



Prayer - Planning - Possibilities



Parish Restructuring Preparation Guide



DIOCESE OF ERIE • PASTORAL PLANNING PROCESS
September 2016



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Dear Brothers and Sisters in Christ,

Working on pastoral planning has been a walk in faith. While we've been following a basic outline, each time we get to a new stage of the process, we find the clarity needed.

I am deeply grateful for the feedback everyone provided after we released the *Preliminary Plan for Parish Restructuring*. In addition to the official responses from each parish, nearly 2,000 parishioners came forward to share their insights about the proposed changes.



It is clear people took the time to pray, to consider options and to craft helpful commentary. The same thing goes for the official parish responses. Some parishes held town-hall meetings, some took surveys and others organized smaller meetings with a cross section of ministry volunteers and staff members. Many people voiced their support for the development of the plan. They also offered constructive criticism and alternative solutions—some of which I was more than happy to adopt.

I was impressed when several of the parishes that asked me to consider a different plan for their future also assured me they would accept the final decision and make it work. I'm inspired by the deep desire to carry out the mission of the church evident throughout the diocese.

When we are ready to put the plan into practice beginning in February 2017, each parish will have a comprehensive implementation guide with checklists and timelines to help them through the transition. Different guides are being created for parishes that are merging, partnering or continuing to stand alone. Each guide is being designed to help parishes with the significant logistics involved. Everything from faith formation and finances to human resources and hospitality are being addressed.

These final weeks and months before the 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 next five months to prepare their people for the coming changes. That is why we are providing a companion guide with several prayer services to use in parishes.

During the coming months, I invite your parish to celebrate the many blessings you currently enjoy. Advent and the Christmas Octave give us especially rich moments for gratitude and appreciation. 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 staffs as the announced changes are implemented next year. But the more each parish can accomplish before the plan is implemented in February, 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,



The Most Rev. Lawrence T. Persico
Bishop of Erie

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Q & A

FREQUENTLY ASKED QUESTIONS about pastoral planning

The following section was developed in response to many of the comments that appeared in the individual feedback offered in response to the preliminary plan. They will be made available at www.ErieRCD.org and in the Information Bulletin as well. 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 Parish Listening Task Force and after careful consultation with the Presbyteral Council. He also listened to the feedback submitted by nearly 2,000 parishioners in the Diocese of Erie. The Parish Listening Task Force identified objective criteria before making their recommendations. They are listed at www.ErieRCD.org/planning.htm and include:



- The **geographical distances** between the parishes in each deanery were calculated by using GPS technology.



- The potential for population growth and **demographics** for each area of our diocese, as provided by Meitler based on statistics from the U.S. Census Bureau and the Pa. State Data Center.



- All the information Meitler compiled from the **parish snapshots**, created by each parish.
- An overview of the **financial stability** of each of the parishes in the 13 counties of the diocese was provided by the Diocesan Finance Office.



- Another important component was the **seating capacity** of each church and the percentage of the pews being filled on any given Sunday—information which each parish provided.

- To the best of its knowledge and experience, the Parish Listening Task Force also considered the **condition of the facilities** of each parish.
- The **projected number of active priests** played an integral part in establishing the recommendations. Although many retired priests continue to be very generous in offering their assistance, in another eight years, the diocese will have only 74 active (i.e., non-retired) priests.

These criteria guided the recommendations of the Parish Listening Task Force, and also informed the decisions approved by the Presbyteral Council, and ultimately, Bishop Persico. The Diocese of Erie is made up of ten separate deaneries, each led by a priest who has been elected to serve as dean. The insights provided by each dean during the decision-making process were invaluable.

It also is true that a certain degree of subjectivity was involved. In some cases, the presence of a retired priest willing to continue serving in his current parish meant a parish could remain open for now.

Each parish situation has many nuances and many considerations. In addition, Bishop Persico and his advisors needed to take the big picture into consideration with each decision made. The bishop said from the beginning there were no foregone conclusions. Certainly, there were some obvious likely changes. But no decisions were made about any parishes without studying the criteria and listening to the feedback, the data and the Presbyteral Council.

A number of steps in the plan have revealed that some parishes are no longer in a position to provide the pastoral care which should be available. We must be responsive to the circumstances of our times.

The bishop also 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?

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

A: This is a surprisingly small number of priests. In addition to Bishop Persico, the full-time staff at St. Mark Catholic Center currently includes the vicar general, the episcopal vicar for canonical services, the chancellor and the vicar for education.



A number of pastors also have assignments at St. Mark Center, including the judicial vicar and the priests assisting in the tribunal and the permanent diaconate program. The vicar for education works full time in administration but is also vice-rector of St. Mark Seminary. The seminary rector is also the associate vice president for mission and ministry at Gannon, and the resident spiritual director is also assigned full time at Mercyhurst Prep. Furthermore, the seminary priests are chaplains to the Carmelite monastery in Erie.

There are only three other priests working at Gannon University, the sole diocesan university in our commonwealth. Another two priests work at Mercyhurst University. Again, each of these priests has additional duties, often in a parish.

Parents across the diocese consistently ask for the presence of priests in our schools. Many people who provided feedback acknowledged this is essential for generating new vocations. The bishop is trying to balance this top priority with the great needs in parish life. More lay administrators are being hired at high schools so that priests can be 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 already assisting with Sunday Masses in parishes, universities, convents, or other institutions.

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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 to form a life-giving parish community. For now, he does not feel this is a viable option for our diocese.

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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—and often worse than—what is going on in the Catholic Church. Apart from that reality, most people recognize this is not actually an option for Bishop Persico and is not supported by the theological tradition of the Catholic Church or the ecclesiastical discipline of the Latin Rite to which the Diocese of Erie belongs.

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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 some grave reasons indicate that the church should no longer be used for worship could the bishop 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 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.

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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 Priest 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 has said he wants to create as little disruption as possible concerning assignments during the 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. Bishop Persico is expecting pastors to carry out the plan, abiding by diocesan law as established. Mission churches and/or 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.

Q: How will we handle change in the middle of a fiscal year?

A: The parish and any merged churches or missions which previously filed an annual report will continue to file separate reports for 2016-2017 (cf. page 22). Beginning with the 2017-2018 fiscal year, which starts on July 1, 2017, parishes that have merged will create a single budget report that includes all of its church/mission locations.

Q: What about the faith formation component of pastoral planning?

A: The Faith Formation task force has offered a series of recommendations to Bishop Persico. He looks forward to introducing a number of aspects of this portion of the plan in the spring of 2017. As parishes are settling into their new configurations, he believes opportunities for spiritual growth, unity and community will be essential.

PRAYER RESOURCES to help prepare the parish

The weeks and months between the announcement of restructuring decisions in September 2016 and their eventual implementation in February 2017 offer 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 Diocesan Liturgical Commission, with the Office of Worship, has created a number of prayer resources for parishes to give voice to the varied experiences of parishioners during the fall of 2016 and beyond.

Included in a companion document and available for downloading at www.ErieRCD.org/planning.asp are prayers and prayer services that can be used in a number of situations including:

- where conflict/grief/anxiety is still strong
- where a parish seeks to acknowledge and honor its past and its traditions before moving on
- where healing is necessary before looking to the future
- and where parishes are ready to give thanks and praise and become more deeply the Body of Christ.

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.

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STAGES OF GRIEF

As a reminder, the Meitler firm provided a modified version of the Elizabeth Kubler-Ross stages of grief at a series of deanery meetings in the spring of 2016. It may be helpful to parish leadership to remember that different parishioners may be experiencing different aspects of this process as parishes prepare for a new reality.

- 1 **Shock** – Initial paralysis at hearing the bad 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 other 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.

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Definitions: MERGING, PARTNERING, AND STAND-ALONE

MERGING is a **transitional step** in which one parish community is subsumed into another.

Technically, all merging will take place during the week of February 13, 2017. 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. Thus, after February 2017, the only two types of parishes which will exist in the Diocese of Erie are the **stand-alone parish** and the **partnered parish**.

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)

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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 have been supplied by Msgr. Edward Lohse, JCD, episcopal vicar for canonical services for the diocese. 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 sacred building is intended for the use of the general public, 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.

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NEW DIOCESAN LAW

The bishop has promulgated particular law (i.e., diocesan law) which will have 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 take 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.

§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).

§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.

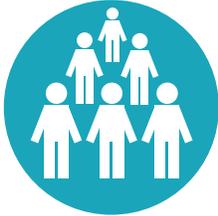
The Eucharist may be reserved in mission or other secondary churches, with the permission of the bishop, vicar general or episcopal vicar, and provided that Mass will be celebrated there at least once every two weeks (cf. c. 934 §1, 2^o). If the Eucharist is reserved, the church is to be open for some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

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Forming an **IMPLEMENTATION TEAM** to help the parish prepare

Implementing the pastoral plan is no small task. Whether you are remaining as a stand-alone parish, merging or partnering with another parish, after new pastor assignments are finalized, each pastor will be asked to create an implementation team to help carry out the process.



Pastors are encouraged to work on a list of recommendations for this team as soon as possible this fall. 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 implementation team. Being mindful and respectful of the past will help ease the parish into the future.

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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 October and November 2016, 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, 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 pastor, as well as a list of who else has keys and to which buildings or files.

FINANCIAL ASSETS/LIABILITIES INVENTORY

An updated report on the 2016-2017 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 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. **At some point in 2017, the Chancery will ask for a copy of this list, so that the Chancery can update its own records.**

In addition, any written history of a parish should be shared with a 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 move into this new era 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 each year during the annual audit.

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 new 2016 Wage and Hour Federal Regulations.** There is no need to reinvent the wheel: sample position profiles are included with this guide (see pages 22-25.) Additional samples can be found at www.ErieRCD.org/hr.htm.
- 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 new 2016 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.

Sample 1: Parish Secretary

St. John Paul II Parish

Position Profile

Title: Parish Secretary

Incumbent: Mary Doaks

Reports to: Pastor

Incumbent Signature **Date**

Approved by: _____

___ Exempt X Non-Exempt

Pastor

___ Ministerial

X Full Time ___ Part Time

Office Manager

Anniversary Date: 9-5-16

Revision Date: 9-5-16

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.)

III. **QUALIFICATIONS:**

Education:

High school education/ GED equivalent

Experience:

Five years prior experience in the maintenance especially in the electrical, plumbing, carpentry, painting and grounds keeping areas.

IV. **COMPETENCIES:**

1. Ability to work with minimal supervision in an honest and trustworthy manner
2. Basic knowledge in all areas of building upkeep.
3. Ability to use tractor for mowing grass and snow removal, to use hand lawn mower, weed whacker and pruning equipment, and to perform routine repairs
4. Physically able to perform duties as requested and as defined in Section II above and Section V below
5. Demonstrate an awareness of job safety at all times.
6. (Optional) Able to leap tall buildings in a single bound

V. **PHYSICAL CAPABILITIES:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. This includes frequent standing, walking, reaching, kneeling, crawling and climbing. Finger dexterity required to manipulate objects, tools and/or controls. The employee must occasionally lift and/or move more than 50 lbs.

MINISTRY INVENTORY

Parishes offer a variety of ministries and outreach efforts. Referring back to the Parish Snapshots that were completed as part of the planning process may be useful in considering some of the priorities that need to be addressed in this area.

In addition, it may be helpful to gather information 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?

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TIMELINE



Sept. 20, 2016	Final parish configuration announcements for Northern Vicariate
Sept. 21, 2016	Final parish configuration announcements for Western Vicariate
Sept. 22, 2016	Final parish configuration announcements for Eastern Vicariate
Sept. 23, 2016	1. Parishes begin using the Prayer Services for Parish Restructuring 2. Parishes begin working through recommendations in <i>Parish Restructuring Preparation Guides</i>
Dec. 2016-Jan. 2017	Anticipated announcement of clergy assignments
Feb. 13, 2017	Canonical changes take effect
Week of Feb. 13, 2017	Pastors move to new assignments
Feb. 18-19, 2017	Parishes celebrate first weekend liturgies in new configurations
Feb. 13-June 30, 2017	Parishes gradually finalize implementation
Spring 2017	Faith Formation Task Force initiatives unveiled
July 1, 2017	All parishes will file a single budget report which will include all of its church/mission locations (refer to page 9)
2017-2018	Diocesan organizational structure changes redesigned to meet the needs of the pastoral plan.

What to expect in the

IMPLEMENTATION GUIDE



For those who are interested in the guides that are being developed for use after the pastoral plan is implemented in February 2017, here are some of the areas that will be addressed:

- Disposition of church records, including sacramental records and administrative records such as deeds, parish council minutes and financial records for parishes that are merging
- Guidance for handling human resource issues
- Ideas for keeping parishioners informed
- Transitioning finances
- Patrimony of the parishes
- Use of buildings
- Combining outreach and ministry efforts
- Ongoing prayer opportunities