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# Parish Restructuring Preparation Guide



**PASTORAL PLANNING PROCESS**  
Diocese of Erie - March 2024



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## *Dear Brothers and Sisters in Christ,*

Pastoral planning indeed has become a way of life for the Diocese of Erie. Begun in earnest in 2014, we have continued to study, to discern and to reconfigure our parishes and our programming to meet the needs of the day.

Without knowing that Pope Francis was going to call us into greater synodality, our approach to planning has been synodal from the beginning. Whether on the diocesan, regional or county level, we have created preliminary plans, asked for feedback from both individuals and parishes, and refined plans based on that feedback before asking the Presbyteral Council to weigh in. I've been able to finalize decisions grounded in the wisdom of each of these perspectives.



Pastoral planning and parish restructuring are complex yet necessary initiatives. While we have hope for a brighter future, we have to respond to our realities, including fewer Catholics participating in parish life and a decrease in the number of priests available for parishes.

We have published implementation guides for parishes that are merging, partnering or not restructuring at this time. Each guide is designed to help parishes with the significant logistics involved. Everything from faith formation and finances to human resources and hospitality is addressed.

The weeks and months before a plan is implemented are very important. The guide you are now holding gives parishes an opportunity to prepare for the coming transition. While we cannot ignore the many logistics that need to be addressed, I want pastors and parishes to be mindful that this is a key spiritual moment in the pastoral planning process.

I have noted many times that the reason we are going through this process is to ensure the best possible pastoral care of souls. It is vital that pastors use the time before a change to prepare their people for the coming transition. That is why we are providing a companion guide with several prayer services to use in parishes.


During the coming weeks, I invite your parish to celebrate the many blessings you currently enjoy. The seasons of the liturgical year give us especially rich moments for gratitude and reflection. They may also inspire you to create additional opportunities for spiritual growth.

I hope that parishes preparing to partner or merge will plan a few joint opportunities, both social and spiritual, during the coming weeks. Why not get to know each other by working on a project for those in need in your community? The tagline we've been using during planning has three words: prayer, planning and possibilities. Even as we focus on prayer, it's also time to explore the possibilities.

Finally, there are a number of things parish communities can do to get their houses in order prior to the partnerships and mergers that will occur. The Preparation Guide is a tool. Very little of the information needs to be shared with the administrative offices of the diocese. It is mainly intended to be of help to pastors and parish staff as the announced changes are implemented in the future. But the more each parish can accomplish before the plan is implemented, the easier the transition will be.

Thank you, pastors and parish leaders, for your prayer, your support and your commitment not only to the plan, but also to the work of the Lord.

*Sincerely yours in Christ,*

A handwritten signature in cursive script that reads "Lawrence T. Persico". The signature is written in black ink and is positioned to the left of the typed name.

The Most Rev. Lawrence T. Persico  
Bishop of Erie

# Q & A

## FREQUENTLY ASKED QUESTIONS about pastoral planning

The following section was developed in response to questions that are often asked when preliminary plans are announced. Please feel free to print as an entire insert or one at a time in your bulletins or other publications.

### Q: How were decisions made on each parish?

**A:** Bishop Persico made the decisions based on the recommendations of the Pastoral Planning Committee and after careful consultation with the Presbyteral Council. He also listened to the feedback submitted by parishioners in each affected region of the diocese. The Pastoral Planning Committee identified objective criteria before making their recommendations. They include:



- The **geographical distances** between parishes.
- The potential for population growth and **demographics** for each region of the diocese.
- Factors including Mass attendance trends, financial status, unnecessary duplication of ministries and staffing, and Mass times.



- The current and projected number of active priests serving in the Diocese of Erie, as well as the declining number of active Catholics in the region were also taken into consideration.

After preliminary plans were presented, parishioners in affected parishes were invited to offer feedback. This was then taken into serious consideration by the Pastoral Planning Committee in preparing the final plan.

Bishop Persico and the vicar general also worked closely together, conferring one-on-one to gain insights from pastors in the affected parishes as a final plan was developed.

Bishop Persico's goal continues to be ensuring the Eucharist is made available to all parishioners in the 10,000-square-mile Diocese of Erie each Sunday in a setting with a strong foundation and the capacity to build into life-giving communities where the Gospel is proclaimed and people of all ages are able to grow in their relationship with Jesus Christ.

In addition to quantitative data, qualitative data and human factors were considered. In some cases, the presence of a priest of retirement age who is willing to continue serving in his current parish means a parish may be able to remain unchanged for now. Each parish situation has many nuances and many considerations. Bishop Persico and his advisors take the big picture into consideration with each decision made. There were no foregone conclusions. No decisions were made about any parishes without studying the criteria and listening to the feedback, the data and the Presbyteral Council.

The bishop has emphasized that the planning we are doing is not just for today, but for the future. As we carry out the mission of the Gospel, he doesn't want us simply to survive; he wants us to thrive.

In the final analysis, Bishop Persico himself had to make the decisions regarding each parish, in answer to the question: Considering the concrete circumstances with which we are dealing, what is the best possible manner to provide for the care of souls?

**Q: What about all the priests who are working at St. Mark Catholic Center, Gannon University and in Catholic schools?**

**A:** Only one priest works full-time at St. Mark Catholic Center: Bishop Lawrence Persico. All of the other priests including the vicar general, chancellor, director of the Office for Divine Worship, judicial vicar, and more either serve as pastors or have responsibility for special ministries in addition to their positions at St. Mark.

This also holds true for the priests working at Gannon University, the sole diocesan university in our commonwealth.

Parents across the diocese consistently ask for the presence of priests in our schools, understanding its importance in generating new vocations. The bishop is trying to balance this priority with the great needs in parish life. Priests are generally assigned as both the pastor of a parish and the chaplain of a school.

Lastly, it should be noted that all of these priests are assisting with Sunday Masses in parishes, universities, convents, or other institutions.

**Q: Other dioceses are bringing in international priests so they can keep parishes open. Why can't we use this option?**

**A:** Bishop Persico believes a healthy diocese should be able to grow its own vocations. He has seen many situations in which the cultural and language barriers of international priests have made it difficult at times for parishioners. For now, he does not feel this is a viable option for our diocese, although he has not ruled it out for future consideration.



**Q: Why can't the bishop ordain married men or even women?**

**A:** Some may be surprised to learn that our brothers and sisters in Christian denominations that ordain both married men and women are experiencing a vocation crisis very similar to what is going on in the Catholic Church. Apart from that reality, most people recognize this is not actually an option for Bishop Persico. The ordination of married men is not supported by the ecclesiastical discipline of the Latin Rite, to which the Diocese of Erie belongs, although there are limited exceptions to this discipline. The ordination of women is prohibited by the Sacred Tradition and infallible magisterial teaching of the Catholic Church.

**Q: Why aren't we just closing the churches of the parishes that are merging? Won't we waste money keeping these buildings open?**

**A:** It is important to recall that parishes are communities of persons, and churches are sacred buildings given over in perpetuity to divine worship. While smaller communities may merge to form a larger and stronger community, it is not possible to merge buildings. They remain where they were built.



It is also important to note that churches are different from all of the other buildings which a parish may happen to own. The Catholic Church takes very seriously the fact that churches are solemnly blessed or consecrated for the exclusive use of divine worship, for as long as they continue to stand. This is a reality which is not lightly set aside. The result is that these churches are to remain in use for divine worship, both public and private. They are available for devotional prayer, and retain their sacred furnishings and anything necessary for worship, even if Mass is celebrated there only on a limited basis. Only when and if grave reasons indicate that the church should no longer be used for worship could the pastor ask the bishop to begin a process to lawfully remove the consecration or blessing, so that the building would cease to be a church.

This is one reason why it is important that sacred furnishings should remain in place at secondary churches, whether or not they have mission status. All churches should be fully equipped for divine worship, including both public liturgy and private devotions.

As a pastor and as a canon lawyer, Bishop Persico understands it is best for each parish community to discern if there are grave reasons arguing in favor of closing its church. If and when that day arrives, then the pastor, together with the members of the parish finance council and parish council, can petition the bishop to remove the building's consecration or blessing. Some parishes with secondary church(es) may arrive at that point relatively quickly, and others may never arrive there. But the decision to ask the bishop to close a church rightly belongs to the people in the parish, under the leadership of their pastor.

**Q: What will happen to a church building if a parish petitions the bishop to close it, and the bishop grants the petition?**

**A:** If it is not going to continue in use as a Catholic church, such a building must first have its consecration or blessing removed. At that point, it is no longer a church. After all of the sacred furnishings have been removed, the parish can use the building for purposes other than sacred worship, or it can be rented or sold under certain circumstances, with permission of the bishop. If rented or sold, the proceeds would go to the parish which owned the building. The Chancery and the Finance Office can provide further details about what is involved in leasing or selling a former church building, under what conditions this can be done, etc.

**Q: How will priest assignments be made? Will we have to lose our pastor?**

**A:** The Clergy Personnel Board, which has the responsibility of advising the bishop on priest assignments, will continue to make recommendations to the bishop for this purpose. This is a complicated process, because moving even one priest can create a domino effect.

Bishop Persico tries to create as little disruption as possible concerning assignments during times of transition. Please pray for all of our priests as they help shepherd parishes through change and manage the change in their own lives.

**Q: Our pastor says he is willing to say Mass at our church even though we don't have mission status in the new plan.**

**A:** Mass on other days of the week is permitted, but Mass on Sundays and holy days and on the evenings preceding them will not be allowed in secondary churches without mission status. Bishop Persico is expecting pastors to carry out the plan, abiding by diocesan law

as established. Mission churches and other secondary churches may not act on their own, recruiting retired priests to come to their churches for Masses outside of the official parish schedule. The retired priests who are willing and able to say Mass need to be available on Sundays and holy days as substitutes for priests and pastors at established parishes, convents, universities, and other approved locations across the diocese.

**Q: Our church has been an anchor in the community/neighborhood. I am worried about the outreach efforts that will be lost.**



**A:** Bishop Persico has commented that such concerns are heartening as they demonstrate the commitment people have to living out the Gospel. At the same time, he notes that there is nothing in the pastoral plan which would prevent anyone from continuing the outreach which is already in place. It can take time, creativity, patience and innovation, but parishioners are encouraged to continue established outreach efforts. New parish configurations may mean more people will be available to grow these ministries.

**Q: What about our assets and liabilities? Will separate lines be kept in the budget?**



**A:** There is a different answer for parishes that have been merged and parishes that are partnered. Merging is an interim step; the end result is a single, larger parish. Once two or more parishes merge, all of their assets and liabilities become the assets and liabilities of the newly enlarged parish. The enlarged parish now has all of the members, all of the assets, and all of the liabilities of the formerly separate parishes. The general principle is simple: the assets and liabilities follow the people. None of it goes to the administrative offices of the diocese.

Secondary churches, both those with mission status and those without, will not have separate incomes (the income will simply be that of the combined larger parish), but just as with any building owned by the parish, they will continue to have separate expenses. Bishop Persico is asking that all expenses for these secondary churches be maintained as separate line items. This will allow parishes to have a clear picture of the costs involved in maintaining them.

Partnered parishes will continue to maintain their own, separate budgets and their own finance councils.



## PRAYER RESOURCES to help prepare the parish

The time between the announcement of restructuring decisions and their implementation offers a valuable opportunity for prayerful reflection and preparation. Prayer should be the first activity which parishes undertake to prepare for implementation; all other means of preparation flow from prayer and come back to it. Depending on the unique experience of each parish, that prayer may have differing intentions and be expressed in a variety of ways.

The Office for Divine Worship has created a number of prayer resources for parishes to give voice to the varied experiences of parishioners during this time of transition.

*Included in a companion document and available for downloading at <https://eriercd.org/planning-downloads.html> are prayers and prayer services that can be used in a number of situations.*

All parishes, including those parishes that are not experiencing a significant change at this moment, are encouraged to use these resources. The prayer services are designed to be used by small groups within the parish community or by the whole parish community. In addition, parishes may choose to incorporate aspects of the offerings, such as intercessions and reflection time, into their regular worship.



## STAGES OF GRIEF

Parishioners will experience a wide variety of emotions in the coming weeks and months, both before and after parishes are merged or partnered. Many will likely feel some aspects of grief.

- 1 **Shock** – Initial paralysis at hearing unwelcome news
- 2 **Denial** – Trying to avoid the inevitable
- 3 **Anger** – Frustrated outpouring of bottled-up emotion
- 4 **Bargaining** – Seeking in vain for a way out
- 5 **Depression** – Final realization of the inevitable
- 6 **Testing** – Seeking realistic solutions
- 7 **Acceptance** – Finally finding the way forward

Parish leaders need to respond to their fellow parishioners, helping those who experience loss and grief. Ignoring them or dismissing their feelings is not productive. In most cases, it will help a great deal if you allow them to voice their concerns, listening with an understanding heart. Answering concerns, point by point, may not necessarily bring the appropriate response, although you might want to refer them to the Q & A that has been provided. Talk through resistance to change with a gentle effort to build consensus. Understand that many people have an emotional attachment to their parish and to their church. It may take some time for them to be at peace with the change.

## Definitions: **MERGING, PARTNERING, AND STAND-ALONE**

**MERGING** is a **transitional step** in which one parish community is subsumed into another. Merging takes place on the effective date of the bishop's decree. At that time, merging parishes will combine to form a newly enlarged parish. That newly enlarged parish will either stand alone or be partnered with another.

### **A PARTNERED PARISH**

The **partnered parish** is a canonically distinct parish with its own:

- parish church
- finances and finance council

*But it shares with another parish:*

- one pastor
- one pastoral (parish) council
- one staff and office
- one focus on mission and ministry (guided by a shared diocesan vision)

### **A STAND-ALONE PARISH**

The **stand-alone parish** is a canonically distinct parish with its own:

- pastor
- parish church
- finances and finance council
- pastoral (parish) council
- staff and office
- focus on mission and ministry (guided by a shared diocesan vision)

## Definitions: PARISH AND CHURCH

The Catholic Church is governed by church law, most of which is found in the various canons (norms) contained in the *Code of Canon Law*. There are specific canons which define a church and a parish, and which distinguish the differences between the two.

The following definitions were supplied in 2016 by now-Bishop Edward Lohse, JCD. The meaning of some of the more technical terms or phrases are included in parentheses.



### PARISH

#### What do the canons say?

(c. 515 §1)\* A parish is a certain (= clearly defined) community of the Christian faithful stably constituted in a particular church (= diocese), whose pastoral care is entrusted to a pastor (*parochus, i.e., priest entrusted with the care of a parish*) as its proper pastor (*pastor, i.e., literally, a shepherd*) under the authority of the diocesan bishop.

*\* c. 515 §1 is a way of citing canons in the Code of Canon Law. It refers to "canon 515, paragraph 1." The entire Code of Canon Law is readily available online.*

(c. 515 §2) It is only for the diocesan bishop to erect, suppress, or alter parishes. He is neither to erect, suppress, nor notably alter parishes, unless he has heard the presbyteral council.

(c. 526 §1) A pastor is to have the parochial care of only one parish (= stand alone); nevertheless, because of a lack of priests or other circumstances, the care of several neighboring parishes can be entrusted to the same pastor (= partnered).

#### What does this mean, practically speaking?

A parish is a community of the faithful within a diocese, having a well-defined membership with its own proper pastor assigned by the bishop. The two types of parishes foreseen in the law are stand-alone and partnered. Only the bishop has the authority to create, suppress or alter parishes.

### CHURCH

#### What do the canons say?

(c. 1214) By the term church is understood a sacred building designated for divine worship to which the faithful have the right of entry for the exercise, especially the public exercise, of divine worship.

#### What does this mean, practically speaking?

A church is a sacred building that has been permanently set apart, either by consecration or solemn blessing, exclusively for the worship of God. Except for some grave reason, this consecration or solemn blessing endures as long as the building continues to stand. If the general public is welcome to worship in the sacred building, then in law it is a church, regardless of what it is called.

By contrast, seminary chapels, convent chapels and hospital chapels are not intended for the use of the general public. For this reason, although they are sacred places, they are not churches.

## DIOCESAN LAW

The bishop has promulgated particular law (i.e., diocesan law) which is in force everywhere in the diocese. In doing so, he sets the parameters within which pastors are free to guide pastoral ministry within their respective parishes. The following diocesan laws took effect on February 13, 2017:

### ON THE STRUCTURING OF PARISH FINANCE COUNCILS

§1 Each parish in the diocese is to have its own finance council, under the direction of the pastor or parochial administrator who administers the finances of the parish, as required by c. 537 of the *Code of Canon Law*.

§2 In a stand-alone parish, all members of the finance council are to be parishioners in good standing of that same parish. In partnered parishes, the members of the finance council may either all be taken from the parish itself, or be taken in equal proportion from each of the partnered parishes. (See below for further explanation.)

§3 The finances of partnered parishes, as well as all of their temporal goods, assets and liabilities, are not to be commingled in any way whatsoever.

#### **What does this mean, practically speaking?**

In partnered parishes, each parish must still have its own finance council, but there are two options for how that finance council can be formed.

The first option is for the membership of the finance council to be made up entirely of parishioners from its own parish. In this way, each separate parish finance council would have its own unique set of members.

The second option is that the members of the finance council could include parishioners, in equal proportion, from each of the partnered parishes. In this way, the separate parish finance council for each parish would actually have identical members. Using this method, the members could have a better sense of the financial health of the entire Catholic community in that locale.

Remembering that the separate finances of the partnered parishes cannot be commingled in any way, there is nothing to prevent the different parish finance councils from meeting on the same evening, one right after the other, as long as it is clear that the first meeting for Parish A with its agenda and minutes has concluded, and the next meeting for Parish B with its own agenda and minutes is beginning.

### ON THE STRUCTURING OF PARISH PASTORAL COUNCILS

#### **What do the norms of the Diocese of Erie say?**

§1 Every stand-alone parish in the diocese is to have its own pastoral council. All members of that council are to be parishioners in good standing of that same parish (cf. c. 536 §§1-2).

§2 Partnered parishes are to share a single parish pastoral council which has an equal number of members in good standing from each of the partnered parishes (cf. c. 536 §§1-2). Partnered parishes are likewise to share a single office and staff.

## ON THE CELEBRATION OF SUNDAY, HOLY DAY, AND WEEKDAY MASSES

§1 On Sundays and holy days of obligation, as well as on the preceding evenings, all parish Masses are to be celebrated within the parish church itself or in a lawfully designated mission church (cf. c. 835 §1 and c. 838 §4).

§2 Pastors of partnered parishes are to celebrate only one Mass on Saturday evening and on the vigil of holy days of obligation, regardless of the number of parishes which are partnered. The time and place for that Mass is to be determined by the pastor after having consulted the members of the shared pastoral council and after having consulted the diocesan bishop (cf. c. 835 §1 and c. 838 §4). Pastors who discern a need for more than one Mass on Saturday evening and on the vigil of holy days of obligation must request an indult from the bishop.

§3 The number of parish Masses scheduled for Sundays and holy days of obligation are not to exceed the total number which the priests assigned to reside in the parish are lawfully permitted to celebrate.

### What does this mean, practically speaking?

Sunday Masses and holy day Masses may only be celebrated in parish churches or secondary mission churches.

In partnered parishes, only one parish will have a Saturday evening Mass. Parishes requiring special consideration must request an indult from the bishop.

If only one priest is assigned to reside in the parish, then the number of weekend or holy day Masses is not to exceed three (one vigil, two on the day itself, cf. c. 905 §2). If two priests are assigned to reside in the parish, then the number of weekend or holy day Masses is not to exceed five (one vigil, four on the day itself, cf. c. 905 §2). By virtue of the diocesan faculties granted by the bishop, priests may celebrate a third Mass on a Sunday or holy day of obligation if pastoral necessity requires it on a given occasion, but this is to be understood as an exception, not the rule (cf. *Diocesan Faculties*, Sacrament of the Most Holy Eucharist, b).

Funerals and weddings may take place in any church (parish, mission, or other secondary church) at the request of the parishioners or the family.

Weekday Masses and public devotions (e.g., novenas, communal 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 that the church is unlocked.

The Eucharist may be reserved in mission or other secondary churches, with the permission of the bishop, and provided that Mass will be celebrated there at least once every two weeks (cf. c. 934 §1, 2°). If the Eucharist is reserved, the church is to be open for some hours each day (cf. c. 937).



## Forming a **TRANSITION TEAM** to help the parish prepare

Implementing parish restructuring is no small task. Whether you are remaining as a stand-alone parish, merging or partnering with another parish, each pastor is invited to create a transition team to help carry out the process. More details about this team may be found in the implementation guides for parishes that are merging, partnering, or not experiencing change at this time. Implementation guides may be downloaded at <https://www.ErieRCD.org/planning-downloads.html>.



Pastors are encouraged to work on a list of recommendations for this team as soon as possible. In addition to the names of parishioners whom the current pastor would recommend to the incoming pastor, a brief description of the gifts each person might bring to the team should be included.

Giving thoughtful and prayerful attention to the membership of this team will pay dividends.

If you have a written history of your parish, please make sure it is readily available for those who will be involved on the transition team. Being mindful and respectful of the past will help ease the parish into the future.



## INVENTORY of physical, financial and human resources



**Staff, ministry volunteers and other parish leadership may be helpful to the pastor in putting this information together.**

### PHYSICAL ASSETS INVENTORY

During the next few months, a basic inventory of all of the parish's belongings should be taken. Following the same procedure insurance companies require, a narrated video inventory will suffice.

This can be done using a smart phone or a video camera and is an ideal project to be done with the assistance of a parishioner. The final video should be saved on a flash drive stored in the parish safe.

*The video should include:*

- A list of all buildings including their current use, age and condition
- All equipment in the church, the rectory, the office and any additional buildings
- Office equipment and furnishings including computer hardware and software
- Household (rectory) equipment and furnishings including appliances, furnishings, art and artifacts that do not belong to clergy
- Sacramentals including sacred vessels, vestments, sacred art
- Building and grounds maintenance equipment including:
  - Lawn mowers
  - Snow blowers
  - Tractors
  - Garden tools
  - Maintenance equipment
- Vehicles including automobiles, vans and snowplows



A set of all keys to all buildings on the parish grounds should be available for the new pastor, as well as a list of who else has keys for each building and file cabinet.

### FINANCIAL ASSETS/LIABILITIES INVENTORY

An updated report on the current budget should be available. In any merger or partnership, one of the first meetings upon the arrival of the pastor should be with the business manager(s) of all of the parishes and churches involved.

*The following should be readily available for each new pastor:*

- A copy of the operational budget for the parish
- All usernames and passwords for parish accounts
- The combinations to all safes
- All usernames and passwords for parish social media accounts

*Information on all assets should be gathered including:*

- Savings - Updated information concerning bank accounts and credit cards should be available for all accounts.
- Investments
- Endowments - All files on donations from benefactors, along with legal instructions on their intent and/or restrictions, need to be in order.
- Cash on hand
- Bank accounts

*Information on all liabilities should be gathered including:*

- Debts
- Credit cards

## **PARISH RECORDS**

Records are essential to understanding the history and functioning of a parish. While pastors come and go and the composition of the congregation changes over time, records are the one constant for learning how a parish evolved to its current position.



Please make sure all sacramental registers and cemetery registers (plot books, accounts and finance records, etc.) are updated and easily accessible.

Please include a list of all of the former parishes that have records on file with your parish, and spanning which years. **When the list is updated, please send it to [chancery@ErieRCD.org](mailto:chancery@ErieRCD.org).**

In addition, any written history of a parish should be shared with the new pastor, as well as several recent bulletins and the minutes from pastoral and finance councils.

A list of traditions or annual events that are especially important to a parish should be created for the pastor.

## **HUMAN RESOURCES INVENTORY**

As we continue pastoral planning in the Diocese of Erie, it is imperative that parishes have the following information in order. This is the only portion of the preparation guide that will be reviewed by the Finance Office when your parish is audited.

Having this information readily available is necessary whether the parish is merging, partnering or remaining stand-alone.

- How many full-time staff members does the parish have?
- **Each full-time position must be supported by a written Position Profile/Job Description that includes its identification as exempt/non-exempt according to the Wage and Hour Federal Regulations.** There is no need to reinvent the wheel:

A sample position profile is included with this guide (see pages 21-22.)

Additional samples can be found at <https://ErieRCD.org/Human-Resources.html>

- How many part-time staff members do you have?
- **Each part-time position must be supported by a written Position Profile/Job Description that includes its identification as exempt/non-exempt according to the Wage and Hour Federal Regulations.**
- If other workers are paid and recorded on a Form 1099, has their pay status been validated according to current wage and hour regulations?

Please make sure all child protection clearance files are up-to-date for parish employees and volunteers.

## MINISTRY INVENTORY

Parishes offer a variety of ministries and outreach efforts. It may be helpful to gather information about them, including:

- How many students does the parish have in religious education?
- How many catechists does the parish have?
- What kinds of training would be most helpful for parish volunteers?
- What programs are offered for adult faith formation?
- Are there any Small Christian Communities in the parish?
- What is being done to reach out to the community beyond the parish?



## Exempt/Non-Exempt Worksheet

(to be completed by 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:
<b>Salary Test:</b>  Annualized wages: _____  Gross weekly wages: _____	If employee's annualized wages total less than <b>\$35,568</b> per year or <b>\$684</b> 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 hourly wage for all hours worked over 40 hours per week (Sunday through Saturday) If the employee's annualized wages total more than <b>\$35,568</b> per year or <b>\$684</b> per week, continue with the duties test.
<b>Note regarding Blue Collar Workers</b>	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, craftsman, operating engineers, dock workers, construction workers, and laborers are entitled to minimum wage and overtime premium pay and are not ever subject to an exemption under the FLSA.
<b>Duties Test:</b> If an employee meets the stated criteria in any one of these areas listed below, that person is exempt from receiving overtime pay.	
<b>Executive Exemption</b>  <b>Meets:</b> _____  <b>Does not Meet:</b> _____	The employee's primary duty must be managing the enterprise, or managing a customarily recognized department;  The employee must customarily and regularly direct the work of at least two or more other full-time employees or their equivalent; and  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.
<b>Administrative Exemption</b>  <b>Meets:</b> _____  <b>Does Not Meet:</b> _____	The employee's primary duty must be the performance of office or non-manual work directly 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><b>Professional Exemption</b></p> <p>Meets: _____</p> <p>Does Not Meet: _____</p>	<p>The employee’s primary duty must be the performance of work regarding advanced knowledge, defined as work which is predominantly intellectual in character, and which includes work requiring the consistent exercise of discretion and judgement;</p> <p>The advanced knowledge must be in the field of science or learning; and involve advanced knowledge customarily acquired by a prolonged course of specialized intellectual instruction.</p>
<p><b>Creative Professional Exemption</b></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><b>Computer Employee Exemption</b></p> <p>Meets: _____</p> <p>Does Not Meet: _____</p>	<p>The employee’s primary duty must be the performance of work as a computer systems analyst, programmer, software engineer or similarly skilled work in the computer field performing a) application of systems analysis techniques and procedures, including consulting with users to determine hardware, software or system functional specifications; or b) design, development, documentation, analysis, creation, testing or modification of computer systems or programs, including prototypes, based on and related to user or system design specification; or c) design, documentation, testing, creation or modification of computer programs based on and related to user or system design specifications; or a combination of the duties described above, the performance of which requires the same level of skills. Examples: system analyst, database analyst, network architect, software engineer, programmer.</p>
<p><b>Outside Sales Exemption</b></p> <p>Meets: _____</p> <p>Does Not Meet: _____</p>	<p>The employee’s primary duty must be the performance of sales work off the company’s premises and whose primary duties include making sales or obtaining order or contracts for services or for the use of facilities for which the client or customer pays. This employee is customarily and regularly away from the company’s place of business while performing such duties. Examples: sales representative, account manager, business development representative.</p>

**St. John Paul II Parish**

Position Profile

**Job Title:** Parish Secretary  
**Department:** Parish Administration  
**Location:** St. John Paul II Parish  
**Reports to:** Pastor  
**Classification:** Hourly  
**FLSA:** Non-Exempt; Full-Time (or Part-Time, depending on needs)  
**Budget:** 00554 (the account the payroll is charged)  
**Date Created:** 08/23/2023 (updated)

**OBJECTIVE:**

To serve the St. John Paul II Parish by providing administrative support to the Pastor and Office Manager by accomplishing miscellaneous record keeping and receptionist duties at the direction of responsibilities assigned by the Pastor.

**I. RESPONSIBILITIES:**

The following responsibilities are defined but not limited to:

- Welcoming visitors to the office, assists them in making appointments, assures their comfort and directs them to the proper staff as needed.
- Answering telephones; screens calls, forwards calls and /or records and forwards messages accurately; may transcribe messages from telephone answering machine.
- Maintaining a calendar of parish events, staff schedules and appointments as needed
- Maintaining confidentiality regarding visitors seeking appointments with the pastor or parish staff
- Administrative support to parish staff (typing, proofreading, formatting, copying, filing, and file maintenance) at acceptable levels of speed and accuracy
- Word processing functions (Microsoft Word, Excel, etc.) necessary to complete the weekly parish bulletins to the bulletin publisher according to their deadlines
- Report distribution and preparation (assembling, collating, folding, labeling, mailing, etc.) as needed
- Preparing for weekend Masses (bulletins to church, missal numbers updated, announcements & prayers in Lector & Pastor books).
- Maintaining and updating automated Minister Scheduler Pro database for extraordinary Eucharistic Ministers and Lectors
- Prepare First Friday schedules for home visitation
- Providing ongoing database input and maintenance
- Providing telephone back-up for the department as supplement to the voicemail system

- Keeping track of all pledges and payments weekly for the CSA and send monthly reports to the Diocese via PDS.
- Forwarding invoices to the Office Manager for processing.
- Suppling fill-in support for occasional absences/vacation as needed
- Forwarding timesheets to the Office Manager for payroll processing by ECCA
- Collaborating with the Office Manager for sale of parish cemetery lots and keeping the map current by working with funeral directors.
- Keep card catalog current with deaths dates.
- Send notification to local registrar and Department of Vital Records of burials (forms provided by funeral director after a burial)

**II. QUALIFICATIONS:**

- **Education:** H.S. diploma or G.E.D.
- **Experience:** Previous administrative history (3-5 years) supported by positive references

**III. COMPETENCIES:**

- Excellent interpersonal skills and cooperation with co-workers
- Ability to work with minimal supervision
- Able to demonstrate proficiency with Microsoft Office Word and Excel (additional software is a plus) and learn new programs as required
- Attention to detail, timeliness and quality of work

**IV. PHYSICAL REQUIREMENTS:**

- Occasional / moving or lifting of 10-15 pounds
- Bending, reaching, low-level climbing (office stools or step-ladders)
- Ability to operate and trouble-shoot general office equipment (e.g., copier, fax, etc.)

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Incumbent

\_\_\_\_\_  
Date