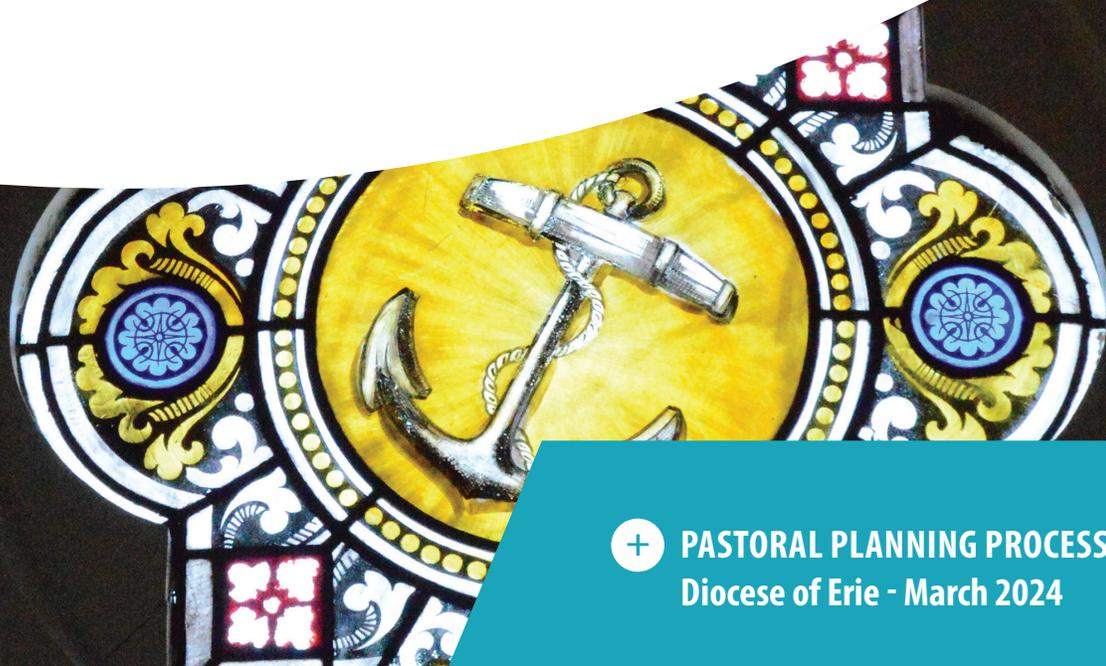




Prayer - Planning - Possibilities

Implementation Guide for Parishes not Restructuring at this Time



PASTORAL PLANNING PROCESS
Diocese of Erie - March 2024





Dear Brothers and Sisters in Christ,

Thank you for taking the time to review this implementation guide.

Creating and finalizing a new configuration for parishes involves a significant process. But as the planning process transitions into implementation, a completely new journey begins. Whether your parish is part of a new partnership, a merger, or perhaps welcoming new parishioners who join your parish due to changes at their own, these guides are designed to help you consider the many aspects of the experience that need to be taken into consideration.

These moments are very important for both parishioners and parishes. While there are many logistics to address, we must begin by ensuring that all parishioners, old and new, feel a sense of welcome and belonging. Pastors, pastoral teams and parishioners should all be involved in the process, sharing insights and ideas about ways to make transitions not only manageable, but also life-giving.



Generosity and patience as well as honest, charitable discussions will help us to live out the Pastoral Planning Prayer created for the Diocese of Erie:

“...for the vision to see new paths of possibility; for a spirit of mission that invigorates our every effort; and for the strength to be unafraid of what is new.”

Sincerely yours in Christ,

The Most Rev. Lawrence T. Persico
Bishop of Erie

+ REVIEWING PARISH LIFE



Rather than asking each pastor to create a specific team to help carry out numerous aspects of reviewing parish life, this naturally 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-downloads.html, 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 methods might be used to keep parishioners apprised of new initiatives and changes?

Ministries: What is the best way for the parish to analyze its current offerings and to brainstorm ways in which its 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?

QUESTIONS FOR REFLECTION

What follows is a list of possible questions for consideration by parishes that are not restructuring at this time. While it is not practical to address all of the questions at once, prioritizing them might be a good way to start. In addition, your parish might come up with other considerations.

- How might we renew ourselves, using the Key Indicators for a Vibrant Parish?
A summary is available at the end of this guide. The full list can be found at www.ErieRCD.org/planning-downloads.html.
- As a result of the listening sessions for the Synod on Synodality, our diocese identified four areas of concern: Welcoming and Inclusivity, Mission and Outreach, Communication, and Leadership. How is our parish addressing these priorities? (The diocesan reports and more information on the synod can be found at www.ErieRCD.org/synod.html.)
- 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 evangelize as a parish? How can we be more inviting and mission oriented? How are we reaching out to those who used to be members in our parish? To those who come to us for sacraments but do not regularly participate in Mass? To neighbors who might be receptive to an invitation?
- How have we done in implementing the new Faith Formation process in our parish?
- 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?
- 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?
- In 2016, the Diocese of Erie had 116 active priests and 38 retired. In 2023 there were 92 active and 34 retired priests. What can we do to help increase vocations to the priesthood?
- How can we encourage vocations to religious life, holy matrimony and the permanent diaconate?
- 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?

+ 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/finance/financemanual.html, includes a chapter with the diocesan norms that all parishes should review, whether they are updating membership in their Finance Council 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.

Take this opportunity to review the policies found in *The Parish Financial Practices Policy Manual* available at www.ErieRCD.org/finance/financemanual.html.



Questions can be addressed to:
Patrick Barron, Director of Parish & School Financial Services,
at pbarron@ErieRCD.org or by calling 1.800.374.3723, ext. 185 or 814.824.1168.

FINANCIAL REPORTING/DIOCESAN OBLIGATIONS

Each parish will continue to file its own parish Annual Report and Budget. Each parish will also continue to have 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.

+ 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.

+ RECORD-KEEPING

CHILD PROTECTION RECORDS

Please ensure that all records regarding child protection compliance are in place for your parish, stored in a secure, locked file. All records must be kept from every site, including old records from secondary or former churches that no longer have any programs. All Safe Environment Training for Youth records must be kept on file indefinitely.



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 and IIIB. Documentation to be kept on file includes applications, clearances, trainings, compliance forms, etc. Complete lists of required records can be found in Section III. A. of the policy.

Questions can be addressed to:

Cindy Zemcik, Coordinator of the Office for the Protection of Children and Youth, at czemcik@ErieRCD.org or by calling 1.800.374.3723, ext.195, or 814.824.1195.

SACRAMENTAL RECORDS

All sacramental records should be archived appropriately. Please remember that all official sacramental records must be kept in written form in the official sacramental books. Sacramental records may also be kept electronically, but only as a backup to the hard-copy version.



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/finance/financemanual.html 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.

Your Pastoral Council 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. Jim Tometsko, director of Human Resources, can assist with your questions and refer you to resources that will be helpful as you navigate changes. He can be reached by email at jtometsko@ErieRCD.org or by phone at 814.824.1189.

POSITION PROFILES

As per the *Parish Restructuring Preparation Guide* (www.ErieRCD.org/images/pdf/March2024-parish-restr-prep-guide.pdf), pastors should verify that the following are updated and readily available:

- A position profile for each full-time and part-time paid staff member of your parish in accordance with federal requirements through the Department of Labor. More information, along with sample job profiles, is available at www.ErieRCD.org/Human-Resources.html.
- A list of the volunteers and their duties at the parish.
- A list of the ministers and their roles at the parish (e.g. liturgical ministers, faith formation catechists, etc.).

Remember that all employee 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/Human-Resources.html.

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/Human-Resources.html under the heading *Developing a Parish Employee Handbook*.



+ 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 4:00 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. Pastors who discern a need for multiple anticipated Masses must request an indult from the 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.

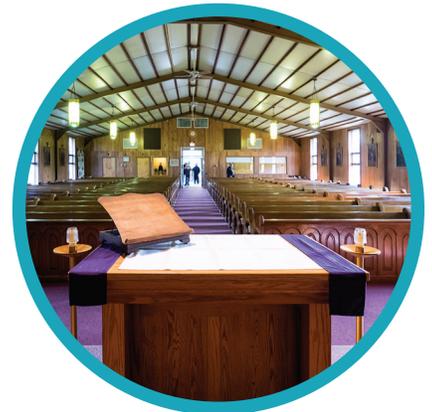
MASS INTENTIONS AND OTHER LITURGICAL REQUIREMENTS

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 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 Priest 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.

Excess Mass intentions may also be sent to the Chancery for distribution to retired priests and those without a regular parish assignment. 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 within a year.

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).

(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.



CONTACT 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	REV. CHRISTOPHER SINGER Chancellor CSinger@ErieRCD.org 814.824.1130
Communications Office	ANNE-MARIE WELSH Director AMWelsh@ErieRCD.org 814.824.1167
Finance Office	PAT BARRON Director of Parish and School Financial Services PBarron@ErieRCD.org 814.824.1168
Human Resources	JAMES TOMETSKO Director JTometsko@ErieRCD.org 814.824.1189
Vicar General	VERY REV. NICHOLAS ROUCH Vicar General NRouch@ErieRCD.org 814.824.1144

KEY INDICATORS FOR A VIBRANT PARISH

VISION AND LEADERSHIP

1. The parish follows and promotes the Gospel of Jesus Christ and understands its relationship to the diocese and universal church.
2. The parish develops a local vision for pastoral activity in the coming years which is rooted in the Gospel of Jesus Christ.
3. The parish is staffed by properly trained ministers or shares staff with other parishes to lead and direct all areas of the parish's mission.
4. The parish has a finance council and a pastoral council in place, which meet regularly to engage and involve the faithful to help carry out the pastoral activity of the parish.

WORSHIP AND THE SACRAMENTS

5. Liturgical celebrations are properly and thoughtfully prepared and well attended with full, active and conscious participation.
6. Homilies are relevant, challenging and faithful to the Gospel and church teaching. Parishioners are taught how to grow, and are inspired to live as disciples of Jesus Christ.
7. Sacramental preparation is thoughtfully and properly planned and conducted in accord with approved guidelines and diocesan policies.
8. The prayer and devotional life of parishioners is supported and nourished beyond the Sunday liturgy and the sacraments.
9. Music as a part of worship is of high quality.
10. The OCIA is implemented and its rituals are celebrated at the proper times.

LIFELONG FAITH FORMATION, CATHOLIC EDUCATION AND EVANGELIZATION

11. The parish provides adult faith formation opportunities which include both study and spiritual formation in accord with diocesan policies.
12. The parish provides comprehensive faith formation for children in religious education programs in accord with diocesan policy.
13. The parish provides opportunities for learning, spiritual growth, participation in the sacramental life, service and community for its adolescents.
14. The opportunity to attend a Catholic school is provided to parishioners including some financial support from the parish.
15. The parish is creating a culture of vocations that actively and prayerfully promotes vocations to the priesthood, diaconate and consecrated life.
16. Parishioners are challenged to reach out to inactive Catholics, inquirers, the unchurched and others.

SERVICE AND PASTORAL CARE

17. The parish is actively engaged in proclaiming the Gospel through service to people in need locally, in the wider community and the world.
18. The parish provides ministry to the homebound and elderly parishioners and to those in hospitals, nursing homes and other care facilities.

STEWARDSHIP/BUILDING COMMUNITY

- 19.** The parish welcomes new parishioners and invites them to become involved in the parish mission.
- 20.** Parishioners are invited and provided opportunities to better understand their gifts and talents and ways these can be used to minister to others.
- 21.** Parishioners understand stewardship as a response to their discipleship and give of time, talent, and treasure to support the Church's mission.
- 22.** The parish fosters opportunities for fellowship providing a sense of community for parishioners.

ADMINISTRATIVE SERVICES

- 23.** The parish operates with a balanced budget and has sufficient operating funds for ministries, programs, facilities and staff in order to meet the needs of the community.
- 24.** The parish has all necessary financial controls and operating procedures in place in accordance with diocesan policies.
- 25.** Financial reporting is done in a timely manner and follows the accounting standards established by the diocese.
- 26.** Parish facilities are well-maintained, attractive, and appropriate for parish ministries and programs. Facilities are handicap-accessible and inviting.

Exempt/Non-Exempt Worksheet

(to be completed by all not-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:
Salary Test: Annualized wages: _____ Gross weekly wages: _____	If employee's annualized wages total less than \$35,568 per year or \$684 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 \$35,568 per year or \$684 per week, continue with the duties test.
Note regarding Blue Collar Workers	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.
Duties Test: If an employee meets the stated criteria in any one of these areas listed below, that person is exempt from receiving overtime pay.	
Executive Exemption Meets: _____ Does not Meet: _____	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.
Administrative Exemption Meets: _____ Does Not Meet: _____	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>Professional Exemption</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>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’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>Outside Sales Exemption</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>