



Prayer - Planning - Possibilities



Implementation Guide for
parishes not restructuring at this time



DIOCESE OF ERIE • PASTORAL PLANNING PROCESS
March 2017





Dear Brothers and Sisters in Christ,

After a robust and thorough effort, I trust you are as pleased as I am that we are finally implementing the parish restructuring portion of pastoral planning for the Diocese of Erie.

Although your parish is not experiencing any restructuring changes at this time, it's possible you have a new pastor. Even if you do not have a new pastor, this is an opportune time to review processes and refresh staff members concerning policies. Please be aware parishes that have previously had secondary churches or partner parishes must now conform to the guidelines established for newly merged or partnered parishes.

While I am happy we have arrived at this moment in pastoral planning, I know we still have a long road ahead of us. Our work is never accomplished with the flip of a switch. It's a process. As you review processes and policies, be patient with yourselves and with each other. In addition, please keep in mind that neighboring parishes that are partnering or merging are dealing with significant change. Reach out to them during the next weeks and months to offer support and to determine if there is any way you and your parish can be helpful. Make a special effort to look for and welcome visitors during this time of transition.

We gathered data and we studied it. We developed a preliminary plan and asked for feedback. The Presbyteral Council and I listened to that feedback and made significant adjustments before I announced my final decisions. And through it all, we prayed.

This *Implementation Guide for parishes not restructuring at this time* is designed to help you consider various aspects of parish operations that may need to be updated. Challenges are sure to appear and questions will arise. The Chancery, the Communications Office, the Finance Office and the Human Resources Office are all available to help.



Please remember this guide is designed to help you. I am relying on each pastor, with the assistance and ideas of staff members, volunteers and parishioners, to be intentional and creative in addressing the specific pastoral concerns that need to be met in each parish on an ongoing basis.

I look forward to being with you in the coming months, and to learning of the “new paths of possibility” you are discovering.

Sincerely yours in Christ,

The Most Rev. Lawrence T. Persico
Bishop of Erie

PASTORAL PLANNING TEAM



Rather than asking each pastor to create a pastoral planning team to help carry out numerous aspects of reviewing parish life, it seems this falls within the purview of work that should be accomplished by the pastoral council. Giving thoughtful and prayerful attention to this expanded role will pay dividends.

A trusted advisor or two from the parish staff, pastoral council, finance council or other organization can be extremely helpful working with the pastor in determining how the pastoral council can be used most effectively for this purpose.

Consider bringing the council together for fellowship, discussion and brainstorming about this topic. Encourage members to read this guide, available at www.ErieRCD.org/planning.htm, prior to meeting so they are prepared to bring ideas to the table. Pastoral Council members have strong connections to other parishioners who can work on various aspects of the review.

In addition to the logistics discussed in this guide, pastoral council members can be involved in a number of activities, including:

- + **Communications:** What vehicles might be used to keep parishioners apprised of new initiatives and changes in the parish?
- + **Ministries:** What is the best way for parishes to brainstorm ways their outreach efforts can be streamlined, refined or reinvented?
- + **Worship:** Consider how the parish expresses itself in prayer. What kinds of special events might be arranged to renew this aspect of parish life? What might be adopted on an ongoing basis?

The most important recommendation that can be made for the pastoral council team is that they review the *Parish Snapshot* that was submitted to the administrative offices of the diocese during the planning process. Each parish took the time to assess its strengths and weaknesses. This document is a great starting point for those who wish to begin determining priorities and setting goals. If you need a copy of your *Parish Snapshot*, please contact the Chancery.

.....

QUESTIONS FOR REFLECTION

Possible questions for consideration by parishes that are not restructuring at this time:

- How can we renew ourselves that we might be a more vibrant parish?
- Looking at our *Parish Snapshot*, what do we still need to work on?
- Are we aware of new people coming to Mass at our parish because of restructuring at other parishes?
- If so, how can we make them feel welcome? How might we extend this same welcome to others visiting our parish?
- How can we be more inviting and evangelizing?
- This time of transition for the Diocese of Erie is an excellent time to review the ministries, organizations and outreach efforts of each parish. Are efforts being duplicated? What needs are not being addressed? Have any organizations outlived their usefulness? Might this be an appropriate time to update the mission of various organizations and to seek new ways to collaborate within the parish?
- Is there any way we can show support for the parishes in our deanery?
- How can we help those parishes around us that are merging or partnering?
- Are there any new ways we can collaborate with other parishes?
- Statistics say that if the present trend continues, in 18 years, the Diocese of Erie will only have 36 active priests. What can we do to help derail that trend?
- Many parishes have Small Christian Communities to foster spiritual growth. Can we invite people from smaller parishes to join our groups if the opportunity is not available in their own parish?
- What creative efforts can we undertake to engage young adults, young families, and others in the life of the parish?
- What other questions might we consider and offer to other parishes that are not restructuring at this time?

Much of the information that follows in this guide is not new. As parishes that are merging and partnering need to reconsider several aspects of parish life, however, surely all can benefit from the opportunity to review, reflect on and reconsider how they want to move forward. A copy of *Key Indicators for a Vibrant Parish* can be downloaded at www.ErieRCD.org/pdf/pastoralplan_report2.pdf.

.....

PARISH FINANCE COUNCIL

Every parish is to have a Finance Council as stated in Canon 537. *The Parish Financial Practices Policy Manual for the Diocese of Erie*, which can be found at www.ErieRCD.org/financemanual.htm, includes a chapter with the diocesan norms that all parishes should review, whether they are updating membership in their Finance Councils or not. Among the topics are: membership requirements, meeting guidelines, a list of duties and responsibilities, the role of pastors and business managers and recommended practices.



Copies of the minutes of each Finance Council meeting must be retained for seven years.



PARISH PASTORAL COUNCIL

By diocesan law, parishes in the diocese are to have a parish Pastoral Council (cf. can. 536 §§1-2).

Copies of the minutes for Pastoral Council meetings are to be retained for seven years.

Although there are diocesan norms governing the term limits of Finance Council members, there are no such norms for members of the Pastoral Council.

.....

From the OFFICE OF FINANCIAL SERVICES

Parish restructuring will result in many improvements and increased efficiency in the financial administration of many parishes as well as in the administrative offices of the Diocese of Erie. The number of parish annual reports filed with the Office of Financial Services will decrease by about 25 percent, and the more detailed tracking of church building costs will aid in future planning decisions. These and other economies will result in significant cost savings and quicker access to important data.

The guidelines that follow will help your parish achieve efficient financial and administrative processes. Questions can be addressed by emailing Tom Burik, director of Parish Financial Services, at tburik@ErieRCD.org or by calling 1.800.374.3723, extension 185, or 814.824.1185.



The Parish Financial Practices Policy Manual
developed for the Diocese of Erie,
a valuable resource that addresses many questions,
is available at www.ErieRCD.org/financemanual.htm.

FINANCIAL REPORTING/DIOCESAN OBLIGATIONS

Every parish in the diocese files an annual parish report and budget. Each parish also has its own Catholic Services Appeal goal and diocesan assessments.

Separate financial reports are to be filed and maintained on an ongoing basis for each parish cemetery.

STAFF

Pastors and parish administrators should assess their needs on an ongoing basis, but this year of transition is a particularly opportune moment to make sure parish staffing is in line with parish needs. As per the *Parish Restructuring Preparation Guide* distributed last year, the following should be updated and readily available in each parish:

- A position profile for each full-time and part-time paid staff member of your parish in accordance with the new federal requirements through the Department of Labor. Sample profiles are included in this guide and available at www.ErieRCD.org/hr.htm.
- A list of the volunteers and their duties at the parish should be accessible.
- A list of the ministers and their roles at the parish should be accessible.

If staff changes are to be made, it will be helpful to work toward a change by June 30, 2017, with the end of the fiscal year. In addition, if staff changes or reductions need to be made, all job descriptions must be updated to reflect new staffing configurations and a selection process must be initiated. With regard to hiring, take steps to ensure that the hiring process complies with local, state and federal labor laws. If a parish changes its staffing, and a pastor chooses not to rehire any former staff members, he is encouraged to give the employees several months' notice before their positions are eliminated. Please refer to the section provided by the Human Resources Office for additional guidelines.

.....

RECORD-KEEPING

CHILD PROTECTION RECORDS

Please ensure that all records regarding child protection are in place for your parish, stored in a secure, locked file.

Records for all parish and school personnel, as well as regular and occasional volunteers, must be on file per the *Policy for the Protection of Children*, sections IIIA/3 and IIIB:

“Documentation for all compliance issues related to screening will be maintained by supervising personnel in a secure, locked file in the parish, school, agency or institution. Each person will have their own personnel file and files should be kept alphabetically so all documentation on a particular individual can be located in an efficient manner if necessary. These records must be kept indefinitely.”



SACRAMENTAL RECORDS

All sacramental records should be archived appropriately.

ADMINISTRATIVE RECORDS

All records such as Pastoral and Finance Council minutes, financial records, deeds and other administrative information for parishes should be stored in the parish office. Copies of the Finance Council and Pastoral Council minutes are to be retained for seven years. **Refer to page 3-3 of the *Parish Financial Practices Policy Manual* available at www.ErieRCD.org/financemanual.htm for details regarding records retention.**



.....

From the OFFICE OF HUMAN RESOURCES

As Bishop Persico has emphasized throughout the process, planning must become part of our ongoing approach. Careful consideration of human resources on a regular basis is essential for all parishes. Treating parish staff and volunteers with sincere respect and pastoral care should remain a priority.

Pastoral planning teams may offer suggestions to help your parish assess and determine staffing needs, as well as the best ways to achieve them in an equitable manner. Deacon Bill Saborsky, consultant to the Diocese of Erie for human resources, can assist with your questions and refer you to resources that will be helpful should changes be necessary. He can be reached by email at wsaborsky@ErieRCD.org, or by phone at 800.374.3723, extension 189, or 814.824.1189.

POSITION PROFILES

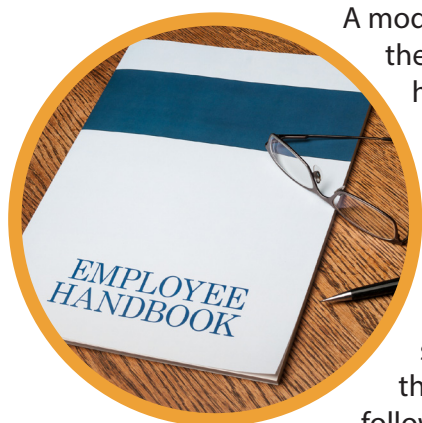
In the fall of 2016, all parishes received the *Parish Restructuring Preparation Guide*. The guide asked all parishes involved in partnerships to update all job descriptions and/or position profiles for every employee. Pastors should verify that this has been accomplished. If not, the preparation guide, along with sample job profiles, is still available at www.ErieRCD.org/planning.htm.

Remember that all positions must now be designated as either exempt or non-exempt per the U.S. Dept. of Labor. A worksheet to help pastors and business managers determine this status is included at the end of this guide and available at www.ErieRCD.org/hr.htm.

EMPLOYEE HANDBOOK

Does your parish have an employee handbook? If so, it should be reviewed to determine if it needs to be updated or if a new handbook needs to be developed. This is an ideal assignment that could be overseen by a member of the pastoral council.

A model for a parish handbook can be found at www.ErieRCD.org/hr.htm under the heading, *Developing a Parish Employee Handbook*. Example C includes a helpful tutorial.



STAFFING

If a parish ever determines changes need to be made in staffing, all job descriptions must be updated to reflect new staffing configurations and a selection process must be initiated. With regard to hiring, take steps to ensure that the hiring process complies with local, state and federal labor laws. Please follow the guidelines as described in the *Parish Restructuring Preparation Guide*.

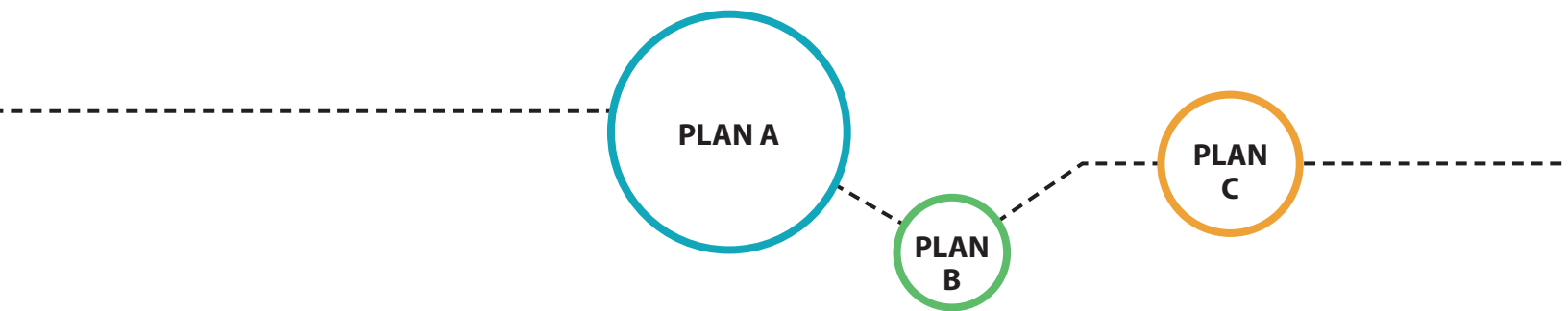
This time of transition for the Diocese of Erie gives all parishes, even those that are not restructuring at this time, the opportunity to look at its resources with fresh eyes. Pastors are encouraged to consider a thorough review of staffing needs. The Human Resources Office of the Diocese of Erie recommends this topic be addressed with staff as the review of staffing begins. Pastors should be open with staff

members, letting them know that every position and every staff member's role must be carefully evaluated in order to make the best, most efficient use of parish resources.

The Process

The Pastoral Council might create a subcommittee or a task force—in some cases simply naming an individual to serve in an advisory capacity to the pastor—to help formulate a staffing plan. One important step is for pastors to systematically meet with each current staff member, gaining as much insight as possible from the people who are currently employed by a parish. The information will be helpful, but staff members also will benefit from having the opportunity to be heard. The authority to hire staff rests with the pastor, and once a plan is developed, he needs to work with staff members, one-on-one, to develop plans for each individual. Having a plan in place early, and having met with all staff members to gather their insights, will facilitate this process. Some staff members may be preparing to retire; others may simply decide this is a good time to move on. While it is not at all a foregone conclusion that staff numbers would be reduced, in the case where someone will need to find employment elsewhere, the sooner they know, the more quickly they can begin looking for a new job.

.....



From the **CHANCERY OFFICE**

THE CELEBRATION OF SUNDAY, WEEKDAY, AND HOLY DAY MASSES

In accord with diocesan law, parish Sunday Masses and holy day Masses, and Mass on the evenings preceding them, may only be celebrated in parish churches or mission churches, while funerals and weddings may take place in any church (parish, mission or other secondary church) at the request of the parishioners or the family. Baptisms may be celebrated in any church in which a baptismal font is already in place.

In accord with diocesan norms, Mass on the evening preceding Sundays and holy days of obligation is not to begin before 4:30 p.m. except with an indult granted by the bishop.

The number of parish Masses scheduled for Sundays and holy days of obligation is not to exceed the total number which the priests assigned to parishes are lawfully permitted to celebrate. As a rule, this means one Mass per priest on weekdays, and two on Sundays. Pastoral need may occasionally require additional Masses, but these should not be scheduled as a regular practice. The provision of the universal law remains in place by which priests are always permitted to celebrate three Masses on All Souls Day and on Christmas Day, provided that they keep the stipend for only one Mass. Additional stipends should be forwarded to the Chancery Office for deposit into the Priest Retirement Fund.

In addition, according to diocesan law, there is to be only one Mass celebrated on the evening preceding Sundays and holy days of obligation. If your parish has a parish church and a mission church, then the time and place for that Mass is to be determined by the pastor, after having consulted the members of the parish Pastoral Council and the diocesan bishop.

Unlike Sunday Masses, weekday Masses and public devotions (e.g., novenas, Stations of the Cross, etc.) in missions and other secondary churches are at the discretion of the pastor. The faithful are always free to offer private devotions or prayer, provided the church is unlocked.



MASS INTENTIONS AND OTHER LITURGICAL REQUIREMENTS

The following items are not new, but this is an opportune moment for calling them to everyone's attention.

***Pro populo* Mass requirements**

Every pastor is personally obliged to offer Mass for the people (*pro populo*) entrusted to his care on all Sundays and all holy days of obligation. He is not to receive a stipend for this Mass (cf. can. 534 §1).

Because the offering of the *pro populo* Mass is a serious personal obligation of the pastor himself, arising from the spiritual relationship which he shares with his parishioners, he may not entrust the Mass to another priest, or celebrate it on a different day, *except when he is unable personally for some serious reason to celebrate the Mass himself* (cf. can. 534 §1). If multiple priests celebrate Sunday Masses in a parish, the pastor is to see to it that he personally always celebrates the *pro populo* Mass.

Parish administrators are bound by the same duties as pastors concerning the *pro populo* Mass (cf. can. 540 §1).

Satisfying multiple intentions in the same Mass

A change in the Mass schedule, especially possible in areas where new mergers and partnerships are taking place, could create a situation in which Mass intentions previously scheduled are now in conflict. When that happens, two Mass intentions can lawfully be satisfied within a single celebration of the Mass, provided that:

- The donors of the two intentions have been notified and agree to combine the intentions;
- The place and time of the Mass is publicly announced;
- The celebrant keeps only one stipend. As with any other bination stipend, the priest may not keep the second stipend but instead must send it to the Chancery Office, for deposit into the Priests Retirement Fund. (cf. can. 951 §1; Formerly, these were sent to the seminary, but are now to be sent to the Chancery).

The law does not permit such a combining of Mass intentions more than twice in a single week.

Pastors are to see to it that only single intentions for a given day are accepted from this point forward, so that all conflicts with previously scheduled Mass intentions should resolve themselves by January 1, 2018.

Reservation of the Holy Eucharist

The Eucharist *must* be reserved in all parish churches (cf. can. 934 §1, 1°).

The Eucharist *may* be reserved in another church (i.e., in a secondary church, whether it has mission status or not), but only with the permission of the bishop or episcopal vicar and provided that Mass is celebrated there at least twice a month (cf. can. 934 §1, 2° and can. 934 §2).



Churches in which the Eucharist is reserved are to be open for at least some hours each day, unless some grave reason (e.g., security concerns) intervenes (cf. can. 937). For churches in which the Eucharist is not reserved, pastors are encouraged to delegate deacons or trusted lay persons to unlock these churches occasionally to allow the faithful to enter for private prayer and devotion (cf. can. 1214).

Sacred objects and all items necessary for divine worship should remain in place within parish churches as well as mission and other secondary churches, for as long as the church remains in use, even in a limited way.

The titular solemnity of a church

In every church, whether it be a parish, mission or other secondary church, Mass is always to be celebrated on the solemnity of the church's titular feast (i.e., the feast indicated by the title of the church building). The Holy See has indicated that churches which are simply titled "Saint Mary," without any other description, are to celebrate their titular feast on August 15.

(Note: This is often thought of as the patronal feast of the parish, but in truth, it is the titular feast of the church building and follows the title of the church, regardless of the name of the parish. By extension, the titular feast of the church building also celebrates the community that worships within it.)



This Mass is to be celebrated as a solemnity with three proper readings, proper orations, *Gloria*, and creed, using the texts for the feast day.

It takes precedence over every other liturgical celebration except the Easter Triduum; Christmas; Epiphany; Ascension; Pentecost; the Sundays of Advent, Lent, and Easter; other Solemnities in the general calendar, All Souls Day, and the solemnity of the anniversary of the church's consecration.

The titular solemnity of a church is never suppressed. If it falls on one of these above-mentioned dates, then its observance is transferred to the first date thereafter which does not outrank it. In addition, if the titular feast occurs during Ordinary Time, its observance may be transferred to the nearest Sunday.

The solemnity of the anniversary of the consecration of a church

In every consecrated church, whether it be a parish, mission, or other secondary church, *but only if the church was truly consecrated*, Mass is always to be celebrated on the solemnity of the anniversary of the church's consecration. Pastors may need to consult parish records or the Chancery to determine if a church was ever consecrated, i.e., if the altar and walls were anointed with chrism.

(Note: The anniversary of the consecration [now called dedication] of a church recalls that Christ is the true Temple for every Christian, and we are the living stones of that Temple. As a result, the anniversary is always observed as a Solemnity of the Lord Jesus, and not of any particular saint after whom the church is named.)

This Mass is to be celebrated as a solemnity with three proper readings, proper orations, *Gloria*, and creed, using the texts from the Common of the Dedication of a Church.

It takes precedence over every other liturgical celebration except the Easter Triduum; Christmas; Epiphany; Ascension; Pentecost; the Sundays of Advent, Lent, and Easter; other solemnities in the general calendar, and All Souls Day.

The anniversary of a church's consecration is never suppressed. If it falls on one of these above-mentioned dates, then its observance is transferred to the first date thereafter which does not outrank it. Also, if the anniversary occurs during Ordinary Time, its observance may be transferred to the nearest Sunday.

.....

C O N T A C T us for more information

As parishes work through this guide, please remember the Chancery, the Communications Office, the Finance Office and the Human Resources Office are all available to help. Please begin by contacting the people listed below. If they cannot answer your questions, they will know who can.

The Chancery	MSGR. EDWARD LOHSE Vicar General ELohse@ErieRCD.org 814.824.1135
Communications Office	ANNE-MARIE WELSH Director AMWelsh@ErieRCD.org 814.824.1167
Finance Office	TOM BURIK Director of Parish Financial Services TBurik@ErieRCD.org 814.824.1185
Human Resources	DEACON BILL SABORSKY Consultant WSaborsky@ErieRCD.org 814.824.1189

Exempt/Non-Exempt Worksheet

(to be completed for all non-teacher employees – keep in personnel file)

In order to clearly identify those employees who are, or are not, exempt from current regulations governing the Fair Labor Standards Act, it is necessary that a worksheet such as this be completed for every non-teacher employee. It is necessary to do this to make certain that your pay practices comply with current federal law. *The fact that you may presently be paying someone on a salaried basis does not mean that the person qualifies as an exempt employee. It is crucial that you complete this worksheet to ensure proper classification of employees.*

Employee: _____	Job Title: _____
<p>Salary Test:</p> <p>Annualized wages: _____</p> <p>Gross weekly wage: _____</p>	<p>If employee’s annualized wages total less than \$23,660 per year or \$455 per week and is not employed as a computer specialist, STOP HERE! This employee is NON-EXEMPT and is entitled to compensation of 1.5 times his or her standard hourly wage for all hours worked over 40 hours per week (Sunday through Saturday). If employee’s annualized wages total more than \$23,660 per year or \$455 per week, continue with the duties tests.</p>
<p>Note Regarding Blue Collar Workers</p>	<p>The exemptions provided by FLSA Section 13(a)(1) apply only to “white collar” employees who meet the salary and duties tests. The exemptions do not apply to manual laborers or other “blue collar” workers who perform work involving repetitive operations with their hands, physical skill and energy. Non-management employees in production, maintenance, construction and similar occupations such as carpenters, electricians, mechanics, plumbers, iron workers, craftsmen, operating engineers, longshoremen, construction workers and laborers are entitled to minimum wage and overtime premium pay and are not ever subject to an exemption under the FLSA.</p>
<p>Duties Tests: If an employee meets the stated criteria in any one of these areas listed below, that person is exempt from receiving overtime pay.</p>	
<p>Executive Exemption</p> <p>Meets: _____</p> <p>Does not meet: _____</p>	<p>The employee’s primary duty must be managing the enterprise, or managing a customarily recognized department;</p> <p>The employee must customarily and regularly direct the work of at least two or more other full-time employees or their equivalent; and</p> <p>The employee must have the authority to hire or fire other employees, or recommend the hiring, firing, advancement, promotion or any other change of status of other employees.</p>
<p>Administrative Exemption</p>	<p>The employee’s primary duty must be the performance of office or non-manual work directly</p>

<p>Meets: _____</p> <p>Does not meet: _____</p>	<p>related to the management or general business operations of the employer or the employer's customers; and includes the exercise of discretion and independent judgment with respect to matters of significance.</p>
<p>Professional Exemption</p> <p>Meets: _____</p> <p>Does not meet: _____</p>	<p>The employee's primary duty must be the performance of work requiring advanced knowledge, defined as work which is predominantly intellectual in character and which includes work requiring the consistent exercise of discretion and judgment;</p> <p>The advanced knowledge must be in a field of science or learning; and involve advanced knowledge customarily acquired by a prolonged course of specialized intellectual instruction.</p>
<p>Creative Professional Exemption</p> <p>Meets: _____</p> <p>Does not meet: _____</p>	<p>The employee's primary duty must be the performance of work requiring invention, imagination, originality or talent in a recognized field of artistic or creative endeavor.</p>
<p>Computer Employee Exemption</p> <p>Meets: _____</p> <p>Does not meet: _____</p>	<p>The employee must either meet the salary test (above) or, if compensated on an hourly basis, at a rate not less than \$27.63 an hour, or at least \$913 per week.</p> <p>The employee must be employed as a computer systems analyst, computer programmer, software engineer or other similarly skilled worker in the computer field performing the duties described below;</p> <p>The employee's primary duty must consist of:</p> <ol style="list-style-type: none"> 1) The application of systems analysis techniques and procedures, including consulting with users, to determine hardware, software or system functional specifications; 2) The design, development, documentation, analysis, creation, testing or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications; or 3) The design, documentation, testing, creation or modification of computer programs related to machine operating systems.