

CLERGY PERSONNEL MANUAL
ARCHDIOCESE OF PORTLAND

PREFACE TO THE 2014 EDITION OF THE CLERGY PERSONNEL MANUAL

On December 8, 1979 Archbishop Cornelius Power promulgated the *Clergy Personnel Manual*. This Manual was the product of extensive study and consultation by the Clergy Personnel Board and finally a vote of the entire presbyterate.

Since the original promulgation of the Manual, some chapters have been revised. This edition prints all the chapters in a uniform format.

The organization and position titles within the Pastoral Center have changed. This edition references positions of offices that coincide with our current Pastoral Center organization. This 2014 edition of the *Clergy Personnel Manual* reflects our current personnel policies and structure.

Members of the Clergy Personnel Board: Rev. Todd Molinari, Most Rev. Alexander K. Sample, Most Rev. Peter Smith, Rev. Jeff Eirvin, Rev. James Coleman, Rev. Ronald Millican, Rev. Richard Thompson, Rev. Michael Vuky, Rev. Angelo Te.

Vicar for Clergy: Rev. Todd Molinari

Archbishop of the Archdiocese of Portland: Most Rev. Alexander K. Sample

PREFACE TO THE 1995 EDITION OF THE CLERGY PERSONNEL MANUAL

On December 8, 1979, Archbishop Power promulgated the *Clergy Personnel Manual*. This Manual was the product of extensive study and consultation by the Clergy Personnel Board and finally a vote of the entire presbyterate.

Since the original promulgation of the *Clergy Personnel Manual*, some chapters, like the one on area vicars, have been added; others, like the one on pastors, have been revised. This edition prints all the chapters in a uniform format and notes the date each chapter was promulgated or revised.

The intern program for transitional deacons and newly ordained priests was dropped several years ago because of changes in the Formation Program and the needs of the parishes of the Archdiocese. The Vicariate San Salvador has also been eliminated to respond to the increasing number of Hispanics in Western Oregon and their presence in every area vicariate and in most of our parishes. This edition of the Personnel Manual drops the chapters on interns and the Vicariate San Salvador and the references made to them in other chapters, substituting where appropriate the present structures, e.g., Vicar for Hispanic Ministry and the Office for Hispanic Ministry.

The organization and position titles within the Pastoral Center have also changed. For example, when this Manual was written the Office of Clergy and the Clergy Personnel Director were under the Vicar for Worship and Ministry. Now the Office of Clergy is under the Vicar for Clergy. This edition changes references to positions of offices to make them coincide with our current Pastoral Center organization.

Finally, there have been some official policy changes that were not incorporated into the Personnel Manual. When the Presbyteral Council constitution was revised, the method of electing Personnel Board members was changed but the Personnel Manual was never revised to reflect this policy change. The revision of the policy for clergy remuneration and retirement was incorporated into a revised chapter on remuneration and retirement. Other chapters, however, which referred to remuneration or retirement were not revised to be in accord with the new policy. This edition makes those revisions.

In publishing this 1995 edition, it is not the intent of the Personnel Board to modify an existing policy or introduce any new policy, but rather to make the Personnel Manual describe our current personnel policies and structure. The Personnel Board hopes that this edition of the Manual will be a more accurate and useful reference for the clergy.

Members of the Clergy Personnel Board: Father Paul Peri, Father John Kerns, Father Bob Krueger, Father Bert Griffin and Father Jack Mosbrucker.

Vicar for Clergy: Father Charles Lienert.

Archdiocesan Administrator: Bishop Kenneth Steiner

PREFACE TO THE 1979 EDITION OF THE CLERGY PERSONNEL MANUAL

“There is a call for:

- a) a definition of ministries approved and functioning within the Archdiocese.
Options for new ministries.
- b) a living statement on life style and living conditions of the clergy, e.g., rectory living, living apart from the rectory, living in community.
- c) review and evaluation of ministry
- d) a process for assignment
- e) a process for resignation
- f) a process for retirement
- g) a clergy handbook which would include, among other items, Archdiocesan policy on health insurance, life insurance, sabbaticals, continuing education, vacations, professional counseling services, etc.
- h) a policy on incardination and its effect on pastoral assignment.”

Memorandum of J. E. Perri, S.J., to Senta of Priests, Archdiocese of Portland on “Issues emerging from an analysis of the response made in the “Personnel Policy Questionnaire” of May 4, 1978”, dated August 8, 1978.

“Bishop Steiner, Bishop Waldschmidt and I propose...that the Personnel Board devote its principal efforts to a study of the personnel policy presently in force in the Archdiocese to see in what ways it might be modified and improved, and to develop guidelines and procedures for an appointment process which will involve the elements of reliable and up-to-date information, use of job description and parish profiles, personnel contact with the priest(s) involved, and strict confidentiality.”

Memorandum from Archbishop Power to all priests of the Archdiocese of “Proposed Changes In Personnel Policy and Procedures”, dated April 10, 1979

In a spirit of service, the Personnel Board presents this *Manual of Clergy Personnel Policies and Procedures*. Our work began in March of 1979 and was conducted in four phases:

- 1) A first working draft. We studied and compiled existing policies and procedures of the Archdiocese and compared them with policies and procedures used by personnel boards throughout the United States. We also reviewed existing canon law and proposals for change in the light of Vatican II. It was not the mandate of the Personnel Board to invent

entirely new policies of to jettison existing ones. Various personnel policies have already been discussed and recommended by the Priests' Senate and implemented by the Archbishop. Based on our own studies and recommendation for modification and improvement, we finally prepared a working draft.

- 2) Revision of the working draft. We consulted the Senate Task Force on Personnel, the Salary and Retirement Committee, the Continuing Education Committee, the Priestly Life and Ministry Committee, the Archbishop and the Auxiliary Bishops for their recommendations, amendments and improvements. This process was completed in August of 1979.
- 3) A first proposal. A proposal, as amended by the above consultation, was mailed to the clergy and presented to the five age-groups in meetings in September. Written amendments were solicited from the age-group members.
- 4) A second proposal. An amended draft of this *Manual of Personnel Policies and Procedures* for the Archdiocese of Portland was presented to the presbyterate in October 1979 for their amendments and ratification, and to the Archbishop for his approval and promulgation.

After some final refinement, the Archbishop promulgated this Manual on the Feast of Immaculate Conception, December 8, 1979.

The Personnel Board owes a debt of gratitude, not only to the many committees that worked with us, but to the clergy of the Archdiocese for your support and assistance and to the Archbishop and Auxiliary Bishops for your encouragement and active participation in this project.

Thank you.

Note: The members of the Board who drafted the 1979 *Personnel Manual* were Father Bertram Griffin, Father Charles Lienert, Father Donald Denman, Father Arthur Dernback and Father Michael Sprauer.
Bishop Kenneth D., Steiner was the Personnel Director.
Archbishop Cornelius M. Power promulgated the Manual on December 8, 1979.

CLERGY PERSONNEL MANUAL

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CHAPTER I GENERAL STATEMENT OF POLICY

- I. "A diocese is that portion of God's people which is entrusted to a bishop to be shepherded by him with the cooperation of the presbytery. Adhering thus to its pastor and gathered together by him in the Holy Spirit through the Gospel and the Eucharist, this portion constitutes a particular church in which the one, holy, catholic and apostolic church of Christ is truly present and operative." (Decree on the Bishop's Pastoral Office, #11.)

- II. The primary goal of personnel policy is to provide the best possible service to the People of God. The fundamental requirement to accomplish this end is to have holy ministers. In addition to this requirement, there are many methods of assisting, supporting and enabling these ministers as they go about their tasks in the service of the Church. The value and necessity of continuing education for clergy has been proposed in many ecclesiastical documents. The necessity of a system of accountability has likewise been emphasized. The bishops of the United States have encouraged the spiritual, professional and personal growth of those who minister to the Church. But for many reasons, such as scarcity and distribution of clergy, rapid development of the Archdiocese, and the policy of consultation with the clergy, there have arisen difficulties in the assignment of clergy. This Manual of Clergy Personnel Policies and Procedures is designed to help the Archbishop in the process of assignment of clergy. It attempts to respond to some of the needs of the clergy to develop themselves within the Church. But always the fundamental reason for this policy is the best possible ministry to the People of God in this Archdiocese.

- III. A procedure for assigning clergy seeks to wed the talents, strengths and disposition of a particular priest or deacon to the needs of the people served by a particular assignment. It is a service to the people as well as to the growth and development of priests and deacons. Along with the responsibility of assigning clergy goes the need of being informed:
 - about the individual parishes and apostolate, so as to be able to select clergy who will respond to the needs of the People of God in the best possible way;
 - about the desires, talents, skills and needs of the clergy so as to be able to take into account their personal and professional growth. It seems that both of the above elements are essential to the primary goal of this Manual. This procedure will also require the full cooperation of all persons involved.

- IV. The policies and procedures contained in this Manual are presented as a response to the personnel needs of the Archdiocese. It is hoped that they will be a means of attaining the goal of the best possible service to the People of God.

CHAPTER II
THE PRIEST PERSONNEL BOARD

I. MEMBERSHIP

- A. Membership on the Priest Personnel Board shall be limited to priests incardinated in the Archdiocese of Portland. Membership shall be chosen from the five age-groups. Each age-group shall elect one of its members to serve on the Priest Personnel Board. In addition the Vicar for Clergy and Vicar General shall serve as ex-officio members without vote. The Archbishop may always exercise his right to attend Priest Personnel Board meetings. The Archbishop, the Vicar for Clergy or the Priest Personnel Board may request individuals (e.g., Director of Vocations) to attend Board meetings if helpful.
- B. Members shall serve a term of three years and may be re-elected.
- C. Elections shall be conducted each year at the annual Priests' Convocation.
 - 1. The Vicar for Clergy shall draw up an up-to-date list of all incardinated priests within the Archdiocese, not including those who are retired, and shall divide the priests into five equal groups on the basis of seniority.
 - 2. The elections shall be conducted by each age group at the annual Priests' Convocation in accordance with the Presbyteral Council Constitution and by-laws.
- D. The Vicar for Clergy shall normally plan the agenda and preside at all meetings. The Vicar for Clergy will appoint committees, and officially represent the Priest Personnel Board. The Priest Personnel Board shall elect from its membership a Chair to carry out these responsibilities in the Vicar for Clergy's absence; and a Secretary to keep minutes and mail them to members of the Board. The office of Chair and Secretary may be held by the same member. The Office of Clergy may provide secretarial services for keeping minutes as well as for preparing and mailing agendas, etc. Officers shall serve for one year and may be re-elected.

II. MANDATE

- A. The Priest Personnel Board shall study the personnel policy in force in the Archdiocese to see in what ways it might be modified and improved, and to develop and monitor guidelines and procedures for an appointment process which will involve the elements of reliable and up-to-date information, such as parish profiles.

- B. Using forms already available and any others readily obtainable, the Priest Personnel Board shall prepare forms, questionnaires or models for distribution to the priests of the Archdiocese, for the purpose of obtaining personal and parish profiles, and, to whatever extent necessary or desirable, job descriptions of special clerical positions within the Archdiocese. In the preparation of these forms, questionnaires or models, the Board shall consult any committee or individual it chooses, including the Vicar for Clergy, and present the forms it wishes to recommend for use in the Archdiocese to the Archbishop for approval and implementation.
- C. The Priest Personnel Board shall advise and assist the Vicar for Clergy in his work of recommending assignments of priests to the Archbishop. The Priest Personnel Board shall provide consultation in accordance with the personnel policies and procedures in this Manual. The Priest Personnel Board shall be available for additional consultation deemed advisable or necessary by the Vicar for Clergy.
- D. The Priest Personnel Board shall recognize that the canonical appointment of priests and deacons of the Archdiocese is vested in the Archbishop and shall continue to promote a direct and personal relationship between the Archbishop and his clergy. The Priest Personnel Board shall seek at all times to respect the rights of individuals to strict confidentiality in personnel matters. In offering consultation and advice, the Board must consider the needs of the People of God in a particular area, the recommendations of the parish, as well as the talents, needs and preferences of the particular priest. In the assignment of newly-ordained priests, concern for their professional growth in the ministry must be given a high priority. The Priest Personnel Board can carry out its mandate only if it has the support of the Archbishop along with his strong recommendation that all priests work with the Vicar for Clergy and the Priest Personnel Board. For its part, the Priest Personnel Board must be aware of its delicate and grave responsibility to the Archbishop, the clergy and people of the Archdiocese.
- E. The Priest Personnel Board will plan for the staffing of parishes in the future. This normally is done at the annual planning day.
- F. From a study of the long and short range goals of the Archdiocese, the Priest Personnel Board shall identify future personnel needs and recommend persons for training in these areas.
- G. Finally, the Priest Personnel Board shall be available to the clergy of the Archdiocese to discuss personnel matters.

CHAPTER III
THE VICAR FOR CLERGY

I. OFFICE OF THE VICAR FOR CLERGY

- A. The Vicar for Clergy, in consultation with the Priest Personnel Board is responsible for developing a comprehensive personnel program which will best utilize the talents, skills and interests of Archdiocesan priests in their ministry of service to the religious needs of all the people in the Archdiocese. The Vicar for Clergy is accountable to the Archbishop.
- B. The Archbishop working in collaboration with the Priest Personnel Board shall recruit and assign a competent priest, professionally qualified by formal education and experience, as the Vicar for Clergy for the Archdiocese of Portland
- C. The Vicar for Clergy shall have a term of office determined by the Archbishop.
- D. The Vicar for Clergy shall work closely with, the Vocation Director and the Director of the Permanent Diaconate. The Vicar for Clergy shall coordinate the work of these three offices

II. SELECTION OF THE VICAR FOR CLERGY

When the office of Vicar for Clergy is vacant, the Archbishop, after consultation with the Priest Personnel Board, shall appoint a qualified priest to the position.

III. CHARGE TO THE VICAR FOR CLERGY

In addition to other duties described in this Manual:

- A. The Vicar for Clergy shall collect and collate data pertinent to his office under the supervision of the Archbishop and the direction of the Priest Personnel Board. The Vicar for Clergy shall maintain up-to-date data on the talents, specialized education, expertise, experience, desires and needs of the priests of the Archdiocese. He shall familiarize himself with the variety of ministries available to priests of the Archdiocese, developing adequate profiles of parishes and apostolates. He shall work out adequate job descriptions for the various assignments in the Archdiocese. He shall maintain and up-date clergy personnel files, parish profiles and job descriptions. He shall assist the Priest Personnel Board in developing appropriate forms, questionnaires, models, etc.
- B. The Vicar for Clergy shall develop a system of communication, in accordance with these Policies and Procedures, by which the clergy of the Archdiocese can be

kept informed of: (1) personnel needs and vacancies; (2) the desirable qualifications and requirements for meeting such needs and vacancies; and (3) the procedure to be followed by the clergy who wish to apply for a specific assignment.

- C. The Vicar for Clergy shall consult with the Priest Personnel Board in matters pertaining to the assignment of priests of the Archdiocese and shall make appropriate recommendations to the Archbishop. The Vicar for Clergy shall base his recommendations on the priorities established for the Archdiocese and in accordance with the policies and criteria in this Manual, striving to match the most qualified person with the specific assignment.
1. Prior to making his recommendations, the Vicar for Clergy shall consult with the principals involved, and shall in a discreet and careful manner seek the advice of others whom the Vicar for Clergy judges would have a valuable contribution to make, so as to ascertain the effect of a change of personnel at that particular time, and to assist the Priest Personnel Board to identify the qualifications needed for a replacement or assignment.
 2. In accordance with these policies and procedures the Vicar for Clergy shall also consult with parish pastoral council members - or with a representative group - on the qualifications needed for a given position, for a replacement or for additional personnel. Any other member of the parish or parish staff may also approach the Vicar for Clergy in this matter.
 3. In accordance with these policies and procedures, the Vicar for Clergy shall inform the clergy of the Archdiocese regarding the job description and necessary qualifications for any assignment under consideration.
 4. At the conclusion of a priest's first and second terms of office, the Vicar for Clergy shall receive from each of the priests in an archdiocesan assignment an update of his education and training, a progress report on his professional goals and projects, and a statement of preference regarding his continuing in his present assignment, desirability of a new assignment, possible program for continuing education, approaching retirement, etc. In preparing this statement of preference, the priests, when appropriate, shall consult with their staff and the people they serve.
 5. The Vicar for Clergy may delegate any part of this process to members of the Priest Personnel Board, and may make provisions for whatever other consultation he may deem advisable or necessary.
 6. Finally, the Vicar for Clergy shall provide adequate information to the

Priest Personnel Board regarding parish profiles, job descriptions, personal profiles and qualifications of applicants or other personnel considered for a specific assignment and shall seek the advice and consultation of the Priest Personnel Board before making recommendation to the Archbishop. The results of this consultation with the Priest Personnel Board shall be presented to the Archbishop together with the Vicar for Clergy's recommendation.

- D. The Vicar for Clergy shall moreover consult with a broad range of persons:
 - 1. The Vocation Director, particularly in the assignment of newly ordained priests or transitional deacons;
 - 2. The Director of the Permanent Diaconate and other Pastoral Center professional staff when helpful or desirable.
 - 3. The Area vicars regarding the priests assigned in their vicariates to learn whether there are any special needs or problems which could be met or corrected by a change of assignment.
- E. The Vicar for Clergy shall, with the assistance of the Priest Personnel Board, conduct interviews as needed with priests receiving a new assignment, priests who have concluded their first and second terms, and priests who wish a change of assignment.
- F. The Vicar for Clergy shall assist in the process of preparing priests for incardination in accordance with the policies of the Manual.
- G. The Vicar for Clergy shall serve as an ex-officio non-voting member of the Priest Personnel Board, for which he shall also serve as Executive Secretary.
- H. The Vicar for Clergy shall be the head of the Office of the Vicar for Clergy and Ministry Personnel and shall perform any other Pastoral Center responsibilities as assigned by the Archbishop.
- I. The Vicar for Clergy shall participate in local and national organizations and conferences that relate to the work of clergy personnel.

IV. CRITERIA OF PERFORMANCE

The Vicar for Clergy shall be accountable to the Archbishop (in whom the prime responsibility for personnel management resides) to carry out the policies and decisions

of the Priest Personnel Board with whom he acts most proximately. The primary criteria of performance should be:

- A. the appropriateness, quality, and adequacy of the information furnished to the Archbishop and the Priest Personnel Board for the maintenance of an effective and motivated presbyterate;
- B. alertness in observing significant factors in current personnel procedures and programs which, if left unchanged, could create serious problems in the future;
- C. effectiveness in assisting archdiocesan officials, pastors and priests to develop and utilize their talents to the fullest;
- D. awareness of current concepts and techniques in the areas of diocesan planning, policies and procedures in other dioceses, personnel administration and behavioral sciences;
- E. soundness of advice and counsel furnished to individual priests;
- F. ability to establish and maintain rapport with the clergy of the Archdiocese.

CHAPTER IV PASTORS

I. THE OFFICE OF PASTOR

- A. A parish is a certain community of Christ's faithful stably established in a particular Church, whose pastoral care, under the authority of the diocesan Bishop, is entrusted to a parish priest as its proper pastor. The pastoral care of a parish or of a number of parishes together, can be entrusted to one or several priests jointly.
- B. Normally, a parish is territorial, composed of all the Christian faithful within a certain neighborhood or community. Where, however, it is warranted, at the discretion of the diocesan Bishop, after consulting with the Presbyteral Council, personal parishes may be erected.
- C. The pastor exercises pastoral care of the parish entrusted to him under the authority of the diocesan Bishop. He thus shares in the ministry of Christ and his Bishop, teaching, sanctifying and governing the parish in cooperation with other priests or deacons, with the assistance of laity, conferring with the members of the parish in accord with the norm of law and these Archdiocesan policies.
- D. The pastor is to be a priest of sound doctrine and proven morals; he is to be endowed with a zeal for souls, a missionary spirit and other virtues, and he is to possess those human qualities which are required by general law and the following norms.
- E. The pastor is responsible for providing that the word of God is proclaimed to those living in his parish. He is to see to it that the Christian faithful are correctly taught in the truths of the faith, especially through homilies on Sundays and feasts, and through catechetical instruction. He sponsors programs by which they are imbued with a gospel spirit in all their actions. And moreover, in cooperation with the Christian faithful, he brings the gospel message to the alienated, the dispossessed and the unchurched.
- F. To carry out his duties of sanctifying, the pastor should make sure that the Eucharistic Celebration is the center of the parochial assembly of the faithful. He should strive so that the Christian faithful, to whom he must administer the sacraments, are nourished by the correct and devout reception of the sacraments and that they frequently approach the sacraments of the Eucharist and Reconciliation. He should see to it that the faithful have an informed and active part in the Sacred Liturgy.
- G. The following functions, besides others in general law, are especially entrusted to the pastor and can only be fulfilled by others with his consent or presumed approval:

1. solemn administration of Baptism;
 2. administration of the sacrament of Confirmation to those who are in danger of death and Confirmation of catechumens in accordance with general law;
 3. the administration of the Anointing of the Sick and Viaticum;
 4. assistance at marriages;
 5. the celebration of funeral services;
 6. the parochial celebration of the Eucharist with a homily on Sundays and holy days of obligation.
- H. The pastor is obliged to exercise the care of souls for all committed to his pastoral care, including the members of his congregation, local community or personal mission and all those in his neighborhood or within the boundaries of his parish.
- I. The pastor is responsible for parish registers, namely, for catechumens, baptisms, confirmations, marriages, funerals, and membership. The records are to be kept in accordance with the general norms and copies are to be sent annually to the Pastoral Center in accordance with Archdiocesan policy.
- J. In all legal affairs, the pastor acts in the name of the parish according to the norm of law and Archdiocesan policy; he shall manage the facilities and financial resources of the parish in accordance with Archdiocesan policy. Pastors are reminded that they are not authorized to act as agents for the Corporation of the Archdiocese of Portland.
- K. Finally, the pastor shall exercise his pastoral care in accordance with the goals and priorities of the Archdiocese as contained in Archdiocesan policies and guidelines.

II. GENERAL NORMS FOR APPOINTMENT TO THE OFFICE OF PASTOR

- A. The office of pastor shall be considered vacant and therefore available to eligible priests upon the transfer, retirement, resignation, removal or death of the pastor.
- B. The Archbishop freely names the pastor, observing the pastoral needs of the parish and the qualifications of the candidate. He shall make appointments after consultation, weighing all the circumstances, and without any favoritism. (c. 524)
- C. When a priest is to be appointed to the office of pastor, the Archbishop shall consult with the Priest Personnel Board, the Vicar for Clergy, and other appropriate persons to determine his readiness and fitness for the office.
- D. Newly appointed pastors shall participate in workshops under the direction of the Continuing Education Board in consultation with the Priest Personnel Board in the following areas:

1. Goal setting and planning;
2. Staff management and supervision;
3. Financial and plant management;
4. Archdiocesan goals and objectives;
5. Specific courses when required in:
 - Catholic school philosophy, support and supervision;
 - Supervision and Pastor-Parochial Vicar relations;
 - Multi-cultural ministry

III. QUALIFICATIONS FOR APPOINTMENT TO THE OFFICE OF PASTOR

Individual pastors and members of team pastorates shall be evaluated on the basis of these qualifications:

- A. **Spiritual qualities.** A qualified pastor communicates his faith to others in the performance of his ministry. His spiritual leadership demonstrates and utilizes belief and prayer as motivating and sustaining influences. While pastoring his people, he promotes spiritual growth through ministry to his people. He deepens his personal commitment to Christ through reflection, reading, study and prayer.
- B. **Continuing education and formation.** A qualified pastor pursues his personal, spiritual and professional growth by participation in continuing education programs and/or private study.
- C. **Liturgical abilities.** A qualified pastor plans and carries out effective liturgical celebrations of the Eucharist, Reconciliation and other sacraments in accordance with liturgical norms of the Universal Church under the direction of the diocesan bishop. He prepares and delivers homilies on Sacred Scripture. He assumes a leadership role in forming the prayer life of a community.
- D. **Catechetical abilities.** A qualified pastor shows skill and demonstrates interest in providing opportunities for religious education for all age levels in the parish. He provides competent leaders and teachers for Faith Formation at all levels. He has experience with catechumenate programs and sacramental preparation programs.
- E. **Pastoral abilities.** A qualified pastor cares for people in response to their needs, especially for the sick, the poor, the distressed, the disadvantaged, the alienated, the unchurched and community at large. In cooperation with the parish pastoral council and its commissions, he encourages lay cooperation in ministries associated with liturgy, education, parish life and community outreach while demonstrating an ability to unify the community.
- F. **Leadership and administrative skills.** A qualified pastor organizes the parish in two major areas: effective personnel management of staff as well as volunteers, and the acquisition, retention, administration and alienation of the temporal goods of the parish. First he promotes teamwork and coordinated staff effort through

regular staff/volunteer meetings, by observing state and federal fair labor practices, and by following established Archdiocesan personnel procedures in consultation with the Archdiocesan Human Resources office. Secondly, he administers the temporal goods of the parish in two areas: 1) financial operations including fiscal operating budgets, fund-raising for the parish as well as the Archdiocese, insurance and risk assessment, and long-term strategic financial planning; 2) facilities including upkeep and maintenance, and the development of a parish master plan especially when contemplating expansion into new buildings. Finally, he fulfills these administrative responsibilities by collaborating with the parish administrative/finance council*, parish staff and volunteers.

* Parishes use these terms interchangeably.

- G. **Archdiocesan, Vicariate and ecumenical support.** A qualified pastor supports Archdiocesan goals and programs. He participates in research and consultation processes by which the Archdiocese studies problems and arrives at recommendations for actions. In cooperation with the Area Vicar, he collaborates with priests in neighboring parishes and with the clergy of other denominations for the promotion and development of religious and ethical values. He seeks help and advice from local and diocesan persons to achieve the goals and objectives of the parish.
- H. **Experience and seniority.** Seniority of service in the Archdiocese will be computed from the date of ordination to priesthood. Seniority may become a factor when two men are equally qualified for a position. Where a parish is open and priests who are already pastors are being considered, the extent of pastoral experience may be a determining factor.

IV. SPECIAL QUALIFICATIONS FOR APPOINTMENT TO THE OFFICE OF PASTOR

- A. Where there is a parochial or area school, the specially qualified pastor shows a strong commitment to supporting the philosophy of Catholic education, to allocating and raising resources for the school, and a willingness to work with the parochial school advisory council and the Archdiocesan Department of Catholic Schools.
- B. Where there is a parochial vicar, the specially qualified pastor collaborates with the parochial vicar as a coworker in priestly ministry. He guides, advises and evaluates the ministerial performance of the parochial vicar and assists him in developing his priestly potential and improving his ministerial performance.
- C. Where there are significant numbers of inter-cultural Catholics, the specially qualified pastor demonstrates a willingness to cooperate with Archdiocesan offices that promotes inter-cultural ministry such as the Office of Hispanic Ministry, and when appropriate, demonstrates knowledge and experience in a particular ethnic language and culture.

V. PROCESS FOR DETERMINING SPECIFIC QUALIFICATIONS

The requirements of the vacant parish will be determined by the Archbishop in consultation with the Vicar for Clergy and the Priest Personnel Board in the light of the following information:

- A. **The Parish Profile.** The Vicar for Clergy shall maintain a file of parish profiles. The parish profile shall include detailed information on the following:
- ❖ The parish community and neighborhood
 - ❖ The people of the parish, the current staff
 - ❖ The school, the CCD and religious education programs
 - ❖ Liturgy, Eucharistic celebrations and Sacraments
 - ❖ Youth programs, senior citizen programs, special programs
 - ❖ Social services and sponsored agencies
 - ❖ Institutions served by the parish such as hospitals, rest homes, correctional facilities, campus ministries
 - ❖ The pastoral and administrative councils and organizations
 - ❖ Buildings and maintenance, parish finances
 - ❖ Special problems, goals, prospective changes
- B. **Consultation.** When a parish becomes vacant, the Vicar for Clergy shall consult with the Area Vicar, the parish staff, and members of the parish council or leadership to discuss the needs of the parish and the desired qualifications of the pastor in an effort to bring the parish profile up to date. Members of the Priest Personnel Board may assist the Vicar for Clergy in this consultation. The Vicar for Clergy shall prepare a summary profile based on the above information.

VI. PROCESS FOR SELECTION OF PASTORS

- A. **First Consultation.** The Vicar for Clergy shall consult with the following pastors to determine which parishes might soon be declared vacant as of the annual transfer date:
1. Pastors who have reached retirement age.
 - a). Pastors eligible to retire because they have reached 70 years of age.
 - b). Pastors who have reached the mandatory retirement age of 75.
 2. Pastors who have reached the end of their first term in office.
 3. Pastors who have reached the end of their second term.
 4. All the pastors and administrators of the Archdiocese asking whether they wish to be transferred and have the parish listed as open.

B. Listing vacant parishes.

1. The Vicar for Clergy shall send a letter to all priests listing the parishes which will be vacant as of the annual transfer date. This letter will request a reply, within ten days, from any priest wishing to be considered for a transfer to a parish listed as vacant, or a transfer to a parish that may become vacant as the process of transferring pastors develops.
2. When writing the letter to the Vicar for Clergy, pastors shall state their first, second, and third choices from the list of vacant parishes.

C. The Second Consultation.

1. The Vicar for Clergy shall contact all the priests who have applied for parishes and discuss with them the parishes for which they have applied. He will give them the parish profiles and invite them to visit with the pastors, staffs, and pastoral councils of the parishes. He may also suggest that they consider other parishes.
2. The Vicar for Clergy shall contact all the priests who have indicated they would like to be informed about parishes which might become vacant. He will discuss with each of them the parish or kind of parish in which they would be interested, and keep them apprised as vacancies unfold.
3. The Vicar for Clergy may contact other priests and ask them to consider a transfer to one of the parishes which is vacant, or one which may become vacant.
4. During this second consultation, the Vicar for Clergy shall keep the Archbishop and the Priest Personnel Board informed at the regular Priest Personnel Board meetings. He may also ask Priest Personnel Board members to assist him in this consultation. The Archbishop and the Priest Personnel Board may suggest names of priests who might be asked to consider parishes which are vacant or might become vacant.

D. Nomination.

1. The Vicar for Clergy shall propose a list of appointments to the Priest Personnel Board along with a rationale. He may present alternatives, if he deems it advisable.

2. The Priest Personnel Board may request an interview with any of the priests proposed for assignment, or ask the Vicar for Clergy to make further consultation concerning any of the proposed transfers.

E. Recommendation.

1. The Priest Personnel Board shall make final recommendations to the Archbishop for his consideration and approval.
2. It is understood that in all archdiocesan appointments, the Archbishop shall make the final decision.

F. Appointments

The Archbishop shall appoint the pastors by letter. Ordinarily, appointment letters shall be sent during May, and the effective appointment date shall be July.

1. The priests shall receive their letters of appointment before any public announcement is made.

VII. TEAM PASTORATE

- A. When circumstances require it, the pastoral care of a parish or of several parishes taken together may be assigned to a team of priests with one of them assigned by the Archbishop to act as moderator in exercising pastoral care, that is, he shall coordinate their joint action and shall be responsible for it to the Archbishop.
- B. The Archbishop, in consultation with the Vicar for Clergy and the Priest Personnel Board, shall designate the parish or parishes open for a team pastorate. The Priest Personnel Board shall make its recommendation both as to team status and the number of team pastors, after consulting the Area Vicar, the former pastor, and the parish pastoral and administrative councils, or leadership involved. A profile of the parish or parishes shall be sent to all priests of the diocese with an invitation to apply for a team pastorate and a recommendation as to the number and qualifications of the team. Only those priests will be eligible for a team pastorate who would otherwise be qualified for individual pastorates.
- C. Applicants for a team pastorate must jointly submit a resume describing their qualifications, their proposal for joint pastoral action and their plan for meeting the pastoral needs of the parish and the specific reasons in the parish profile for entrusting the parish or parishes to a team pastorate.

- D. The Vicar for Clergy and the Priest Personnel Board shall interview the prospective team or teams and make recommendations to the Archbishop who shall make the final decision.
- E. All priests of the team shall be appointed pastor in solidum. The team may be asked by the Vicar for Clergy to recommend a moderator.
- F. The team shall be evaluated as individuals and as a team in accordance with the policy of the Archdiocese on evaluation and term of office.
- G. When a team, for any reason, loses a member, the team ministry shall be subject to evaluation by the Priest Personnel Board. The parish, however, does not thereby become vacant. Additional members to the team shall only be appointed upon application after consultation with the team and the Priest Personnel Board.
- H. If the moderator resigns, is transferred or otherwise ceases from office, a new moderator shall be appointed by the Archbishop from among the team members after consultation with the team, the Vicar for Clergy and the Priest Personnel Board. In the meantime, the oldest member of the team by assignment and then by seniority shall act as moderator.

VIII. ADMINISTRATIVE TRANSFER

- A. The Archbishop may reserve some pastoral assignments by reason of their nature, the good of souls, the utility of the Church and special needs. In such cases the Archbishop may directly request a pastor to accept a transfer from his parish or to some office. The parish to which the priest will be transferred is not listed as vacant.
- B. Such transfers should ordinarily be voluntary and accepted for the love of God and the good of souls. If the pastor, however, declines to comply with the request of the Archbishop, he shall give his reasons in writing and the Archbishop shall consult with the Priest Personnel Board at least in general regarding his own reasons for the proposed transfer and the objections of the pastor. The Priest Personnel Board shall also interview the pastor and make its recommendation to the Archbishop.
- C. If the pastor still refuses and if the Archbishop still thinks that the transfer must be made, he may issue a written singular decree of transfer notifying him of his new assignment, the date on which he shall take up his new duties, and the date on which his present parish shall be declared vacant.
- D. The Priest Personnel Board shall maintain strict confidence in matters of administrative transfer.

IX. RETIREMENT AND RESIGNATION

- A. At any age a pastor may request a change to parochial vicar and thus remain active in parish ministry without the responsibility of administration.

- B. At age 75 every pastor shall offer his resignation from the office of pastor to the Archbishop, who, after weighing the circumstances and in consultation with the Priest Personnel Board, shall decide if it is to be accepted or deferred.
- C. At age 70 every pastor may request to retire from office. The Archbishop shall ordinarily not refuse such voluntary resignations. (All priests receive retirement benefits).
- D. At age 65 pastors may voluntarily request early retirement and shall receive appropriate pension in accordance with Archdiocesan policy, provided their resignation is accepted by the Archbishop after consultation with the Priest Personnel Board.
- E. All priests who have retired from ecclesial office remain priests and are encouraged to assist with coverage in parishes when needed.

X. ADMINISTRATIVE REMOVAL

- A. There are times when the Archbishop must administratively remove a pastor, when for some reason his ministry results in harm or at least inefficacy, even without grave fault on the pastor's part. The just causes for which a pastor can be requested to resign or even be removed from his parish include:
 - 1. A manner of acting which brings grave harm or trouble to the ecclesial community.
 - 2. Lack of experience or permanent mental or physical illness which impairs a pastor from usefully performing his duties.
 - 3. Loss of good reputation or severe conflict with the parish even when this conflict is unjust and not universal and when reconciliation has been attempted and failed and it is foreseen that such problems will not cease within a reasonable time.
 - 4. Poor administration in financial matters with serious damage to the Church as often as other solutions such as lay administration or administration by a parish vicar cannot be supplied. Such problems should be corrected by an evaluation, and if necessary, the pastor may at that time seek remedial assistance or transfer or voluntarily resign.
- B. If such solutions are not available or successful, the Archbishop, after consultation with the appropriate parties, including the Area Vicar, shall discuss the matter with the Priest Personnel Board and hear its evaluation and recommendation. After this consultation, he may persuade the pastor to resign within 15 days, giving his reasons and the recommendation of the Priest Personnel Board. The pastor may resign simply or with a condition attached, provided the condition is accepted by the Archbishop. The resignation shall be in writing or orally before two witnesses.

- C. If the pastor does not respond or refuses to resign without giving reasons, the Archbishop shall once more request his resignation by a certain date. After a second refusal to respond or to resign without giving reasons, the Archbishop may remove the pastor by letter and declare the parish vacant.
- D. If the pastor, however, gives motives for opposing his resignation, he shall be invited to present such reasons in writing and/or personally to the Archbishop. He may also request a hearing with the Priest Personnel Board, or the Archbishop shall refer the matter again to the Priest Personnel Board. The pastor has the right to review all accusations and evaluations and even to bring witnesses and other proof to his hearing.
- E. The Archbishop shall hear once again the evaluation and recommendation of the Priest Personnel Board. He may then decide that despite the reasons of the pastor, the good of souls demands the removal of the pastor. The singular decree of removal shall be in writing. The motives shall be preserved in writing and shall be confidential and made available only upon canonical appeal or recourse.
- F. Once the pastor is removed, the Archbishop shall consult with the Priest Personnel Board regarding the best assistance to be given the priest, by transferring him to another parish, by assigning him to some other office if he is capable, or by granting him a pension and providing him with the opportunity for special counseling or medical assistance if appropriate.
- G. Once a pastor has been removed, he must abstain from exercising the office of pastor and vacate the parish rectory.
- H. If the pastor appeals or seeks recourse against a letter of removal, the Archbishop cannot name a new pastor but shall appoint an interim pastor or administrator of the parish. If the pastor does not appeal or seek recourse, the Archbishop shall declare the parish vacant.

CHAPTER V
PARISH ADMINISTRATORS

- I. When a parish is vacant and a new pastor has not been assigned or transferred, the Archbishop shall appoint a parish administrator as soon as possible. A parish administrator shall also be assigned if the pastor is prevented from exercising his parish duties by reason of incapacity, poor health, extended administrative leave, or for any other reason. Finally, the Archbishop, if he judges that it is expedient, may assign a parish administrator in the case where the pastor is to be absent from the parish for a considerable time (e.g., for a sabbatical).
- II. If the parish becomes vacant and a parochial vicar has been assigned to the parish, he may be appointed parish administrator until such time as a new pastor is assigned. The parochial vicar shall not be obliged to remain as parish administrator for a period longer than one year merely for such reasons as lack of seniority. If he is better qualified as pastor than other applicants, or if a better qualified pastor is not available, the Archbishop may appoint the parochial vicar as pastor.
- III. During his assignment the parish administrator is bound by the same obligations and enjoys the same faculties and rights as a pastor. However, because he lacks the stability of the office of pastor, he may not do anything which could prejudice the rights of the pastor. After completing his assignment, the administrator shall render an account to the returning pastor or the new pastor. Recently ordained priests, those priests, not incardinated in the Archdiocese or serving in the Archdiocese on a temporary basis, may in special circumstances, be appointed parish administrators.
- IV. Generally, it is the practice that priests who have been ordained less than 5 years will be assigned as an administrator, but after 2-3 years may apply to the Archbishop to be assigned as pastor.

CHAPTER VI PAROCHIAL VICARS

I. THE POSITION OF PAROCHIAL VICAR

- A. Where it is necessary or helpful for the pastoral care of a parish, one or more parochial vicars may be appointed. The parochial vicar shares as a co-worker with the pastor in the pastoral care of the congregation and community assigned to him. Under the direction of the pastor, he cooperates in the ministry of Christ and his bishop, teaching, sanctifying and pastoring in the parish or parishes to which he is assigned.
- B. The parochial vicar may be assigned to assist in carrying out the total pastoral ministry for the entire parish, for a determined section of the parish or a certain group of parishioners. He may also be assigned to exercise a particular pastoral ministry in several designated parishes at the same time.
- C. The Archbishop freely assigns parochial vicars taking care, however, to consider the needs of the parish or group of parishes, the qualifications of the candidate as well as his need to develop pastoring skills.

II. NORMS FOR DETERMINING WHICH PARISHES ARE ASSIGNED PAROCHIAL VICARS

- A. The Archbishop shall determine the parishes in which parochial vicars are assigned to share in the pastoral ministry after consultation in accordance with the following norms.
- B. The Archbishop freely appoints a parochial vicar after conferring with the Vicar for Clergy and Priest Personnel Board. Determination will be made after comparing:
 - 1. The ability of the pastor to collaborate with the parochial vicar as a co-worker in the priestly ministry.
 - 2. The ability of the pastor to guide, advise and evaluate the ministerial performance of a parochial vicar and assist him in developing his priestly potential and improving his ministerial performance appropriate to his years in the ministry.
 - 3. Relative geographical size of the parishes.
 - 4. The population of the parishes.

5. The proximity of the other parishes.
6. The special needs of the people of the parish.
7. The priests available for ministry as parochial vicar.
8. Needs of the Area Vicariate (e.g. Spanish speaking priest).

III. MINISTERIAL RESPONSIBILITIES OF A PAROCHIAL VICAR

- A. A parochial vicar shares in some or all of the responsibilities of the pastor listed in the section of the policy on pastors.
- B. Upon assignment as a parochial vicar and each year subsequently, the parochial vicar should work out with the pastor or group of pastors a job description identifying:
 1. Those areas for which he is principally responsible.
 2. Areas in which he works together with the pastor.
 3. Areas in which he shares responsibility with a parochial vicar or other staff person.
- C. When appropriate, specific objectives should be set for each area of responsibility in line with general parish and Archdiocesan goals.
- D. During the years before a priest is assigned as an administrator or pastor, he ought to have the opportunity to exercise responsibility in all the major areas of pastoring and thus be given the chance to develop pastoral skills by experience and evaluation.

IV. THE ASSIGNMENT OF PAROCHIAL VICARS

- A. In making the annual assignments of parochial vicars, the Archbishop shall ordinarily use the Vicar for Clergy and the Priest Personnel Board in a consultative process designed to best serve the needs of the people of the Archdiocese, to insure cooperation between pastors and parochial vicars and to allow for a variety of ministerial experiences for the parochial vicar.
- B. Parochial vicars, interested in moving, will contact the Vicar for Clergy by a specified time.

- C. The Vicar for Clergy will contact pastors then to inform them of those parochial vicars who are available for transfer
- D. The Vicar for Clergy shall interview all of the candidates and the pastors of the parishes. On the basis of this information, he shall present his recommendation for assignments to the Priest Personnel Board.
- E. The Priest Personnel Board may request an interview with one or more of the applicants or pastors. Finally, the Priest Personnel Board shall make recommendations to the Archbishop who shall make the final decision.

V. EVALUATION

- A. The purpose of evaluation is to arrive at an objective assessment of a priest's skills and achievements as well as his weaknesses, to facilitate his development of pastoral skills and to assist those making appointments in developing a clear and realistic idea of a priest's abilities.
- B. Evaluation ought to be as objective as possible based upon the actual accomplishments of one's work, not on subjective impressions. Parochial vicars should be evaluated upon their achievements of pre-established objectives and performance of principal duties clearly stated in the parochial vicar job description.
- C. Evaluation shall be done by the pastor with the participation of the parochial vicar. Staff persons and/or other lay persons with whom the parochial vicar has been working may be invited to assist in the evaluation of those areas in which they have been working together.
- D. In making the evaluation, it is recommended that the persons evaluating use the form prepared by the Office for the Vicar of Clergy.
- E. Evaluations shall be kept in strictest confidence in the priest's personal file in the Clergy Office.

CHAPTER VII
PARISHES STAFFED BY RELIGIOUS INSTITUTES

- I. The Archbishop, after consulting with the Priest Personnel Board and with the consent of the competent superior of the institute, may assign a parish to an Institute of consecrated life or a Society of Apostolic Life. Such assignment may be either perpetual or for a predetermined period or by contract revocable at will under certain conditions. In all cases, a written agreement between the Archbishop and the competent superior shall be made, clearly and accurately defining the mission of the parish, the qualifications and number of persons to be assigned and financial matters.
- II. The Vicar of Clergy shall review all previous agreements, oral, customary, or written, and shall maintain a file of all such authorized agreements.
- III. In accordance with general law and the above mentioned agreements, the Archbishop shall assign pastors to religious parishes upon presentation by the competent superior. The competent superior shall present pastors in accordance with Archdiocesan qualifications and shall initiate consultation procedures in accordance with Archdiocesan policies as applicable.
- IV. The Archbishop may freely remove a pastor who is a member of an Institute of consecrated life or Society of Apostolic Life, at his own prudent judgment, after consulting with the Priest Personnel Board and notifying the competent superior. He must remove him when asked to do so by the same competent superior in accordance with the general law.
- V. The Archbishop shall likewise assign parochial vicars to religious parishes upon presentation of the competent superior. The Archbishop may freely remove parochial vicars and must do so when requested by the competent superior. The number of parochial vicars to be assigned a religious parish shall be determined by the Archbishop.
- VI. The Archbishop may terminate the agreement with the competent superior in accordance with the general law and the specific agreement. In such cases, the Archbishop, after consultation with the Priest Personnel Board, may declare the parish vacant and available for diocesan assignment.

CHAPTER VIII SPECIAL MINISTRIES FOR PRIESTS

I. PURPOSE OF SPECIAL MINISTRIES

- A. The primary purpose of any specialized ministry is to provide pastoral care for the People of God in areas of special need.
- B. The secondary purpose of special ministries is to utilize the expertise, education and/or experience of priests.

II. QUALIFICATIONS OF THOSE FILLING SPECIAL MINISTRY POSITIONS

- A. Specialized ministries are extensions of one or several of the roles of pastor. Therefore, in the selection of someone for a special ministry requiring a priest, the general qualities of a pastor must be considered.
- B. Some specialized ministry positions require a priest because they are parallel to the position of pastor (e.g., President Rector of the Seminary or military chaplain).
- C. Some specialized ministry positions may require a priest because of some special reason (e.g., Vicar for Clergy).
- D. Other special ministry positions do not require a priest.
- E. The Archbishop may consult with the Vicar for Clergy and the Priest Personnel Board regarding which special ministry positions in the Archdiocese should be filled by a priest.
- F. In addition to the general qualities of pastor, each special ministry position has some specific requirements and qualifications. These specific requirements for each position shall be listed by the Vicar for Clergy. In determining these requirements, he shall use the Priest Personnel Board and consult with the agency or institution concerned.

III. THE PROCESS FOR FILLING SPECIAL MINISTRY POSITIONS

- A. When a vacancy occurs in a special ministry position in the Archdiocese by resignation, transfer, illness or death, the Vicar for Clergy in consultation with the Priest Personnel Board shall determine whether or not the position must be filled by a priest.
- B. If the position can be filled by a lay person, it shall be referred to Human Resources for advertisement and placement. A priest, with the permission of the

Archbishop, may apply.

- C. If the position can only be filled by a priest, it shall be referred to the Vicar for Clergy.
- D. The Vicar for Clergy shall publish the position among the priests of the Archdiocese (and if appropriate, outside the Archdiocese).
- E. Applications received shall be sent by the Vicar for Clergy to the agency or institution for its screening and recommendations.
- F. The agency or institution shall be asked to give three recommendations in the order of preference, if that is possible.
- G. The Vicar for Clergy, after consulting with the Priest Personnel Board, shall make a recommendation to the Archbishop for his approval and appointment.

IV. CREATION OF NEW SPECIAL MINISTRIES

- A. In order to accomplish the work of spreading the Good News, the Church has traditionally relied on both parish and special ministry. While continuing to encourage ministries which are already functioning successfully, the Archdiocese welcomes new and creative special ministries which can more effectively meet the particular needs of this time. Proposed special ministries shall be evaluated in the light of the priorities of the Archdiocese, of the personnel available and the goals and objectives of the proposed ministry.
- B. These procedures for establishment of new forms of ministry shall be followed.
 - 1. Suggestions for new forms of ministry shall be presented in written form to the Vicar for Clergy.
 - 2. In consultation with the Priest Personnel Board, he shall evaluate the proposed ministry and make a recommendation to the Archbishop whether or not the new special ministry should be established and whether it should be filled with a priest.
 - 3. The Priest Personnel Board shall then make a recommendation to the Presbyteral Council regarding the proposed special ministry and upon recommendation of the Council, shall refer the establishment of this new form of priestly ministry to the Archbishop for his final decision.
- C. New forms of ministry shall be evaluated according to the following process.

1. Based upon the goals and objectives of the new ministry, the priorities of the Archdiocese and the demands for personnel, criteria shall be developed for the evaluation of each new ministry.
2. The Priest Personnel Board shall, after three years, determine whether this new form of ministry should be renewed or discontinued and so advise the Archbishop.

V. EVALUATION OF PRIESTS IN SPECIAL MINISTRIES

- A. Prior to the effective date of the appointment, the priest shall meet with the Vicar for Clergy and the Archbishop to discuss his personal goals with reference to the special ministry and to review the agency profile and personnel position description.
- B. After six months to a year in special ministry, the priest shall meet again with the Vicar for Clergy and if possible the Archbishop to update his personal goals, to specify the goals of his agency in the context of the priorities of the Archdiocese and to update the agency profile and personnel position description.
- C. At the end of three years in the assignment, there shall be an evaluation of his performance. The priest in special ministry shall report on his progress in achievement of his goals, on the degree these goals have influenced the life of the agency, on any changes in the agency profile and on his plans to remain in this assignment or to seek transfer.
- D. This process shall be repeated every three years.
- E. While there shall be no fixed tenure for the office of special minister, the Priest Personnel Board, based on the triennial evaluation, shall make recommendations to the Archbishop regarding the special minister's continuance in office for another three years or transfer. Such recommendations shall take into account the personal goals of the priest in special ministry as well as his progress in achieving the agency and Archdiocesan priorities.

CHAPTER IX AREA VICARS OR DEANS

I. AREA VICARIATES

To provide for the best possible care of parishes and for common pastoral action, parishes in the Archdiocese are joined together in Area Vicariates which replace the former Deaneries. The Archbishop, after consulting the Presbyteral Council, may establish, modify, combine or suppress Area Vicariates according to the needs of pastoral activity. In accordance with the Second Vatican Council, the Area Vicariate is established to coordinate and facilitate common pastoral action in the same territory or social region. With the help of the Vicar, the clergy, religious men and women and lay ministers, Pastoral Council Representative and parish leaders in the Area can work together as a vital cell of the Archdiocese. Hence, the vicar with true apostolic solicitude shall animate the local presbytery and pastoral ministers; he shall be a priest who exercises the care of souls and by his learning and prudence, piety and apostolic work commands the highest respect of the clergy and people.

II. THE AREA VICAR

The office of Area Vicar is not connected with the office of pastor of a specific parish. Any priest with Archdiocesan appointment who resides in or is assigned to the Area Vicariate may be appointed by the Archbishop as Area Vicar after consulting the Vicariate in accordance with this policy. The Area Vicar shall serve for a term of three years and may be reappointed. The Vicar ceases from office by death, by resignation, accepted by the Archbishop, or by transfer from the Vicariate.

III. SELECTION AND APPOINTMENT OF THE AREA VICAR

The Archbishop shall appoint the Area Vicar selected by the Vicariate in accordance with the following process:

- A. The clergy of the Vicariate shall assemble whenever the office of Area Vicar is vacant, and at least every three years. The clergy may be convened by the previous Area Vicar, or in his absence by the Vicar for Clergy or his delegate.
- B. The clergy shall determine the manner of selection of the Vicar.
 - 1. The clergy may consult other pastoral ministers and parish leaders (or parish councils) and shall determine the manner of consultation, including possible participation in the election process if appropriate.
 - 2. The Vicariate may nominate the Vicar for appointment by the Archbishop.

3. The Vicariate may also present several names to the Archbishop for appointment at his discretion.

IV. DUTIES OF THE AREA VICAR

Besides those duties assigned to the "Dean" or "Vicar Forane" by the general law, the Area Vicar shall carry out in the name of the Archbishop the following duties:

- A. The Vicar shall visit the parishes and presbyters in his Area. He shall promote, guide and coordinate all projects and undertakings for pastoral action in the Vicariate under his care which the clergy, religious and the laity undertake.
- B. He shall manifest fraternal concern for the clergy and others engaged in the ministry, have a trusting relationship with them, and engage in common planning with them for a fruitful parish ministry. He shall make sure that spiritual helps are provided for the clergy, that they are not lacking the means for fair and decent living, and he shall be particularly concerned about and frequently visit priests who are in difficult circumstances, or upset by problems. He shall see that the parish priests of his Area who may be seriously ill do not lack spiritual or material help.
- C. The vicar shall canonically install pastors in the Area and facilitate the installation ceremonies.
- D. The Vicar may be consulted regarding nomination, transfer or removal of clergy in the Area in accordance with the policies in this Manual.
- E. The Vicar shall convene the clergy in the Vicariate and assist them in obtaining necessary support and temporary replacement in cases of sick leave, professional leave or when a temporary parish administrator must be appointed.
- F. The Vicar shall convene the clergy, pastoral ministers and parishes of the Area for participation in Area and Archdiocesan planning and priority setting. The Vicar shall also encourage and facilitate Area programs.
- G. The Vicar shall convene the appropriate pastors and parishes for consultation and recommendation to the Archbishop regarding new parishes, parish boundaries and suppression of parishes or missions.
- H. The Vicar may also be elected as Presbyteral Council Representative if appropriate, and in their absence shall convene the clergy for such purposes.
- I. The Vicar shall report at least annually to the Archbishop on the state of the parishes in the Area, on the work done and the work planned, and on the

circumstances and wishes of the priests and others who are engaged in the ministry in the Area. The Archbishop shall convoke meetings of the Vicars at opportune times to discuss particular Archdiocesan affairs with them and to receive information on the condition of the Archdiocese.

- J. The Archbishop may suitably grant additional faculties to the Vicar for the entire Area.

CHAPTER X SEMINARIANS

I. PREAMBLE

The policies in this chapter do not cover all policies concerning seminarians but only those which relate to the personnel policies and program of the Archdiocese. It is understood that the *Personnel Manual* does not include personnel policies of seminaries and other formation programs.

II. THE ADVISORY COMMITTEE FOR SEMINARIAN ADMISSION

Definition: The Committee is an advisory committee to the Director of Vocations. The committee assists the Vocation Director in the acceptance process of a man applying for priesthood. The Director of Vocations shares results with the Archbishop for his final decision.

- A. The Advisory Committee shall consist of three priests with Archdiocesan appointments, the Archdiocesan Director for Child Protection, a member of a religious community, two at-large active parish members, and the Director of Vocations. The Director of Vocations is the chairman of the committee. The Director of Vocations, in consultation with the Archbishop can change the make-up of the committee depending on the needs of the Archdiocese.
- B. The members shall be appointed by the Director of Vocations in collaboration with the Archbishop.
- C. The function of this Committee shall be threefold:
 - 1. Each member shall review the application forms as provided by the Director of Vocations. At the end of the committee meeting all members are asked to leave all materials with the Director of Vocations.
 - 2. Each member shall individually interview applicants for the Archdiocese and write up a report of the interview for the Director of Vocations. The interview should be based on the four Pillars of Formation: Human, Spiritual, Intellectual and Pastoral.
 - 3. The Committee shall meet to discuss each applicant and make a recommendation, about the applicant, to the Director of Vocations
- D. The Director of Vocations gives the entire file (applications forms, all interviews, references, psychological reports, recommendations of the advisory committee for seminarian admissions) to the Archbishop for his final decision about the applicant.

III. FORMATION PROGRAMS

- A. Mt. Angel Seminary is the primary center of formation and education for the Archdiocese of Portland in Oregon. The Director of Vocations may send seminarians to another Seminary approved by the Archbishop.
- B. The Director of Vocations shall work in collaboration with the Seminary to determine the on-going needs of the seminarian and to encourage the seminarian during the process of formation.
- C. The Director of Vocations will help the seminarian foster his gifts and talents to best serve the needs of the Archdiocese and will help the seminarian build a relationship with the Archdiocese, knowing its history, priests and people.

IV. FINANCES

- A. The Archdiocese of Portland will pay for the entire cost of a seminarian's education.
- B. Seminarians are required to apply for grants and scholarships to aid in the cost of education.
- C. Debt
 - 1. A seminarian of the Archdiocese with debt may apply to the Archdiocese for financial assistance.
 - 2. A promissory note is prepared by the financial department and given to the Vicar General for his approval and signature.
 - 3. If the seminarian leaves the Archdiocese, he is responsible to re-pay the remainder of the loan and must re-pay the Archdiocese of Portland for any money already paid on the loan.

CHAPTER XI RESIDENCE

I. RESIDENCE OF PASTORS, PAROCHIAL VICARS AND TRANSITIONAL DEACONS

- A. The parish or parishes to which the pastor, parochial vicar or transitional deacon is assigned shall provide him with housing and meals in accordance with the remuneration policy. (See Chapter XV "Housing" and "Meals")
- B. A priest may be permitted for good reason to live outside the house in the parish to which he is assigned, particularly in a house where several priests lead a common life, provided this does not interfere with the carrying out of his pastoral duties. Permission for these special living arrangements must be obtained from the Archbishop who shall consult with the Priest Personnel Board and the Vicar for Clergy before he makes a decision. The Vicar for Clergy shall consult with the other priests residing in the parish house or rectory before making his recommendation.
- C. When a priest has received permission for special living arrangements, the parish or institution he is assigned to will be responsible for the housing allowance and the meals allowance annually set by the Archdiocese. An additional payment for housing will be determined by the Vicar for Clergy.

II. RESIDENCE OF PRIESTS IN SPECIAL MINISTRIES

- A. Priests who have assignments in special ministries in institutions or agencies of the Archdiocese shall also be assigned a place of residence.
- B. Priests working in specialized ministry for agencies or institutions not part of the Archdiocese shall be responsible for providing their own room and board. Living arrangements, however, should be made in consultation with the Vicar for Clergy.

III. PRIESTS LIVING IN RESIDENCE IN PARISHES

- A. Priests who are in residence in parishes normally shall be expected to help out on weekends. If they are working five days during the week in an archdiocesan assignment, they should not be expected to work in the parish on Saturday.
- B. If priests in residence help on Sundays, they shall not be expected to pay housing and meals; however, if they do no work in the parish, they or the institution they are working for shall pay for housing and meals in the amount determined by the Vicar for Clergy.

CHAPTER XII LEAVES AND VACATIONS

I. SICK LEAVE

- A. If a priest is unable to continue his pastoral responsibilities because of illness, he is to consult with the Archbishop or the Vicar for Clergy. At the time of this first meeting, the priest will bear with him a letter from his physician. The letter will indicate (1) the nature of the priest's sickness, (2) the type of therapy that should be followed, and (3) the probable time that the priest will be on leave. After consulting the Priest Personnel Board and the Vicar for Clergy, the Archbishop may place him on sick leave, or, if the case should warrant, the priest may be asked to obtain another medical opinion.
- B. For the financial arrangements for sick leave see Chapter XV "Remuneration and Retirement".

II. PERSONAL LEAVE

- A. If a priest desires a leave of absence for personal reasons, he shall discuss the matter with the Archbishop or the Vicar for Clergy. The Archbishop may choose to grant the leave without consulting the Priest Personnel Board. However, in such cases he shall inform the Priest Personnel Board of his decision and in a general way give his reasons.
- B. A leave of absence for personal reasons will generally not be granted for a period of time exceeding one year.
- C. When a leave is granted, the Archdiocese will continue to pay the priest's health insurance premiums for a maximum of one year or until such time as the premiums are paid as part of other employment.
- D. Normally the Archdiocese is not responsible for salary or other benefits in the case of a leave of absence for personal reasons. However, financial arrangements may be made on an ad hoc basis.
- E. A formal Memorandum of Agreement for Personal Leave will be signed by the Archbishop and the priest requesting the leave. This Memorandum will outline the obligations of both parties during the time of leave.

III. RELEASE FROM ARCHDIOCESAN ASSIGNMENT

- A. Such a release is understood to be a leave to serve (as a priest in a non-diocesan assignment). Such a release could be for chaplaincy, teaching, counseling,

research or service in another diocese.

- B. Request for such release must be made to the Archbishop or Vicar for Clergy. The Archbishop reserves the right to judge and approve individual requests but shall consult with the Priest Personnel Board and the Vicar of Clergy before rendering final judgment. Neither the priest's salary nor health benefits follow him to his new position.

IV. MILITARY LEAVE

Requests for such leave must be made to the Archbishop or the Vicar for Clergy. The Archbishop reserves the right to judge and approve individual requests after consulting the Priest Personnel Board and Vicar for Clergy.

V. VACATIONS

All priests holding a diocesan assignment are entitled to four weeks of vacation a year. The priest himself is responsible for finding a replacement for weekend assistance. The Parochial Vicar must obtain the approval of the pastor in advance for vacations arrangements. Pastors must inform the Vicar for Clergy when they are going to be away from the parish for more than a week. (This is to conform with Canon 533,2.)

Normally vacation is taken within the fiscal year. International priests may accrue some or all of their vacation up to 2 months over a 3 year period for the purpose of traveling to their home country. However, vacation arrangements must be approved in advance by the pastor. If the priest is reassigned to another parish or institution before taking the accrued vacation, the parish where the priest was assigned will pay replacement cost for the accrued vacation now being used. The Vicar for Clergy should be informed of any vacation accrual. He will keep a record of the amount accrued.

VI. DAYS OFF

All priests holding a diocesan assignment are entitled to one and one half day off per week. To the degree that it is possible, this day should be as free from scheduled responsibilities as the local situation permits. A Communion Service or another service of prayer should be considered in lieu of Mass when the limitation of personnel so indicates.

VII. RETREATS

All priests are asked to attend the annual priest's retreat. In addition to the annual retreat, all priests holding a diocesan assignment are entitled to five days leave in a calendar year to afford them a period of reflection and prayer. (See Chapter XV "Paid Leaves".)

VIII. PROFESSIONAL LEAVES

- A. All priests holding a diocesan assignment are entitled to fourteen days professional leave each year. These days may be taken in a block or broken up. (See Chapter XIII "Continuing Education" and Chapter XV "Paid Leaves".)
- B. Professional leaves may be used for workshops, institutes, lectureship series, professional conventions, privately arranged study programs, etc.

IX. UNAUTHORIZED LEAVE

- A. A priest who leaves his assignment without permission of the Archbishop is considered to be on unauthorized leave.
- B. The effects of such action are:
 - 1. The withdrawal of faculties.
 - 2. The cessation of salary and participation in the retirement program.
- C. The health insurance will be paid by the Archdiocese for six months, or until such time as alternate coverage has been obtained, whichever comes first.

X. LAICIZATION

Priests who wish to make application for laicization are to contact the Vicar for Clergy who will advise them on procedure.

CHAPTER XIII CONTINUING EDUCATION

I. THE NATURE AND THE NEED FOR CONTINUING EDUCATION

- A. The Priest Continuing Education Board encourages all priests of the archdiocese to pursue further study in areas that will improve their effectiveness as ministers of God's people. Studies that directly enhance a priest's ability to preach, celebrate the sacraments, fulfill administrative duties, or promote the mission of the Church in the larger community will be given high priority.
- B. Continuing education includes the following:
 - 1. self study;
 - 2. workshops, conferences, and other forms of in-service training;
 - 3. programs designed to enhance the professional and spiritual development of the priest;
 - 4. language programs and pastoral renewal programs;
 - 5. sabbatical programs; and
 - 6. degree programs.

II. THE PRIEST CONTINUING EDUCATION BOARD

- A. Membership
 - 1. Membership on the Priest Continuing Education Board shall be limited to priests incardinated in the Archdiocese of Portland. Membership shall be chosen from the five age groups. Each age group shall elect one of its members to serve on the Priest Continuing Education Board. In addition the Continuing Education Director shall serve as an ex-officio member without a vote. The Archbishop, Auxiliary Bishops, and the Vicar for Clergy may always exercise their right to attend Priest Continuing Education Board meetings.
 - 2. Members shall serve a term of three years.
 - 3. Elections shall be in conjunction with the annual Priest Convocation.
 - a). The Vicar for Clergy shall draw up an up-to-date list of all

incardinated priests within the Archdiocese, not including those who are retired or on leave of absence, and shall divide the priests into five equal groups on the basis of seniority of ordination.

- b). At the annual Priest Convocation the age group caucuses will choose from their group a priest to serve on the Continuing Education Board, when the term of the one representing them will have ended.
 - c). If the election process fails to elect outside the dominant culture then one may be appointed by the Director of Continuing Education in consultation with the Board.
4. The Priest Continuing Education Board shall elect from its membership the following: a chairman, to preside at all meetings, to appoint committees, and to represent officially the Priest Continuing Education Board except in those situations where he deems it advisable to appoint a delegate; a vice-chairman to carry out the above responsibilities in the chairman's absence; and a secretary to prepare minutes and mail them to members of the board and to the Archbishop. The offices of vice-chairman and secretary may be held by the same member. The office of the Continuing Education Director may provide secretarial services for keeping minutes as well as for preparing and mailing agendas. Officers shall serve for one year and may be re-elected.

III. THE CONTINUING EDUCATION DIRECTOR

The Continuing Education Director is appointed by the Archbishop and is accountable to the Vicar for Clergy.

IV. CLASSIFICATION

- A. Self Study: designed by the individual, and based on professional reading and study.
- B. In-Service Training: includes workshops, conferences, and other forms of in-service training for professional development.
- C. Personal and Spiritual Development: programs of up to two weeks designed to enhance the personal and spiritual development of the individual priest.
- D. Language Programs and Pastoral Renewal Programs: includes institutes of up to four weeks for language study or for pastoral renewal.

- E. Sabbatical Programs: three to four month programs for professional development and personal renewal.
- F. Degree Programs: programs which conclude with a professional or academic degree.

V. ELIGIBILITY

- A. Self Study: open to every priest so that he may continue to meet the educational and professional needs of the ministry.
- B. In-Service Training: open to every priest so that he may continue to meet the educational and professional needs of the ministry.
- C. Personal and Spiritual Development: open to every priest so that he may continue his spiritual growth and personal development. Priests may take up to 14 days of professional leave each year. Priests are also entitled to five days each year for reflection and prayer, in addition to the annual priest retreat.
- D. Language Programs and Pastoral Renewal Programs:
 - 1. Institutes of up to four weeks are generally open to all priests, following consultation with the continuing education director and approval by the Priest Continuing Education Board.
 - 2. Preference will be given, first, according to pastoral need (e.g., a new assignment that requires language training), and then to those who have the longest time span since their last pastoral renewal program. In addition, preference will also be given to those who applied earlier but were not accepted because the quota was filled at the receiving institution or program.
 - 3. Approval is granted by the continuing education director, the Priest Continuing Education Board, and the Vicar for Clergy.
- E. Sabbatical Program
 - 1. Sabbaticals (three to four months) are open to all diocesan priests and may be taken once every ten years.
 - 2. Approval is granted by the Archbishop, after consultation with the Vicar for Clergy, the Director of Continuing Education, and the Priest Continuing Education Board.

F. Degree Programs

1. Depending on the needs of the archdiocese, degree programs are offered from time to time to qualified priests.
2. Approval is granted by the Archbishop, after consultation with the Vicar for Clergy, the Director of Continuing Education, and the Priest Continuing Education Board.

VI. FUNDING

- A. Self-Study. Each parish shall provide each priest an annual sum determined by the Archbishop in accordance with the priest compensation policy of the archdiocese. This sum may accumulate for two years. Up to one half of the continuing education allowance may be used to purchase professional books, periodicals and study materials including software related to professional study. Continuing Education funds may not be used for purchase of a computer. The fee for the annual archdiocesan Priest Retreat is paid by the supporting institution and is not to be considered part of the funding for self-study.
- B. In-Service Training. Same procedure as A.
- C. Personal and Spiritual Development. Same procedure as A.
- D. Language Programs and Pastoral Renewal Programs.
1. The amount of funding shall be allocated annually in accordance with archdiocesan policy. The Priest Continuing Education Board shall submit a budget in accordance with the educational and formational needs of the priests of the archdiocese. At the beginning of the fiscal year, the Director of Continuing Education shall inform the board of the monies available and the number of grants available.
 2. The priest's salary shall be paid by the parish.
 3. The salary of a replacement shall be paid in this ratio: 50% by the parish and 50% by the Archdiocese from funds in the current year's priest continuing education budget. The priest is responsible for finding his own replacement. The Vicar for Clergy shall serve as a resource person for this endeavor.
 4. The tuition, fees, books for the program, transportation, board and lodging shall be paid in this ratio: 80% by the archdiocese from funds in the current year's priest continuing education budget, and 20% by the priest

himself (which may be taken from his continuing education funds).

5. If archdiocesan funds are not available, the priest must apply for a grant with the assistance of the Director of Continuing Education.
(Since there are currently no Archdiocesan funds available to help cover sabbatical expenses, priests are encouraged to plan well ahead for a sabbatical and to apply through the Lilly Foundation for sabbatical funding. They are most generous.)

- E. Sabbatical Programs. Same procedure as in D.
- F. Degree programs. The archdiocese provides full compensation: salary, auto allowance and benefits plus program (tuition and housing) costs. The archdiocese will pay for the transportation to and from the program (one round trip or two one way trips). The priest himself is responsible for other related costs including any transportation expenses other than the transportation expense mentioned above.

VII. APPLICATION PROCEDURES

- A. Self Study. Priests are to use funds allocated annually by his place of employment for the purpose of continuing education. If funds are not available, he may apply to the Director of Continuing Education for assistance.
- B. In-Service Training. Same procedure as A.
- C. Personal and Spiritual Development. Same procedure as A.
- D. Language Programs and Pastoral Renewal Programs. Priests should use the standard application form and submit it to the Director of Continuing Education or the Vicar for Clergy at least three months in advance of the program. The application should include a detailed account of costs. Contact the office of Vicar for Clergy for the application form.
- E. Sabbatical Programs. Priests should use the standard application form accompanied by a letter giving details of the program. These should be sent to the Director of Continuing Education or the Vicar for Clergy. The application will then be discussed by the Priest Continuing Education Board, who will make a recommendation to the Archbishop. The applicant may be invited to consult personally with the Priest Continuing Education Board in order to explain his program. Contact the office of Vicar for Clergy for the application form.”
- F. Degree Programs. The applicant shall write a letter to the Director of Continuing

Education or to the Vicar for Clergy. After consultation with the Priest Continuing Education Board, a recommendation will be made to the Archbishop regarding the degree program. The needs of the archdiocese, as determined by the Archbishop, shall be the primary consideration in determining acceptance.

VIII. EVALUATION

After an extended professional leave, each participant shall fill out the evaluation form and submit it for review by the Priest Continuing Education Board. Contact the office of Vicar for Clergy for the evaluation form.

IX. PROVISION FOR CONTINUING EDUCATION OF THE RELIGIOUS WITH ARCHDIOCESAN ASSIGNMENT

Any religious priest in a full-time archdiocesan assignment is eligible to receive continuing education funding according to the Clergy Compensation Policy of the Archdiocese of Portland. He may also apply for funding to be used for language programs and pastoral renewal programs. Only priests who are incardinated, however, are eligible for sabbatical and degree programs.

CHAPTER XIV
ALCOHOL AND CHEMICAL DEPENDENCIES

I. POLICY

- A. The Archdiocese of Portland in Oregon in accordance with the highest professional authorities, officially recognizes alcoholism and addiction as a human disease which demands our enlightened concern.
- B. This disease, which can and does occur among us, generally manifests itself in a threefold impairment of body, mind and spirit which, unless arrested, can lead to irreparable damage. The victims of addiction need and deserve proper understanding and professional help.
- C. Experience indicates that persons afflicted with this disease are usually blind to the developing symptoms in themselves and are rarely capable of effective self-help. Hence, we consider it our obligation in justice and charity to establish procedures to facilitate proper treatment and productive recovery for such victims among our confreres.
- D. Our primary objective and concern is to relieve pain and suffering, restore health and dignity and return victims to productive and rewarding involvement in the important work of this Archdiocese. In fraternal charity we call for the enlightened cooperation of all in implementing the following procedures.

II. PROFESSIONAL ASSISTANCE

- A. The Vicar for Clergy shall maintain a relationship with experienced professionals in the field of addictions and treatment centers which have a good record in the treatment of addiction. He shall call upon their services as needed for assessment, intervention and to develop a treatment plan for individuals suffering from addiction.
- B. An individual may voluntarily seek help from the Archbishop, the Vicar for Clergy or from a professional without fear or prejudice. The Archbishop or the Vicar for Clergy will assist him in receiving professional help. An individual may also seek help for a confrere without fear or prejudice.

III. IDENTIFICATION

- A. A substance abuse problem may exist when an individual's consumption of alcohol/drugs repeatedly interferes with the proper performance of his assigned duties, reduces his dependability, impairs his inter-personal relations, affects his health and/or reflects discredit to his office.

- B. The problem is not determined by volume or frequency of consumption, but rather in its effect on behavior and function.
- C. In the following material the term "alcoholism" is used as a convenient point of reference. In actual practice, however, it is usually not an isolated phenomenon. Other drugs are frequently concomitantly abused as well.

IV. INTERVENTION

- A. An alcoholic is seldom able to diagnose himself and volunteer for treatment. In the vast majority of cases, constructive coercion has been necessary to effect proper treatment and recovery. All too often, friends, parochial vicars, and superiors have failed to intervene until it was too late to reverse the accumulative damage. There is no moral or medical validity in the old saw, "you can't help an alcoholic until he is ready to be helped." Generally speaking, an alcoholic has to be helped in spite of himself.
- B. Like any other disease, alcoholism can be more effectively treated the earlier it is recognized and dealt with. Therefore, in fraternal charity, it is incumbent on all of us to be able to recognize alcoholism in its early stages and be prepared to initiate effective intervention.

V. TREATMENT

- A. Proper treatment of alcoholism varies in detail from case to case. Prescription shall depend on such factors as duration since onset, degree of impairment, physical and psychological complications, social-vocational complications, insight and motivation. Determination is best made by a team of professionals, such as the panel of advisors, who can make the proper referral.
- B. Generally speaking, effective alcoholism treatment takes place in two stages: 1) the acute phase of detoxification and physical stabilization; 2) the chronic phase wherein the patient is helped to embrace a new value system and life style which enable him to live comfortably and productively without alcohol. Phase 1 should always take place under proper medical supervision. Phase 2 can effectively take place in a variety of settings such as a hospital, clinic, special sanatorium, half-way house and in the fellowship of Alcoholics Anonymous. Even long after an alcoholic has begun the recovery process, he needs companionship and support from those who understand.
- C. During treatment the individual shall receive his monthly salary from the parish or institution to which he is assigned. Should it become necessary to terminate a particular assignment, salary shall be paid from the fund for sick and infirm

priests.

VI. INFORMATION AND EDUCATION

- A. An on-going education and information program on alcoholism and this policy has been inaugurated throughout the Archdiocese. It is anticipated that this program will reach all levels of operation, including clergy conferences and seminaries.
- B. The long-range objective of this program will be "prevention."

VII. POST-THERAPY ASSIGNMENT

- A. The primary purpose of this policy and these procedures is to assist, intelligently and compassionately, those members of our Archdiocese who are disabled by the disease of alcoholism or other chemical dependencies. The only intention of this policy is to help them regain that state of health and well-being which will allow for productive and rewarding ministry in this Archdiocese.
- B. Each individual treated, upon satisfactory completion of therapy, shall be allowed to return to the previous assignment or be given an assignment compatible, insofar as it is possible with his experience, ability and needs.

CHAPTER XV
REMUNERATION AND RETIREMENT

I. MAINTENANCE OF A COMPREHENSIVE COMPENSATION AND RETIREMENT PLAN

- A. The Archbishop will promulgate an annual remuneration schedule for priests. The salary ranges and allowances will be adjusted annually to reflect changes in the cost of living. This schedule shall be sent to all diocesan priests, and all other priests with diocesan assignments as well as parish business managers and bookkeepers.
- B. This schedule shall be sent to all diocesan priests, and all other priests with diocesan assignments as well as parish business managers and bookkeepers.
- C. When requested by the Archbishop or the Presbyteral Council the policy and amounts will be reviewed by a committee consisting of at least the Vicar for Clergy, the Director of Financial Services and two priests selected by the Presbyteral Council. The committee will report its findings and recommendations to the Archbishop and to the Presbyteral Council.

II. RETIREMENT

- A. Social Security and Medicare
 - 1. Priests may choose to take Social Security when they are eligible. Reception of Social Security benefit will have no effect on the compensation they receive from the parish they are assigned to or on their pension benefits if they are retired.
 - 2. Upon attaining Social Security age, a priest should apply for Medicare Part B. The priest shall pay the premium directly to the Federal Government. He may then claim reimbursement for a premium payment from the parish or institution to which he is assigned. Priests who are on approved leave may claim reimbursement from the Archdiocese.
 - 3. When a priest retires the Archdiocese shall transfer him from the group medical plan to supplemental coverage. This insurance covers costs not included by Medicare Part B. The Archdiocese will reimburse the priest for Medicare Part B.

B. Retirement

1. Priests of the Archdiocese may retire at age 70. A priest wishing to retire at age 70 must formally request retirement from the Archbishop and, since changes of assignment are made on July 1, he should normally plan to retire on July 1 after he reaches age 70. If his birthday falls shortly after July 1, he may request to retire on July 1 before he reaches age 70. Priests who retire at age 70 are entitled to the full pension benefit unless they are receiving another pension (See #5 below). The Archdiocese will make up the difference if the benefit from the pension plan is reduced. Even though a priest may continue in an active assignment after age 70, he begins receiving retirement benefits upon reaching age 70. (See : Priest Compensation, Policy 4)
2. Early retirement may be taken at age 65 for serious reasons with the approval of the Archbishop. The retirement benefits shall be proportionately reduced in accordance with the policy of our pension plan.
3. Medical retirement may be taken at any age for medical conditions which prevent a priest from working. Medical retirement requires a written statement from a physician indicating the nature of the medical condition and the effect it has on the priest's ability to work. After a doctor's statement is provided, the approval of the Archbishop is required. Medical retirement may be reviewed annually or more often when appropriate by the Vicar for Clergy. Priests on medical retirement shall receive full retirement benefits.
4. Canon 538, No. 3, requires a pastor to submit his resignation when he has completed his 75th year of age. The Archbishop after considering the circumstances may accept or defer his resignation.
5. If a retired priest receives benefits from any pension plan other than Social Security by reason of service rendered to a non-Archdiocesan institution, organization or agency during his service as a priest, the benefits of the Archdiocesan plan shall be reduced by the amount he is receiving from the other pension plan.
6. If a retired priest requires special care, the Archdiocese will pay the additional cost over and above what he is receiving on retirement only after he has used up his own resources. The priest shall retain his Social Security benefits.
7. The Presbyteral Council recommends that priests of the Archdiocese place in their will a portion of their assets to the Priest Retirement Fund.

III. PRIEST COMPENSATION POLICIES

A. SALARIES

1. Policy

- a) Parishes and other Archdiocesan institutions must pay diocesan or religious priests assigned to them according to the Archdiocesan Priest Remuneration Schedule published each year by the Archdiocese unless another arrangement has been approved in writing by the Archbishop. The remuneration schedule for priests has five different ranges. Each priest is placed in one of the ranges based on his assignment. Within each range the differences are based on the number of years a priest has been ordained.
- b) Priests may receive a Christmas bonus if the other employees of the parish or institution receive the same bonus. No other bonuses may be given.
- c) Parishes and Archdiocesan institutions may not give allowances to priests unless they are specified in the "Priest Compensation Policies." The two approved allowances are for housing and meals.
- d) All the Archdiocesan priests shall receive their monthly pension benefit from Massachusetts Mutual upon reaching age 70. If a priest has not retired, the parish or institution to which he is assigned will pay him the same amount as the stipend for temporary clergy assistance by the month. The assignment will continue to pay for the priest's health insurance, and retirement. No Social Security reimbursement will be paid to these priests. If for special circumstances a priest over age 70 would prefer alternative compensation arrangements, he must obtain approval from the Vicar for Clergy.
- e) Priests who assist in a parish on a temporary basis must be paid according to the Archdiocesan Remuneration Schedule for Temporary Clergy Help published each year by the Archdiocese.

2. Rationale

- a) Priest salaries are set by the Archbishop. A parish or Archdiocesan institution may neither raise nor lower this salary without the written approval of the Archbishop. Normally salary adjustments

are approved only if a priest is working part time or receiving a portion of his income from another source.

- b) Some parishes give a modest Christmas bonus to their staffs. If this is the practice, the priests assigned to the parish should receive the same bonus. A Bonus is an increase in salary. Therefore, aside from Christmas, no other bonus may be given.
- c) Allowances are generally taxable income unless their use is documented and qualifies for tax deduction. (See "Tax Issues Related to Clergy") Consequently, the policy avoids allowances as much as possible. It does permit meals to be provided for by an allowance. (See "Meals") It also provides for a housing allowance. (See "Housing")

3. Procedures

- a) Each year the Archdiocese sends the Priest Remuneration Schedule and the Remuneration Schedule for Temporary Clergy Help to parishes and institutions. Additional copies may be obtained from the Office for Clergy or the Director of Financial Services.
- b) The ranges for compensation are as follows:
 - 1) Range 1 - Pastors in the top third of the parishes ranked by the Sunday count and which have schools. Principals and the Pastoral Center department heads.
 - 2) Range 2 - Pastors in the top third of the parishes ranked by the Sunday count and without a school. Pastors in parishes in the middle third with a school. Teachers with five years teaching experience and office directors in the Pastoral Center.
 - 3) Range 3 - Pastors in the middle third of parishes ranked by Sunday count and without a school. Pastors in the lower third of parishes ranked by Sunday count with a school. Teachers with less than five years teaching experience. Priests working in the Pastoral Center who are not department heads or office directors.
 - 4) Range 4 - Pastors in the smallest third of parishes

ranked by Sunday count and without a school.

- 5) Range 5 - Parochial vicars and "senior priests" (priests who are close to or past retirement age and are working in a parish but not as pastor or administrator). After age 70 priests who receive their monthly assistance by the month.

The parish rankings are determined by the Priest Personnel Board based on the average five year Sunday count. The Priest Personnel Board shall determine the salary range for any priest whose position is not included in the above descriptions.

Any questions about the range into which a priest is placed should be referred to the Vicar for Clergy for determination.

- c) Salaries paid to religious should be made out to either the religious community or jointly to the priest and the religious community. If they are made out just to the priest, they are subject to taxes.
- d) Salary payments must be made by check or by Electronic Funds Transfer (EFT). They must also be recorded through ADP, the payroll service used by the Archdiocese of Portland and its parishes and schools.

B. HOUSING

1. Policy

- a) Parishes to which priests are assigned as pastors, administrators, parochial vicars or residents must provide them with adequate and furnished living quarters on or near parish grounds.
- b) The parishes also provide each priest with an additional housing allowance in the amount set by the Archdiocese and published in the annual Priest Remuneration Schedule. The parish may not change the amount determined by the Archdiocese.
- c) Priests assigned to a parish may be given permission by the Archbishop to live outside the parish house.

2. Rationale

- a) Canon Law obliges the pastor to reside in a parish house close to

the church. It allows, however, the local Ordinary to permit him to live elsewhere "provided there is a just cause and due provision is made for the performance of parochial functions."

- b) The additional allowance is to provide for housing related needs other than the basic ones provided by the parish.
- c) Archdiocesan clergy personnel policy also requires parochial vicars and "priests living in residence" to live in the parish house of the parish to which they are assigned unless the Archbishop gives them permission to live elsewhere.

3. Procedures

- a) Priests assigned in residence receive room and board in return for their assistance to the parish (sacramental ministry, covering the parish in the absence of the other priest(s), and the like).
- b) The Archdiocese describes adequate housing as follows:
 - i. Ideally this should be a house for the exclusive use of the priest or priests.
 - ii. As a minimum it should provide the following space:
 - a) A bedroom, study and bath for each priest.
 - b) A kitchen, laundry, living room, dining room and guest room which can be shared if there is more than one priest.
 - c) A carport or garage and storage.
 - d) Decent furnishings provided by the parish.
 - e) Kitchen appliances, cooking utensils and table settings.
 - f) Washer and dryer.
 - iii. If the clergy living quarters are part of a building used by others:

- a) The same spaces for the exclusive use of the priest(s) must be provided.
 - b) The living quarters must be adequately separated from the public space.
 - c) There must be a private outside entrance from the living quarters.
- iv. In addition to the living quarters, the parish is expected to provide the following services related to housing:
- a) Electricity, gas/oil, water/sewer, garbage, basic phone service (for cell phones, see “Reimbursements for Professional Expenses, Policy, #5), basic internet service and security when needed. The priest shall reimburse the parish for any personal long distance calls and a percentage of the internet for personal use.
 - b) Weekly cleaning.
 - c) Normal repairs and maintenance.
 - d) Landscape maintenance.
- v. The parish does not pay for any other housing expenses, e.g. newspapers, cable TV, a computer/laptop/tablet/e-reader, etc. in the rectory/home or dry cleaning are the responsibility of the priest. The housing allowance is given to cover the above expenses. Anything purchased with this allowance becomes the personal property of the priest.
- c) If the existing living quarters do not meet these standards, the parish is not required to upgrade them immediately. Adequate living quarters, however, must be a priority in the future planning of a parish, particularly when remodeling or construction is planned. The parish has the responsibility to regularly maintain and upgrade the living quarters.
 - d) If a priest has been given permission to live outside the parish house, the Vicar for Clergy will determine the financial responsibility of the parish. ***The parish Business Manager/Bookkeeper is to contact the Vicar for Clergy to obtain the***

current amount of parish responsibility. The amount will take into account any extra cost to the parish when the priest chooses to live in his own home and the parish cannot rent the residence provided by the parish for the priest's housing.

- e) The additional housing allowance may be taken either as a non-accountable allowance or as an accountable reimbursement allowance at the choice of the priest. The use of this allowance is at the priest's discretion.

C. MEALS

1. Policy

- a) Parishes to which priests are assigned as pastors, administrators, parochial vicars or residents must provide them with a food allowance in the amount set by the Archdiocese and published in the annual Priest Remuneration Schedule. The parish may not change the amount set by the Archdiocese.
- b) If some meals are provided by a cook, an amount will be deducted for each meal provided in accordance with the annual Priest Remuneration Schedule.
- c) If a priest in residence works outside the parish, the institution he works for will provide a portion of the allowance determined by the annual Priest Remuneration Schedule.

2. Rationale

- a) Meals have always been provided as part of the compensation for priests.
- b) The amount of the allowance is based on providing a main meal and two other meals six days a week for 46 weeks out of the year. It is also assumed that many priests eat out frequently when a cook is not provided by the parish.
- c) The amount paid by the institution employing a priest in special ministry is based on a noon meal five days a week for 46 weeks out of the year.

3. Procedures

- a) Each priest may take the full cash allowance in advance or he may submit grocery and restaurant bills for reimbursement up to the amount of the allowance. If he takes a full (non-accountable) cash allowance, any meals provided by a parish cook are deducted from the allowance. If he chooses to be paid by reimbursement, any meals provided by a parish cook should be included in the total amount up to which he may be reimbursed.
- b) If the priest takes the full allowance, he does not have to account for his meal expenses, but the parish must include the allowance on his W-2. (See "Tax Issues Related to Clergy", "Procedures")

D. TAX ISSUES RELATED TO CLERGY

1. Policy

- a) Diocesan priests are considered employees for income tax purposes.
- b) Religious priests are considered agents of their order and are, therefore, exempt from income tax.
- c) Diocesan priests are required to participate in the Social Security program.
- d) All priests are considered self-employed for Social Security tax purposes. Therefore, priests are responsible for paying the full self-employment tax. To assist priests in fulfilling this obligation, the Archdiocese provides a Social Security Reimbursement for all priests who participate in the Social Security program. This amount is added to the basic salary in the salary schedule.

2. Rationale

Payroll is to be processed and paid in accordance with Archdiocesan policies and federal and state laws. Given the unique tax structure for priests, specific procedures are outlined below to ensure compliance with the above policy statements.

3. Procedures

- a) Diocesan priests are to receive a W-2 at the end of the year from the parish or institution which pays them.

- b) W-2's for diocesan priests should include cash salary, taxable food allowance, Christmas bonuses, any personal usage of parish vehicles, and Mass stipends received and disbursed through a parish account. The value of housing and the housing allowance is not considered taxable income for federal or state income tax purposes.
- c) If a priest chooses to take his food allowance as a non-accountable allowance, it must be included in the priest's W-2.
- d) The parish does not include the housing allowance in the W-2. The individual priest is required to be able to document for the IRS that the allowance was used for housing. He is required by the IRS to add any portion not used for housing related purposes onto his 1040 form as additional income for that year.
- e) State and federal withholding of income taxes is optional; priests may either make quarterly estimated payments or have the parish withhold income tax from paychecks.
- f) If salaries are paid to the religious community or jointly to the priest and the religious community, no tax forms are to be filed by the parish (i.e., no W-2's or 1099's are filed).
- g) Diocesan priests, who participate in the Social Security program, and those religious priests whose religious communities participate in the Social Security program receive a Social Security reimbursement to offset the cost of participating in Social Security (see the Archdiocesan Priest Remuneration Scale). The Social Security Reimbursement approximates one half of the cost of participating in Social Security. As far as taxing authorities are concerned, this reimbursement represents additional salary subject to taxation.
- h) Withholding of Social Security for clergy and matching this amount similar to the procedure for lay employees is not allowed by law. Priests must make estimated payments quarterly of the full liability.
- i) Any additional questions concerning parish treatment of priest taxes should be directed to the Director of Financial Services.

E. FRINGE BENEFITS

1. Policy

- a) Diocesan priests are covered under the group health insurance plans for Archdiocesan employees. The parish or Archdiocesan institution to which a priest is assigned is responsible for the premiums. When a priest reaches 65 the parish or institution to which he is assigned also reimburses him for Medicare Part B. The priest is responsible for deductibles, copays and any other costs not paid by insurance.
- b) Religious priests or externs (priests incardinated in another diocese) have the option of having coverage under the Archdiocesan benefits plan or under the plan of his order or diocese. The parish or Archdiocesan institution to which the priest is assigned must pay the insurance premiums. The priest is responsible for deductibles, copays, and any other costs not paid by insurance.
- c) Diocesan and religious priests with diocesan appointments are eligible to participate in a wellness program through Providence Health and Services. The Archdiocese will bill the parish or institution to which he is assigned for reimbursement.
- d) Priests with Archdiocesan assignments are enrolled in a long-term disability policy. The parish or institution to which a priest is assigned is responsible for the premium.
- e) Priests may choose to participate in the Archdiocesan Section 125 Health Care Spending Account (Flexible Spending Account). If they elect to participate, the amount they choose to put into the 125 is deducted from their monthly salary. The parish or institution to which a priest is assigned pays the administration fee for the 125 plan.
- f) Every parish or institution to which a priest is assigned is responsible for his retirement plan contribution.
- g) Priests may participate in the TSA retirement program. If they elect to participate, the amount they choose to put into a TSA is deducted from their monthly salary.
- h) Priests are enrolled in a life insurance program. The parish or

institution to which a priest is assigned is billed for this as part of the benefits.

- i) The personal property of diocesan priests who live in a rectory, i.e. a building owned by the parish/archdiocese, is covered by Archdiocesan insurance. Priests are responsible for the deductible and losses in excess of the coverage. (In 2012 the deductible is \$100 and coverage is \$5,000.) It is recommended that additional “Renter Insurance” be purchased by the priest to cover loss in excess of the Archdiocesan insurance.
- j) Parishes and Archdiocesan institutions may provide only those fringe benefits included in Archdiocesan policy.
- k) Priests may not receive personal loans from parishes or Archdiocesan institutions.

2. Rationale

- a) Diocesan priests are covered under the same health insurance plan as lay employees. They are expected to pay personally whatever is not covered by the insurance. If uncovered medical expenses impose a financial burden, they should contact the Vicar for Clergy.
- b) The wellness program is meant to assist priests in having regular medical exams and developing a healthy lifestyle.
- c) Religious priests often move in and out of the Archdiocese. It is frequently advantageous to them to remain on their community plan.
- d) The Archdiocese maintains a pension plan for Archdiocesan clergy. In addition it provides for long-term nursing care after a priest's own resources are exhausted. Religious orders generally maintain a retirement plan for their priests.
- e) If a priest needs a personal loan because of financial difficulties, he should contact the Vicar for Clergy.

3. Procedures

- a) Parishes are billed for priests with a parish assignment on the Archdiocesan medical plan. If priests are on a different plan, the parish is billed directly by their religious community or diocese up to the amount of the premiums for the Archdiocesan medical plan.
- b) Priests age 65 or older who are on Medicare Part B should submit their bills for this coverage to the parish for reimbursement.
- c) Priests should submit the bill for the wellness program to the parish or institution to which they are assigned for reimbursement.
- d) Every parish is billed for priests' retirement. The billing for retirement includes: (1) current retirement premiums for the priests assigned to the parish; (2) a fixed percentage of the annual offertory income (2% in 1996) billed for past diocesan and religious priests' retirement liabilities. Archdiocesan institutions which have priests assigned to them are billed for current retirement premiums. For clarification of billings for Religious/Extern priests see the annual Priest Remuneration Schedule, section VII, C.
 - i. The Archdiocese collects from parishes and pays religious orders directly for religious in Archdiocesan assignments. Likewise, it pays other dioceses for externs in Archdiocesan assignments. If a priest from a religious order or an extern has expressed an interest to incardinate in the Archdiocese, the current retirement premiums are placed in a separate (e.g. escrow) account until such time as the priest is incardinated or not. If incardinated, the amount set aside will be placed in our Archdiocesan Mass Mutual account and if not incardinated, will be sent to the religious order or diocese to which he belongs.
- e) Priests' personal property insurance is included in the general property insurance billing to the parish.
- f) Questions concerning the Archdiocesan benefits for priests should be directed to the Employee Benefits Coordinator in the Archdiocesan Office of Human Resources. Priests who desire some assistance with financial planning for retirement should contact the Director of Financial Services.

F. REIMBURSEMENTS FOR PROFESSIONAL EXPENSES

1. Policy

- a) Parishes and Archdiocesan institutions to which diocesan or religious priests are assigned will reimburse priests for business mileage at the rate specified by the IRS; the Archdiocese notifies parishes annually of the adjusted rate. When a priest serves more than one parish or mission, the parish to which he travels to provide service is responsible for mileage reimbursement. Priests receive no additional reimbursements or allowances for auto expenses.
- b) Each diocesan or religious priest is eligible to be reimbursed for continuing education and retreat expenses up to a limit specified by the Archdiocese. A portion of this also specified by the Archdiocese may be used to purchase professional books and periodicals. The parish or Archdiocesan institution to which a priest is assigned is responsible for this reimbursement. (For current reimbursement limits see the annual Priests Remuneration Schedule, Section VIII).
- c) The parish is responsible for paying the stipend for the annual priests' retreat and other required clergy programs.
- d) Diocesan and religious priests are eligible for longer term educational sabbaticals. Payment for these is shared among the Archdiocese, the parish or Archdiocesan institution to which a priest is assigned and the priest himself according to Chapter XIII, Continuing Education. **(Since there are currently no Archdiocesan funds available to help cover sabbatical expenses, priests are encouraged to plan well ahead for a sabbatical and to apply through the Lilly Foundation for sabbatical funding. They are most generous.)**
- e) Parishes and Archdiocesan institutions are expected to provide equipment needed by the priest to fulfill his job. Any equipment purchased for the use of the priest by the parish or Archdiocesan institution remains the property of the parish or the institution. Because the priest usually keeps his cell phone when he is reassigned, it is expected that he pay for the equipment, with any contract attached, but is reimbursed by the parish or Archdiocesan institution for any business use of the phone.

- f) A parish or institution to which a diocesan or religious priest is assigned by the Archbishop is responsible for the priest's moving expenses up to an amount specified by the Archdiocese.

2. Rationale

- a) Priests are expected to own and maintain personal cars which are used both for personal and ministerial use. They are reimbursed for the ministerial use at the IRS rate. This prevents any tax liability for the priest.
- b) Priests are expected to remain current in theological disciplines and pastoral practices. They are also expected to maintain their spiritual development through an annual retreat and other spiritual programs. The accumulation of a previous year allotment allows the priest to attend a longer or more expensive continuing education program.
- c) Priests are also expected from time to time to do longer-term study. Applications for these longer-term sabbatical programs are made to the Continuing Education Board and approved by the Archbishop.
- d) Parishes are expected to provide the equipment necessary for the pastoral and administrative work of the priest. This equipment might include such items as a computer, as well as such things as liturgical books and vestments. It does not include clerical clothing. Whatever equipment the parish provides remains the property of the parish. Priests may also have personal property which they use in their pastoral work. It, of course, remains their personal property.
- e) A priest is required to move to wherever the Archbishop assigns him. The parish or institution which will benefit from his service is responsible for the move.

3. Procedures

- a) Priests must submit a mileage log for business miles. The parish or institution must reimburse them at the IRS rate for those miles. If a priest is assigned to more than one parish, when traveling between parishes, the parish to which he travels will reimburse the priest for business miles.
- b) Parishes should budget for the full amount allowed for priest's continuing education expenses. This money, however, may be used

only for reimbursement of expenses after receipts or bills are submitted by the priest. Any amount left unused at the end of the fiscal year does not carry over to the next year.

- c) A priest should inform the parish as far in advance as possible when he plans to take a continuing education sabbatical. The financial responsibility of the parish or institution will be determined by the Archbishop in accordance with clergy personnel policy and after consultation with the Continuing Education Director.
- d) Parishes are required to maintain an inventory of all equipment, including that used by the priest. It is advisable for priests also to maintain an inventory of their personal possessions in order to keep clear what belongs to them.
- e) The priest must submit invoices for moving expenses to the parish or institution to which he is being assigned for payment up to the limit established by the Archdiocese. The limit is included in the annual Priest Remuneration Schedule.

G. MASS STIPENDS, OFFERINGS, GIFTS

1. Policy

- a) Priests are entitled to keep Mass stipends for those Masses they celebrate. The standard stipend is determined by the Bishops of the Province, although individuals may give a larger offering if they desire.
- b) Offerings given at the occasion of the celebration of the sacraments and funerals belong to the parish unless the donor explicitly states the offering is a personal gift to the priest. If the Eucharist is celebrated, the priest may take a Mass stipend from the offering to the parish at the amount specified for Mass stipends by the Bishops of the Province.
- c) If a priest other than the parish priest presides and/or preaches at a funeral or a wedding the family may choose to give him a gift. If the priest does not receive a gift the parish is expected to pay the visiting priest following the Priest Remuneration Schedule for a Sunday Mass.
- d) Collections or offerings taken on All Souls Day or other special occasions belong to the parish.

- e) The parish may not give a priest a gift from parish funds. Gifts may be given to the priest by individual parishioners.

2. Rationale

- a) Universal church law entitles a priest to receive a stipend for the celebration of Mass. The Bishops of the Province are to determine the normal offering, which may be found in the annual Remuneration Schedule. People may give more than this or less if they desire. Priests may keep a stipend for only one Mass a day. The one exception is Christmas, when the priest may keep stipends for all three Masses celebrated. Pastors are required to celebrate Mass for the people of the parish on Sunday and holy days of obligation within the Archdiocese. If they celebrate a second Mass on those days, they may keep a Mass stipend.
- b) In accordance with Canon Law, offerings given in conjunction with the celebration of the sacraments or funerals belong to the parish unless the donors clearly state they wish the gift to go to the priest. The priest is entitled to take a Mass stipend if he has not already received a stipend for another Mass that day.
- c) No general collection may be taken from the parish for the benefit of an individual priest. This includes special collections taken up on All Souls Day, Mother's Day or at other times during the year, even when people specify individuals who will be remembered during the Masses. People may be encouraged to give individual offerings for Masses for the deceased during the month of November.
- d) Gifts may not be given to priests from parish funds. Although it may not be intended, they are in effect a bonus or increase in the priest's salary. A parish might encourage parishioners to give individual gifts at the time of a priest's 25th anniversary, when he leaves a parish or some other special occasion. These contributions, however, may not go through parish accounts and are not tax deductible.

3. Procedures

- a) If Mass stipends are received by the parish, the parish is required to keep a record of those offerings (amount and intention) and when the Masses are celebrated. If a parish has more Mass stipends than can be used in a reasonable period of time, it should

send some of them to the Chancellor at the Pastoral Center for timely distribution. When a person gives a donation for Masses, the number of Masses to be said must be calculated by the established rate unless the donor specifies otherwise.

- b) From time to time the parish may wish to explain the practice of giving Mass stipends in the bulletin.
- c) Parish marriage policies which are given to those preparing for marriage should 1) list any fees charged by the parish, e.g., cleaning fee, 2) explain that it is customary to give the parish an offering, but not required and 3) state that the couple is not expected to give the priest a gift.
- d) Funeral parlors should be instructed that offerings on the occasion of funerals should be made out to the parish and not the individual priest.
- e) Catechesis for parents and godparents on the Sacrament of Baptism should explain that an offering to the church is not required but if they wish to give an offering on this occasion, it goes to the parish.

H. PAID LEAVES

1. Policy:

- a) Priests receive one full and a half days off per week.
- b) Priests receive one month paid vacation per year. Normally vacation is taken within the fiscal year. International priests may accrue some or all of their vacation up to 2 months over a 3 year period for the purpose of traveling to their home country. However, vacation arrangements must be approved in advance by the pastor. If the priest is reassigned to another parish or institution before taking the accrued vacation, the parish where the priest was assigned will pay replacement cost for the accrued vacation now being used. The Vicar for Clergy should be informed of any vacation accrual. He will keep a record of the amount accrued.
- c) All diocesan priests are asked to attend the annual priest's retreat. Besides the time off with pay for the annual retreat, priests are entitled to an additional five paid days off a year for reflection and prayer.

- d) Priests are entitled to 14 paid days of professional leave a year for continuing education. Longer continuing education leaves are arranged through the Archdiocese.
- e) The parish or Archdiocesan institution to which a priest is assigned is responsible for the first two months of a long-term disability for medical or other reasons as follows:
 - i. Full salary.
 - ii. Housing and meals.
- f) If the priest is unable to live in the parish, the Archdiocese provides the housing, but the parish continues to pay the housing allowance and meals allowance.
- g) If the priest is in a residential program or hospital, the parish does not pay for meals and housing.
 - i. All benefits including retirement.
 - ii. All clergy replacement costs for the first two months and beyond.
- h) Priests who do ministerial work for which they are paid in addition to their Archdiocesan assignment must do it during their vacation or on days off. Otherwise such work must be done during an unpaid leave; or the priest must reimburse the parish for the cost of replacement assistance.

Normally a priest may not work outside of his assignment except on his day off or vacation. For the occasional wedding, funeral, etc. a parochial vicar should get permission from the pastor prior to accepting an invitation. If the parish must hire a replacement, he (or the couple, family, etc.) would be responsible for the cost of replacement. The same is true for a pastor or administrator.

For regular assistance in another parish, the parish will reimburse the parish of assignment at the current rate for temporary help (See the annual Remuneration Schedule).

To regularly work in an institution such as a school or social service the priest must first talk with the Vicar for Clergy and have the permission of the Archbishop. The Vicar for Clergy will

determine whether any adjustment in compensation is warranted. If there is a question, the priest should consult with the Vicar for Clergy for clarification.

2. Rationale:

- a) The *Clergy Personnel Manual* authorizes one and a half days a week off for clergy. Priests who are in residence should arrange with their pastor the weekly time off compatible with the duties of their principal assignment and the needs of the parish.
- b) Priests are entitled by Canon Law to one month's vacation. Because of the hardship and expense of traveling to many countries for vacation International priests may accumulate vacation time up to 2 months over a 3 year period for the purpose of traveling to their home country. The Vicar for Clergy should be informed of any vacation accrual. He will keep a record of the amount accrued.
- c) Priests are required to make an annual retreat. Diocesan priests are asked to attend the annual Archdiocesan priests' retreat. They are allowed to take an additional 5 days for a retreat or days of recollection to take care of their more individual spiritual needs.
- d) Priests are encouraged to continue their professional development. They may take up to fourteen days of paid leave for continuing education, including workshops, institutes, lectureship series, professional conventions, study programs, etc.
- e) If it is necessary for a priest to go on an extended sick leave, he should discuss this with the Archbishop or the Vicar for Clergy ahead of time. In emergencies he or, when he is unable, someone in the parish should notify the Archbishop or the Vicar for Clergy as soon as possible. Parishes provide salary and benefits for the first two months of sick leave. If the illness lasts longer, the diocese will provide these or the appropriate benefits.
- f) Sometimes priests do non-diocesan ministerial work, i.e., serve as reserve chaplains in the Armed Forces, teach at the seminary or in a university, serve as a paid chaplain for a hospital. They must receive the permission of the Archbishop before taking additional work. Because they are being compensated for this work, the parish or institution is not responsible to pay them for the days which they spend in the second ministry unless they work on days off or during vacation; or reimburse the parish for the cost of replacement.

3. Procedures:
 - a) Priests are to keep their own accounting of vacation days. Parochial vicars and priests working under supervisors should discuss the scheduling of their vacation with the pastor or supervisor. Priests are required to get their own replacements for the time they are on vacation. The parish or institution pays for the replacement.
 - b) When priests are on sick leave and unable to live in a parish house, the parish will be informed of the amount due for room and board during the first two months.
 - c) Parishes or institutions should contact the Office of Clergy for assistance in calculating reduction of pay for unpaid leave.

I. LONG-TERM DISABILITY

1. The parish provides for salary, housing, meals and benefits for the first two months. (See section H.1.e, "Paid Leaves, Policy" in this chapter.)
2. The Archdiocese pays the full salary, housing and housing allowance, meals and benefits for the second two months.
3. After four months, the Archdiocese provides the following:
 - a) 60% of the priests salary. (Unless this is provided by long-term disability insurance.)
 - b) Housing with the basic services listed in the "Priest Compensation Policies", "Housing", Procedure #2. No additional housing allowance is provided.
 - c) 60% of the meal allowance.
 - d) Full medical benefits and retirement.
 - e) If there are expenses related to medical care not covered by insurance which impose a serious financial burden on the priest, the Vicar for Clergy may approve the payment of some or all of these expenses.
4. Long-term disability does not apply to those who are permanently impaired from the exercise of ministry because of misconduct.

CHAPTER XVI EXTERN PRIESTS
AND INCARDINATION

I. PRIESTS SEEKING TO WORK IN THE ARCHDIOCESE

- A. The Vicar for Clergy shall assist in the process of preparing applicants for incardination into the Archdiocese. He shall also assist extern priests who seek a pastoral assignment in the Archdiocese, whether on a temporary basis or in preparation for eventual incardination. In both cases, he shall request and receive letters of recommendation and letter of good standing from the previous diocese or religious community and the requisite ecclesiastical permission from his Ordinary or Religious Superior.
- B. The applicant shall also be interviewed by the Vicar for Clergy who shall make a recommendation to the Priest Personnel Board and the Archbishop regarding his suitability for ministerial service in the Archdiocese.
- C. The Vicar for Clergy shall notify pastors and administrators (if appropriate) of the availability of the applicant for ministry and of his special skills, interests and goals. A written agreement shall be negotiated between the priest applicant and the host pastor or administrator which shall specify his job description, salary scale, living situation and other conditions. Upon approval of the agreement by the Vicar for Clergy, the priest may be assigned to the parish or special ministry on a temporary basis. The agreement shall be reviewed annually.
- D. No priest on temporary loan or seeking incardination shall be appointed pastor. In special circumstances, after consulting the Priest Personnel Board and the Area Vicar, the Archbishop may appoint such a priest as administrator of a parish. In such cases, the Vicar for Clergy, under direction of the Archbishop, shall negotiate the agreement.

II. PROCESS FOR INCARDINATION

- A. A priest wishing to incardinate in the Archdiocese shall present to the Vicar for Clergy a letter or decree from his Ordinary or Religious Superior granting permission to excardinate from his diocese or religious order and to seek incardination in the Archdiocese. The priest shall also put into writing, either to the Archbishop or the Vicar for Clergy, his intention to incardinate in the Archdiocese.
- B. The Archbishop, after consulting the Vicar for Clergy, shall accept or reject the petition. If accepted, a priest will ordinarily spend a three-year probationary period in an Archdiocesan assignment.
- C. During the three-year probationary period for incardination, a priest shall undergo

a full medical examination as well as a psychological evaluation. Both the medical report and the psychological report are to be sent to the Vicar for Clergy.

- D. The Vicar for Clergy shall consult on a regular basis with the priest's pastor or administrator, the Area Vicar, and others as needed, regarding the priest's capacity for ministry and his adjustment to the Archdiocese.
- E. At the end of the probationary period, the Vicar for Clergy shall make a full report to the Archbishop and to the Priest Personnel Board on the suitability of the priest for incardination. A recommendation regarding suitability shall be made to the Archbishop.

CHAPTER XVII
CONFLICT RESOLUTION

I. GENERAL POLICY

- A. Conciliation and reconciliation are the most appropriate forms of conflict resolution for the presbyterate.
- B. To that end the following processes are available.

II. CONFLICTS BETWEEN PASTORS AND PAROCHIAL VICARS OR DEACONS

- A. The relation between pastor and parochial vicar or deacon should be characterized by mutual respect, common accord and joint effort. They are in every way possible to share in the care of the people of their parish.
- B. Conflicts between pastors and parochial vicars or deacons in particular should be resolved in the spirit of the Gospel and with the objective of working through the problems themselves. To this end the following procedure is established.
 - 1. If conflicts arise between pastor and parochial vicar or deacon, the parties should try on their own initiative to work the conflict out together.
 - 2. Either party may contact the Vicar for Clergy if he feels there is no hope of working out the conflict without assistance.
 - 3. After talking with the party initiating the contact, the Vicar for Clergy shall contact the other party to hear his side.
 - 4. If, after talking to both parties, the Vicar for Clergy judges that they have made a reasonable effort to resolve the conflict, he shall ask a trained consultant to meet with them and assist them in resolving the conflict.
 - 5. If this intervention is unsuccessful, either or both parties may be reassigned. However, an evaluation of the causes of the conflict and the reasons for failure to resolve them shall be asked from the consultant and included in each person's personal file. Each party shall also have the right to place his own evaluation in the file.

CHAPTER XVIII CONFIDENTIALITY

I. POLICY OF CONFIDENTIALITY

- A. The dignity of each priest demands the discretion of the Priest Personnel Board, while at the same time, the spirit of brotherhood among the priests should be furthered by a policy of open communication. These two factors, discretion and open communication, necessitate a clear policy of confidentiality.
- B. Due to the process of consultation, total secrecy will not be possible concerning proposed assignments, but certainly various levels of confidentiality (ranging from absolute secrecy to discretion) can and must be observed. Priests should be aware also that all assignments are official only when made by the Archbishop and until that point they are only proposals. This awareness should encourage priests to be discreet about discussing proposed assignments and will aid in preserving a measure of confidentiality.

II. GENERAL NORMS REGARDING CONFIDENTIALITY

- A. The Archbishop, Auxiliary Bishop, Vicar for Clergy and members of the Priest Personnel Board are bound by professional secrecy and confidentiality in personnel matters.
- B. The Priest Personnel Board is bound to secrecy in the personal problems of the priests. The individual priest's natural right to privacy must be scrupulously respected.
- C. To assure a measure of confidentiality, during the process of consultation, the Priest Personnel Board will demand of its members the highest level of integrity and discretion. The priests consulted are expected to use the same kind of discretion.
- D. Except in the case of the priest immediately involved in the proposed assignment, the Priest Personnel Board members will not discuss the rationale of the assignment with other persons, but will be willing to listen to ideas and suggestions from others.
- E. The Priest Personnel Board members will not mention any specific name proposed for a given assignment to persons not directly involved, until the assignment is promulgated by the Archbishop.
- F. Personal problems, even of a public nature, will not be discussed by Board members with other persons.

- G. Priests who are on leave of absence deserve and will receive the same right of confidentiality.

III. SPECIFIC NORMS REGARDING CONFIDENTIALITY

In particular, strict confidentiality shall be maintained by the Vicar for Clergy and members of the Priest Personnel Board in the following matters:

- A. Consultation regarding personal leave and sick leave, or request for laicization.
- B. Consultation regarding alcohol and chemical dependency.
- C. Consultation regarding the reasons for administrative transfer.
- D. Consultation regarding the reasons for administrative resignation or removal and subsequent recourse.
- E. Consultation regarding the personal profile, evaluations and goals.
- F. Consultation regarding applicants for open positions in the Archdiocese.

IV. PERSONNEL FILES AND RECORDS

The following and only the following personnel files shall be maintained by the Archdiocese:

A. Permanent Files

The Vicar for Clergy Office shall maintain a permanent file for each priest in the Archdiocese.

1. This file, shall contain the priests standard biographical data and a listing of all his assignments.
2. This file will also contain: Sacramental Certificates, transcripts, evaluations, records of installations, appointment letters, press releases, Clergy Personnel Action forms, background check information, incardination documents, honors, awards, and special assignments. The individual priest may examine the material in his own permanent file upon request and in the presence of a member of the Vicar for Clergy Office

B. Vicar Files

1. The Vicar for Clergy Office shall maintain a confidential personnel file for each priest of the Archdiocese. Ordinarily, only the Archbishop, the Auxiliary

Bishops, the Chancellor and the Vicar for Clergy shall have access to the confidential files. The Vicar for Clergy may provide information from the Vicar Files to members of the Priest Personnel Board in specific cases and where such information is necessary for appropriate consultation. No copies of materials contained in the confidential vicar file may be made or given out without the authorization of the Archbishop. Personnel files are the property of the Archdiocese of Portland.

2. Letters and Statements of Complaint

It is understood that a complaint is not in itself necessarily an indication that a priest is not carrying out his ministry effectively and professionally. The complaint may, in fact, be a sign of the very opposite. Nevertheless, all complaints, whether they are made by letter, email or orally by telephone or in person and summarized by the Vicar for Clergy in writing, shall be handled as follows:

- a) Signed letters of complaint or concern or written summaries of complaints made in person or orally over the phone when the complainant identifies him/her self (giving name and address) shall be inserted in the file when the complainant agrees that the priest or deacon may read the letter or statement.

The cleric will be given the opportunity to challenge such material and may attach his own written response to the specific document should he choose to do so.

- b) When the sender of a signed letter of complaint does not wish his/her name to be made known to the priest, the letter without signature and references to the sender will be inserted into the file. For oral complaints by phone or in person when the complainant identifies himself/herself initially but does not wish his/her identity to be made known to the priest, a memorandum summarizing the complaint and indicating that the complainant did identify himself/herself but desires anonymity will be inserted into the file. The cleric will be given the opportunity to challenge the complaint in writing as above.
- c) Anonymous letters or calls of a serious nature shall be retained or recorded in summary form at the discretion of the Vicar for Clergy. If the complaint proves to be untrue, the Vicar for Clergy will attach a memo indicating the complaint was found to be false. The cleric will be given the opportunity to challenge the complaint in writing as above.

- d) The Vicar for Clergy in conjunction with the Archbishop and the Priest Personnel Board is responsible for carrying out the investigation of serious complaints made against clerics.

CHAPTER XIX
AMENDMENTS AND EVALUATION

I. AMENDMENTS

- A. The Priest Personnel Board is specifically charged to recommend appropriate additions or amendments to these Clergy Personnel Policies and Procedures. Other organizations or individuals may present recommendations for additions or amendments to the Priest Personnel Board for study and consultation.
- B. The Priest Personnel Board brings any proposed additions or amendments to the Presbyteral Council. After consideration, the Presbyteral Council shall refer these proposed changes to the Clergy Convocation for a vote. The proposed changes are then referred back to the Presbyteral Council who will then make a recommendation to the Archbishop for promulgation and implementation.
- C. Those priests shall be considered eligible to vote on additions or amendments to the Personnel Policies and Procedures who are priests of the Archdiocese in good standing and who are not retired or on an extended leave of absence.

II. EVALUATION

- A. These Personnel Policies and Procedures and their implementation shall be evaluated by the Presbyteral Council as needed.
- B. The Archbishop or the Clergy Personnel Board may ask that a change be considered at any time.

Clergy Personnel Manual Receipt and Acknowledgement Form

Name: _____ Date: _____

My signature below confirms I have received and read the *Clergy Personnel Manual* for the Archdiocese of Portland.

I understand the Archbishop, Vicar for Clergy and Clergy Personnel Board may amend these policies and procedures from time to time. If I have questions about these policies and procedures, any subsequent amendments, or a related matter not covered here, I will consult the Vicar for Clergy.

Clergy Signature: _____

Date signed: _____