,000	5 New Missions	500,000
10. -		4 New Missions	400,000	Ponce High School	150,000

Programs, National Church quota, MRI, 9th Province quota, General Convention Delegates' expenses, Episcopal Chair Trust. For the first time in 1966, the diocesan convocation will approve a future budget instead of the present year's budget, which should aid the parishes in their long-range planning, as well as the diocese. It should be stated that the greatly increased, locally-raised Diocesan Program Budgets represent the democratization and decentralized responsibilities introduced by the 1965 Diocesan Restructuring Report, and the goal of greater local responsibility and stewardship in the implementation of diocesan program.

Population trends in Puerto Rico indicate that by 1970 population will total 2,896,000 and by 1980 3,263,000. In terms of local or regional prognosis, statistics indicate that there is a net decrease in population quite evident in the western rural areas and even from the Mayaguez metropolitan area (3 rural missions are located in the former); a distinct population movement towards a cross island axis between San Juan and Ponce in the towns and municipalities located therein; a significant influx to the Ponce area, and a tremendous tide into the San Juan area. In 1960, of the almost 44% of the total population living in urban areas, San Juan had 28%. Its urban area doubled in size in the decade 1950-60.

Current forecasts for these three metropolitan areas are:

	<u>1960</u>	<u>1964</u>	<u>1965</u>	<u>1970</u>	<u>1980</u>
San Juan	647,979	737,500	-	-	1,100,000*
Ponce	145,586	-	167,219*	182,356*	231,033*
Mayaguez	83,850	-	-	86,000*	-

*estimated

~~Executive Summary of the Bishop's Report on the Diocesan Capital Grants Program~~

A second alternative which has in past policy ~~been~~ from time to time played a dominant role in the development of the Church's work, usually for brief periods, is that of concentrating diocesan strategy on institutional establishment. Because of the high capital, operating and personnel costs of most institutional organizations, not to speak of the greatly increased administrative responsibility generated, ~~and~~ generally projected to the highest executive level, that is, the bishop, already existent ~~and~~ diocesan institutional programs have consistently drained off over the years ~~the~~ or more of the capital grants requests and operating subsidies, and an almost disproportionate amount of the diocesan's time and concern. Here the goals have of necessity been more clearly established in most cases, and both a comprehensive and a specific plan of action have been designed and put in action ~~and~~ greater ~~effect~~. In some cases however, policy has not been adequately evaluated and reviewed over the years, and there has been some confusion about the long-range plans for the institutions. A case in point here is the recent confusion and concern over diocesan educational institutions.

Nonetheless, the current Capital Funds Request includes three situations which have been construed by many as institutional programs of highest priority: the University Center \$250,000 (\$100,000 already granted); Repair and Expansion of Diocesan Conference Center (Retreat House) \$50,000; and the Ponce High School \$150,000. The 1961 request for \$80,000 for St. Luke's Hospital was dropped in 1963 ~~and~~ when ~~the~~ the money was raised locally and through Federal assistance. The ~~Overseas Dept.~~ subsidy included \$18,000 St. Luke's School of Nursing, and ~~roughly~~ \$30,000 for Colegio San Justo, the Boy's School ~~and~~ ~~roughly~~ each of the last six years. In 1963 this represented roughly 17% of subsidy received, while the Capital Grants Requests represented roughly 30% of total. While ~~the~~ requests are currently ~~of~~ ~~higher~~ ~~priority~~, ~~and~~ ~~the~~ recent discussion has seriously considered the possibility and desirability of using already existing funds to permanently institutionalize both the University and Conference Centers. ~~It~~ has apparently been overlooked to date, especially in the case of the latter, that to invest ~~now~~ in either would be a radical departure from the priorities already established. The glaring lack of a ~~disciplined~~ planning process is nowhere more evident, and the realization that there is no overarching comprehensive plan clearly illustrated.

A third alternative ~~is~~ for policy, already implicit ~~in~~ as well in both Capital Grants Requests, and in recent ~~executive~~ executive decisions in regard to personnel placement and financial support and/or tolerance, is that of strengthening and redeveloping the work of the Church in its present involvement. 1965 Capital Grants Requests show that highest priority in all areas is given to this policy. ~~New~~ Missions already struggling for self-support, ~~and~~ seeking to expand in Spanish work in areas of upper and middle income received first and third priority. ~~Inner~~ City Parish in a deteriorated physical and financial but vigorous missionary state received second priority. Two ~~"bridge"~~ ~~urban~~ ~~missions~~ formerly rural, increasingly urban, received fourth and sixth priority. A vigorous and renewed Mountain mission received fifth priority for badly needed repairs and new construction. In almost all these situations, active young clergy have been ~~and~~ or will be assigned either as priest in charge or if available as assistant. ~~Together~~ ~~with~~ ~~the~~ ~~placement~~ ~~of~~ ~~two~~ ~~man~~ ~~teams~~ ~~in~~ ~~two~~ ~~inner~~ ~~city~~ ~~situations~~ ~~(~~ ~~Cathedral~~ ~~and~~ ~~the~~ ~~Palardo~~ ~~and~~ ~~Caguas~~ ~~recently~~ ~~),~~ ~~although~~ ~~none~~ ~~is~~ ~~on~~ ~~the~~ ~~Capital~~ ~~Grants~~ ~~list~~ ~~,,~~ ~~the~~ ~~over~~ ~~all~~ ~~policy~~ ~~being~~ ~~implemented~~ ~~and~~ ~~the~~ ~~operating~~ ~~situations~~ ~~demanding~~ ~~as~~ ~~one~~ ~~of~~ ~~consolidation~~ ~~and~~ ~~strengthening~~ ~~of~~ ~~existing~~ ~~missions~~ ~~and~~ ~~the~~ ~~attached~~ ~~graph~~ ~~on~~ ~~Episcopal~~ ~~Church~~ ~~Finance~~ ~~and~~ ~~Clergy~~ ~~Increase~~ ~~demonstrates~~ ~~that~~ ~~the~~ ~~operating~~ ~~costs~~ ~~for~~ ~~all~~ ~~of~~ ~~the~~ ~~young~~ ~~clergy~~ ~~are~~ ~~being~~ ~~paid~~ ~~out~~ ~~of~~ ~~Capital~~ ~~Funds~~ ~~and~~ ~~that~~ ~~that~~ ~~subsidy~~ ~~has~~ ~~been~~ ~~used~~ ~~in~~ ~~the~~ ~~last~~ ~~5~~ ~~years~~ ~~almost~~ ~~exclusively~~.

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THE NATIONAL COUNCIL

...the attached graph on Episcopal Church Finance and Clergy Increase demonstrates that the operating costs for all of the young clergy are being paid out of Capital Funds and that that subsidy has been used in the last 5 years almost exclusively.

in the support of already existing missions or parishes.

The goal of this ~~first~~ third alternative is to deepen, and ~~renew~~ ^{renew} the mission of the Church in ~~various~~ ^{various} situations in which it now finds itself at work. ~~The~~ ^{The} ~~process~~ ^{process} has been operative for ~~some~~ ^{some} only a short period of time, and has ~~not~~ ^{not} been defined by reaction to circumstances rather than by more deliberate planning process. Still ~~the~~ ^{the} outlines of ~~the~~ ^a policy have become increasingly more evident in recent months, and in fact have been broadly outlined ~~by~~ ^{by} ~~the~~ ^{the} ~~Commission~~ ^{Commission} and placed in the proper frame of ~~reference~~ ^{reference} by Bishop Reus in his Enthronement Address: Conditions for Disciplined Renewal and Planning

1. We must examine the world in which we live and see it as it is, not as we would like it to be.
2. We must examine our Church, reevaluate it in terms of its strengths, weaknesses and potential.
3. We must structure it in such a way that this new Church can serve in this new world.

Goals

1. Renovation of the institutional Church; renew its mission to the world. Study and evaluate our organizational structures. Do our organizations and activities conform with the purpose of the Church as the Body of Christ?
2. Translate our rural strategy to an urban strategy, at the same time re-orienting our rural work.
3. Introduce new forms of ministry to satisfy special situations: chaplaincies in prisons, to seamen, businessmen, universities, hospitals.
4. Strengthen ~~our~~ established work and establish new work where it seems reasonable.
5. Stimulate vocations to holy orders both among young men and older men.
6. Increase our stewardship; depend less on the PECUSA.
7. Develop a lay ministry by conferences, retreats, training.
8. Post-ordination training of clergy, conferences, retreats, study programs.
9. Ecumenical relations: accentuate that which unites us with other churches and work together on common problems in our society.
10. Involve ourselves in the mission of ~~the~~ MRI.
11. Work cooperatively in the program of the 9th Province.
12. Intensify our Summer Programs, and Youth Conferences.
13. Develop a diocesan Conference Center.
14. Involve ourselves in community social action movements.

Bishop's Reus' conditions and goals are a clear demand for the definition of comprehensive policy which will take into account the ~~past~~ intent and momentum of the previously discussed and ~~partially~~ partially implemented policies, but which is neither ~~undisciplined~~ a mere modus operandi nor an undisciplined, ~~uncertain~~ uncertain, hurried and irresponsible temporizing with what are ongoing questions and problems for the life of the Church. It is a clear call for a concerted and total effort on the part of each and every ~~member~~ member of the diocese to accept their responsibility in consciously and rationally planning for present and future mission. It is a request for response on the part of the Diocesan Executive Council to the goals outlined, to weigh the alternatives implied in the statement of goals, to ~~formulate~~ ^{formulate} an overarching policy, ~~design~~ design a comprehensive plan of action, and finally to implement the component parts of the program, reviewing and evaluating the whole ~~throughout~~ throughout the process.

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It is ~~obvious~~ obvious from the financial statistics and organizational difficulties described earlier that any attempt to design a comprehensive plan for action on the basis of the first alternative policy of ~~mass~~ mass physical expansion would be both unrealistic and seriously debilitating to the life, ~~and~~ vision and mission of the Church in Puerto Rico. It seems equally obvious ~~that~~ for ~~the~~ ~~same~~ the same reasons, that the second alternative of adopting an institutional expression of basically the same policy would be equally irrational and paralyzing. And while the third alternative perhaps comes closest to being a rational policy, its inadequacy lies ~~in~~ both in its competitive stance in comparison with the other two, (its exclusiveness), and in ~~addition~~ the fact that like the ~~other~~ first two, it is not really the response to a premeditated, comprehensive plan ~~or~~ ~~the~~ diocesan strategy for mission.

The Bishop has pointed the way to ~~the~~ ^{the} fourth alternative, and by requesting Pilot Diocese status, he has in effect forced the issue, both in terms of the response from the Overseas and Home Depts. for assistance and consultation in developing a long-range strategy, and in terms of the responsibility placed on the diocese in formulating the essential features of that strategy, and submitting them to professional review and evaluation techniques and processes. ~~Puerto Rico must, as a diocese, learn to plan.~~

~~Policy~~ A COMPREHENSIVE PLAN

criteria and techniques for the evaluation and review of programs in regard to their effectiveness, financing, and viability or value for effecting significant change in the Church both at local and ~~parish~~ diocesan levels.

Selection of Policy

~~Below~~ In addition to Bishop Reus' outline of some basic conditions and goals which must be included in a comprehensive diocesan policy, the ~~the~~ diocesan Urban Program Advisory Committee, after considerable discussion and revision, ~~which~~ finally ~~was~~ in consultation with the Bishop, also has suggested some Goals in a Long Range Strategy for Urban Program. These goals are an expression of the insights and experiences gained in the various facets of ~~the~~ Urban Program development in Puerto Rico to date. (See document Urban Program Development in Puerto Rico) p. 15). An attempt is here made to combine the basic concerns and principles expressed in both of these statements in seeking to define a comprehensive policy for consideration as a basis for program design alternatives.

- A comprehensive policy for long-range planning demands that we "examine the world in which we live and see it as it is." This requires the ~~delegation~~ delegation of the responsibility of information and data-gathering, investigation and evaluation to some specific ~~personnel~~ group and/or persons in the diocese. This organism would maintain continuous contact with government, Church and private agencies in related fields.
- A comprehensive policy demands that we "examine the Church, reevaluate it in terms of its strengths, weaknesses, ~~and~~ potential, and organization." The same organism, using many of the same techniques would carry out this data-gathering or research function, and would develop realistic and practical
- A comprehensive policy demands that we "structure the Church in such a way that it can serve in the new world". A first step here is to awaken the Church to a consciousness of her responsibility as an important ~~and~~ creative agent of change in the community, by: seeking opportunities to cooperate with government and private agencies in action; promoting the conscious involvement of the Church as the Church in the decision-making groups in the community; ~~and~~ producing changes in the local community by means of community organization and action. Again, some body should be specifically charged with stimulating and helping the local and diocesan representatives decide how they wish to develop and execute new ways of ministering both by means of already existing structures, as well as apart from them.
- A comprehensive policy demands "a renovation of the institutional Church, a renewal of its mission to the world," strengthening established work and establishing new work where it seems reasonable, including new forms of ministry ~~which~~ to satisfy special situations, and a reorientation of both urban and rural work, always in the light of the data available and upon the joint decision of local and diocesan authority.
- A comprehensive ~~policy~~ policy demands ecumenical cooperation, "working together on common problems in our society", seeking ways of developing an ecumenical ministry in the community, particularly at the local level. In the broader sense this implies "involving ourselves in community social action." "Inasmuch as you have done it unto one of the least of these my brethren, you have done it unto me."
- A comprehensive policy demands a greatly increased promotion of stewardship, and a ~~greater and more serious~~ greater and more serious acceptance of increased autonomy and financial responsibility.
- A comprehensive policy demands that we develop a center for the continual training of clergy and laity in the specific methodology of mission in contemporary culture, by means of study programs, conferences, training programs, Summer Programs and Youth Conferences.
- A comprehensive policy demands that we "stimulate vocations to holy orders both among young and older men" including studies of the possibility of ordaining to the priesthood persons who continue in their secular jobs.
- A comprehensive policy demands that we "work cooperatively in the program of the Ninth Province, and involve ourselves in the mission of MRI."

A comprehensive policy demands that we continually communicate to the clergy and laity of the diocese the insights and changes which are produced in a rapidly changing society, and specifically to inform them of the plans, ~~programs~~ of present and proposed activities, and of the results of already functioning programs.

Program Alternatives

Were such a comprehensive policy statement to be adopted and approved by the Bishop and the Diocesan Executive Council, and presented to Convocation for their ~~expressed~~ comment, ~~and~~ amendment and approval, the following alternatives suggest themselves in the light of ~~such~~ a comprehensive policy:

The research or data and information gathering agency which would deal with both the social and the ecclesiological studies could be ~~immediately~~ a non-Episcopal body or consultant, such as the Commission for Research and Church Planning or its Director, Roberto Morales. Or it could be a strictly Episcopal body with one full time staff man to coordinate the ~~work~~ part-time work and study of others. Or it could be a combination of a full-time Episcopal diocesan staff man, working in close consultation with the Commission, and Roberto Morales specifically, on a professional contract basis, as well as with others in government etc. In this particular case, the third alternative would seem both to be the most feasible ~~alternative~~ given the present structure and responsibility of both the Commission and Roberto Morales, his very specific and professional training in this type of work, and the inexperience of any Episcopalian in the area of research. As will be indicated, it seems impractical at present to expect that any Episcopalian could be made available full time just to do research of this type.

The awakening of the Church to a consciousness of her responsibility and opportunity as a creative agent for change implies the task of interpreting the data gathered, and suggesting possibilities arising from the data on a consultative basis, in close communication with local and diocesan representatives who would always be the ones to make any decision to act on any particular plan or recommendation. The planning and programming functions are implied here, and there are several alternatives which may be considered in the present situation. *It is possible that a Consultant Team could be ~~constituted~~ constituted to deal with this policy emphasis, and that dealing with the renewal of the Church's mission to the world. One recommendation would be to form a Joint Consultant Team consisting of the research staff man, the Chairman of the Dept. of Special Ministries, the Chairman of the Dept. of Evangelism, ~~and~~ ~~and~~ and the Chairman of the Dept. of Strategy and Expansion, or some suitable member delegate of those departments. On invitation they would visit the various parishes and missions of the diocese to discuss with them their local plans for mission action, and program, in the light of the data pertinent to the local situation. Another alternative would be the inclusion of Roberto Morales in this Team as an official member. Because of his technical skills, at least for a year, his professional assistance in this way would be invaluable, and would add from the outset, the ecumenical dimension called for in the comprehensive policy. A third possibility would be to use the staff man alone in this capacity, but this would probably place an unfair communication and administrative load on him, not to speak of the dangers of his being identified as the decision maker trying to "sell" his ideas to others, when in fact what is desired here is precisely the opposite, the stimulation of local concern and involvement. The Joint Team would be responsible to the Bishop and diocesan Executive Council, *and would be co-ordinators.**

In regard to ecumenical cooperation there are several alternatives. One is of ~~course~~ to continue under the present haphazard ~~and~~ quite irregular efforts *at a common* approach to problems affecting ~~the~~ the community. To do so ~~would~~ however

would be in effect to deny that we share a common approach to community problems, something which the conference El Urbanismo y La Iglesia loudly and enthusiastically proclaimed and in effect, demanded. A second alternative, would be to await the initiative of either the Roman Catholic or Evangelical groups in inviting us to ~~them~~ join in some kind of group for action. This alternative seems unacceptable also in that we are in the ~~only~~ unique middle position, despite our relatively insignificant membership when compared with either of the other groups, if for no other reason than the fact that we ourselves have become concerned with this ecumenical approach, and have already demonstrated that concern at ~~the~~ Metabagdad San Juan. It would seem logical then that we take the initiative and invite both the Evangelical and Roman Catholic groups to join us in constituting a permanent, ~~with~~ regularly ~~meeting~~ meeting Social Action Council which could serve both as an advisory body to all of the denominations in terms of social change, ^{organization, and} possible joint action programs, and could also, when so desired and possible, speak with a common voice for all of the denominations. This just might be the first functional step towards a true Council of Churches body. However it must be emphasized that this is an ecumenical social action body, and not a theological commission to discuss ecumenical cooperation, which has been one totally different alternative proposed in the past.

The question of stewardship needs to be considered very seriously indeed, from the diocesan level on down, and some appropriate ~~diocesan~~ diocesan task force should be designated, working in close conjunction with the Dept. of Stewardship and Finance, and the Joint Team, to stimulate a renewed sense of mission and responsibility for mission in terms of time, talents and money in every mission and parish. There should be a visitation of every parish by this team, ~~regularly~~ on some occasion other than in the heat of the Every Member Canvass. A second and supplementary alternative is to produce more written and visual material, ~~and~~ but the Ninth Province ~~community~~ will shortly undertake this task, and in the end, personal involvement on the part of laity and clergy is far more important. The third alternative is to do nothing, and let the increasing weight of quotas, local support, and U.S. subsidies ~~slowly~~ slowly snuff out all initiative and responsibility at the local level. This has been our history to date; it is time we began to do something serious and concerted to change it. But it must be a comprehensive and long-range plan, ~~with~~ with the ultimate goal of maximum local involvement.

The development of a center for continual study and training and laity is of prime importance to the comprehensive process of a renewal policy. There are presently two alternatives facing the diocese. One is the proposal to develop Quinta Tranquila as a diocesan Conference Center to be used for lay training, on weekends largely. The second is to provide post-ordination "refresher" courses for clergy at El Seminario del Caribe during the summer months. Neither of these proposals can be considered comprehensive in themselves, and it is doubtful if either one as presently designed, will have much success in the diocese. What is needed is an ongoing year-round concern for training and education of both clergy and laity, for the most part of the time, in their own areas. Regional training programs of specific and practical content and duration would be offered at some convenient central location. These could vary depending on the group for whom one intended the material. The facilities of Holy Trinity, St. Mary's or St. Luke's, Ponce; the Cathedral, the University, the Evangelical Seminary or the Episcopal Seminary in San Juan; and of the University, ~~the~~ or St. Andrew's in Mayaguez are more than adequate for regularly programmed courses ~~sponsored~~ sponsored jointly by the local parishes, ~~within~~ the diocese and the educational institutions interested in cooperating. Ideally, and especially if smaller local programs of shorter duration were to be offered to non-metropolitan area clergy and congregations, there should be a full time priest in charge of ~~the~~ the coordination and development of this work, using wherever possible the skills of professors, clergy and laity in the teaching and training offered. It is possible that this person might be attached part-time officially to the Episcopal Seminary, and/or the diocese with some mission assignment on a part-time basis.

There would certainly seem to be slight justification given the tremendous

tide of population towards the San Juan-Ponce axis, and the San Juan area itself, for investing further capital in a facility which is located in the most inaccessible part of the island, especially when the Seminary is currently evaluating the possibilities of expanding its ~~contacts and services~~ contacts and services with ~~the~~ and in its local setting eg. Cultural Studies program beginning 1967 at UPR, and is located on a piece of property which is far larger than even ~~the~~ the greatest predictions for future development can project utilizing. If a diocesan Conference Center is to be erected, a serious investigation of the possibilities of arriving at some agreement with the Seminary ought to be fully exploited.

The operation of such a center should include as another alternative the regular and programmed participation of interested ~~and~~ clergy and laity in a variety of professional training programs available both locally and in the U.S.A., often on full or substantial scholarship. Very special attention should be directed to young highschool and university people in this regard, in seeking out ongoing opportunities for meaningful experiences in the life and work of the Church, with a very open but non-coercive policy of encouraging vocations to the professional ministry, either lay, or ordained. If and when the need or opportunity arises, special attention and consideration should be given to the possibility of training and ordaining men to the non-stipendary priesthood.

Through the coordinated efforts of the Depts. of Extra Diocesan Affairs, and Public Relations, together with the diocesan organ CREDO, every ~~attempt~~ attempt would be made to communicate the results of this comprehensive policy implementation to the Ninth Province, and to the rest of the Church in the spirit of MRI. The staff Coordinator of the research and ~~the~~ Joint Team consultants would be responsible for the communication of the information forthcoming from those sectors of activity, as would the Training Coordinator for those related to the Center.

Initial Program Implementation

The following situations seem to be the obvious ones to be developed into pilot projects in the initial experimental phase of a comprehensive program. Some have been chosen because of past involvement in Summer Programs, and other community activities, and of their potential involvement in the Community Action (Poverty) Program: St. Andrew's, Mayaguez; Christ the King, Caguas; Transfiguration, Las Rubias; St. Mark's, Naguayes; Good Shepherd, Fajardo. Transfiguration and Good Shepherd are not at present in the Poverty Proposal, but are involved in ministries which could easily be combined with existing government programs. Others have been chosen because of their critical importance to the life of the whole diocese, and the amount of consideration and planning which has already gone on in regard to a proper development of their ministry along lines which are of integral importance to the whole diocesan program. In other words, if they are not included, the whole program will not only suffer, but will be severely compromised by a fragmentary, rather than a diocesan approach to renewal of the Church. Any plan for renewal which would leave out the critical situations now existent at both the University of Puerto Rico, and the Cathedral would be both unrealistic, and ultimately unimportant.

These seven situations are compatible choices in any pilot process for each is entirely different both in the history and nature of its ministry, in its present and future financial condition, and in the kinds of ministry likely to be developed. It seems likely that this combination of projects would provide a variety of models and techniques for renewing present church structures, and programs, ~~and~~ and for new ministries both in this diocese and possibly in others.

The undertaking of an expanded diocesan program will certainly require a full-time Coordinator. Until such a person is available, it would seem unwise to attempt to implement the program. An almost equally necessary resource for the proper development of such an expanded program would be a Consultant in Planning and Research, who would be capable of doing the sociological research and evaluation so necessary to any disciplined experimental program. The only other factors affecting timing would be the readiness of the national Executive Council to find the funds, and the availability of additional manpower which will be necessary to adequately field the program.

Suggested Personnel and Budgets for Possible Pilot Projects

St. Andrew's, Mayaguez: Has currently requested \$60,000 for repair of facilities; parish house, clergy quarters, classrooms. The Church owns a choice downtown lot on edge of urban renewal area. Some preliminary investigation has been done in regard to the possibility of obtaining FHA funds for at least part of needed construction. Until facilities are improved, there is little feasibility of expanding staff or budget for costs will be greatly increased by rentals. Present staff of rector and assistant needs to be expanded by at least one more clergymen. This would free rector for better supervision, and would enable the College Work and community work to expand, if other personnel and budget were available. Under other personnel, the parish ought definitely to have a full-time social worker, or community developer, such as requested in Poverty Proposal. Such a person would work closely with the rector if Church sponsored, less closely if government sponsored. Full-time competent secretary-bookkeeper needed for parish office.

Ideally a full time Chaplain to the University of Puerto Rico at Mayaguez ought to be assigned. He would serve as an ecumenical chaplain to all Protestant students on campus, and would form part of a metropolitan team ministry.

Estimated budget annually: \$15,000-20,000

Cathedral - Present financial condition of parish is extremely strained under heavy diocesan quota and local support load. Spanish congregation is not able to support itself. Needs one full-time English work priest with full-time secretary-bookkeeper. Both could be paid for by English congregation, ~~both could be paid for by English congregation.~~ Could use additional part-time services of another English and Spanish speaking priest.

Needs full-time parish priest for Spanish work plus full-time Spanish secretary, and full-time assistant Spanish work priest, aside from school chaplain. School chaplain could be English speaking. Need funds to develop downtown church program and ministry *and focus metropolitan ministry.* Budget for increased personnel and program \$ 16,000

Christ the King, Caguas. - This mission is working in somewhat overtaxed facilities at present, but with adequate staff could make much greater use of community facilities than ~~presently~~ *at present*. The basic requirement is at least one full-time priest, one full time social worker or community organizer, one full time secretary. Caguas offers perhaps a unique opportunity for an experimental ministry to light industry having the largest per capita employment in manufacturing on the island, and a larger number of plants than either Ponce or Mayaguez. If it were decided to exploit this opportunity, a second full-time man would be attached to the parish, but assigned to this work. Estimated \$16,000 for additional personnel and program.

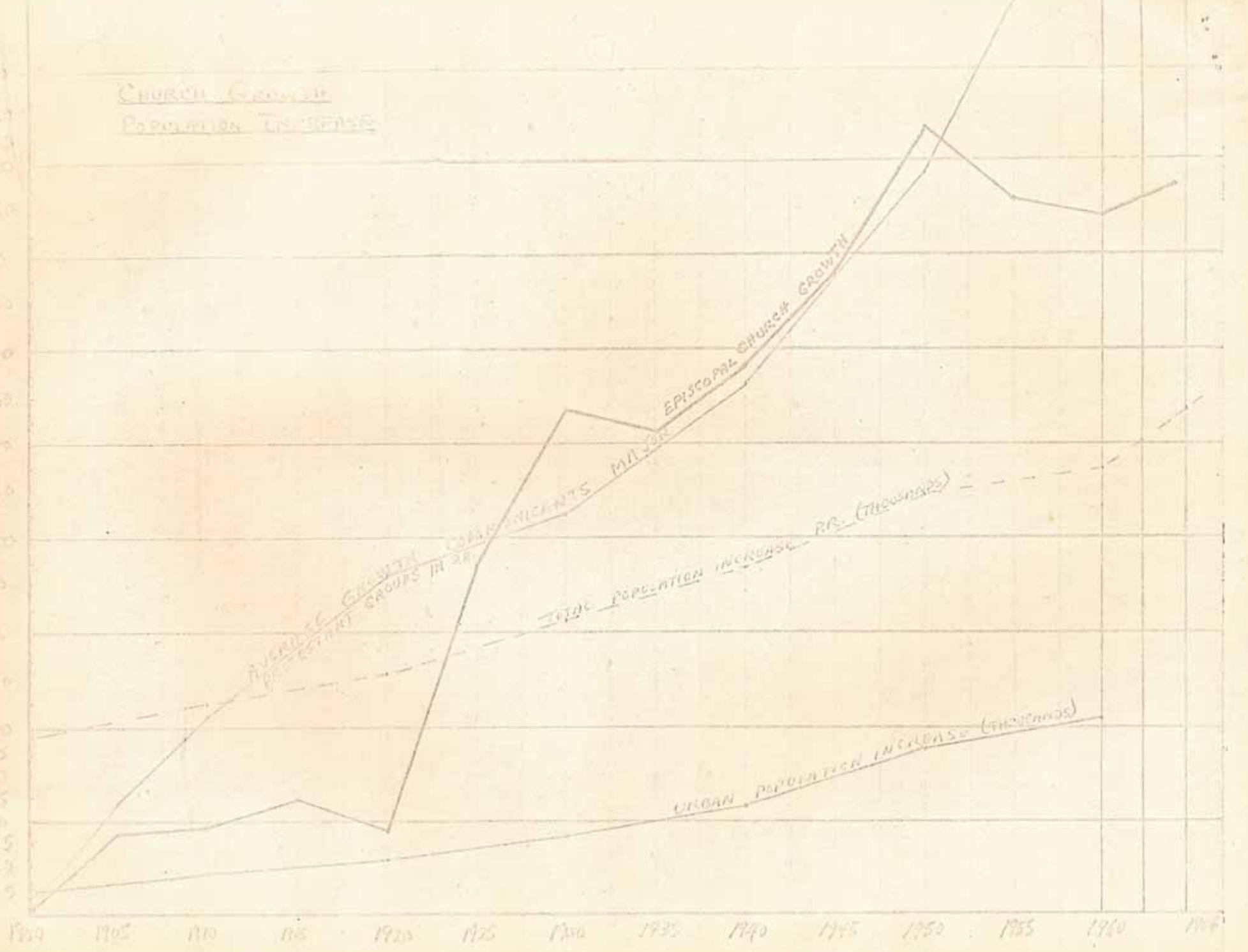
Transfiguration - Las Rubias Needs immediate replacement of unusable ~~rectory~~ *rectory* and parish hall. The latter should be expanded to become a community center, and recent federal government law should be investigated re construction of Community Center Facilities to see if we could not take advantage of its provisions. A Community development worker or youth worker should definitely be added to staff, if not two, one of which could serve as part time secretary and bookkeeper. Personnel and program budget possibly \$ 12,000.

St. Mark's-Magueyes Needs immediate construction of Parish Hall, but as in above situation, Federal Neighborhood Community Facilities benefits should be fully investigated. As stated in Poverty Proposal, a community development leader, a community youth organizer and trainer, a social worker, a nurse, a secretary and bookkeeper could all be added. On a limited budget, priority should probably be given to any two of the first three, with adequate provision of at least part-time secretarial help. Estimated budget \$ 14,000

Good Shepherd, Fajardo. Present facilities are adequate and community facilities available in near proximity. Present ~~staff~~ *staff* ordained staff is adequate, one for English ministry, one for Spanish, but to develop a special ministry to drug addicts both a registered nurse and a social worker plus program money are needed. Registered nurse might be available if social worker were hired by parish, and this would seem most advantageous arrangement in that the parish is already involved in community work with youth and poor. Budget needed \$8,000 with provision of part-time secretary.

University of Puerto Rico, Rio Piedras : \$50,000 already invested in land and old building near campus; Chaplain assigned full-time July, 1965. Office rented 1965-66 with Evangelical Council Chaplain; ecumenical proposal for on-campus Christian facility now before University administration. Strategy support and consultation extremely important at this formative policy stage. Funds for program now guaranteed beginning 1967, by Division of College Work; estimated annual budget \$2,500 - \$3,500. (Remaining funds assigned by Division to be used in Mayaguez and San German programs). Additional capital funds needed for on-campus construction \$200,000 to Ecumenical Center. Basic outlines of United Campus Ministry coming clearer at present.

Church Growth
Population Increase



21 of
clergy

EPISCOPAL CHURCH FINANCE & CLERGY INCREASE

\$225,000 (36)

\$200,000 (32)

\$175,000 (28)

\$150,000 (24)

\$125,000 (20)

\$100,000 (16)

\$75,000 (12)

\$50,000 (8)

\$25,000 (4)

1905 1910 1915 1920 1925 1930 1935 1940 1945 1950 1955 1960 1965

