



**ARCHDIOCESE OF AGAÑA**

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**PRIEST TRANSITION PERIOD CHECKLIST**

<b>Parish Name:</b>	<b>Location:</b>
<b>Priest Name:</b>	<b>Employee No.:</b>
<b>Transition Start Date:</b>	<b>Effective Date of Transfer:</b>

✓ <b>PATORAL MATTERS</b>	
	Sacramental records (Baptism, Weddings, Funerals, Confirmations are up to date and in good order)
	Parishioners Listing & Demographics
	Parish Pastoral Councils
	Parish Statistics
	Mass Schedules
	Parish Ministries
	Minutes of the Meeting (Pastoral Council & Ministries)
	Pastoral Commitments
	Worship Items
	Other Matters

✓ <b>ADMINISTRATIVE MATTERS</b>	
	Parsonage: walk through has occurred and any concerns addressed
	Parish Owned Vehicles
	Medical & Health Insurances of the Priest
	Independent contractors Arrangements
	Signed Contracts
	Pending Fund Raising Events
	Priest Personnel Action Form
	Keys to the church building(s), parsonage, vehicles
	Security Alarms Code
	Personnel Computer with password & security code
	Other Matters

✓ <b>FINANCIAL MATTERS</b>	
	Financial Report Updates
	Financial Budgets (past & present if available)
	Parish Finance Council Information
	Minutes of the Meeting - Parish Finance Council
	Bank records, checkbook(s), credit card(s), petty cash
	Updated signature card(s) for bank and financial accounts
	Delegation of Authority
	Fixed Asset Listing
	Receivables (Employees, Clergy & Others)
	Payables (Vendor & Others)
	Long-Term Obligations such as loans
	Strategic Plan in place if any
	Capital Projects On-Going & Pending
	Permanently Restricted & Temporary Restricted Funds
	Other Matters : _____

✓ <b>EMPLOYEE MATTERS</b>	
	Staff Work Schedules
	Staff Personnel Files
	Last Performance Evaluations
	Staff Payroll Information
	Employee Benefits carried over leave balances
	Other Matters

✓ <b>OTHERS</b>	
	Parish Files / record location & retentions procedure

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Received & Processed by: \_\_\_\_\_ Date: \_\_\_\_\_

## **GUIDELINES FOR TRANSITION PERIOD OF A PASTOR IN THE EVENT OF TRANSFER, RETIREMENT, DEATH, OR EXTENDED ILLNESS**

- A) The goal of the transition process is twofold: 1) to address the human needs of the priest involved and the parishioners during the transition period; and 2) to assure, as much as possible, continuity in the pastoral goals and priorities of the particular parish.
- B) The outgoing pastor is to appoint a “transition team” of about six members, composed of the other members of the parish team (associate pastor, lay ministers), plus some members of the parish pastoral council and finance committee. This committee will be formed soon after the change of pastors has been publicly announced and will finish its mandate after the incoming pastor has been canonically installed and the new parish pastoral council has been installed. The outgoing pastor will name the chairperson of this transition team and communicate this information to the Priest Personnel Office, providing an open line of communication with the parish and Chancery office other than the priest himself.
- C) A change of pastors is an opportune time to review certain aspects of the parish rectory responsibilities. The transition team will facilitate the following:
- i) the preparation of the farewell celebration and a recommendation of the parish gift to be offered, according to the archdiocesan guidelines;
  - ii) offering advise if requested, regarding the details of moving the personal belongings of the priest to his next assignment;
  - iii) assuring that the rectory is clean and ready to receive the incoming pastor. In some instances, there may be some consideration in shared responsibility and cost for such cleaning, e.i., shared between outgoing pastor and parish;
  - iv) assisting the outgoing pastor in updating the financial and spiritual records before the arrival of the incoming pastor;
  - v) contacting the incoming pastor before the pastoral move, in an effort to prepare the welcome celebrations and to open lines of communications; and
  - vi) meet with the incoming pastor to inform him of the particular priorities and concerns of parishioners.
- D) There is to be a meeting of outgoing and incoming pastors to discuss the following:
- i) the parish profiles;
  - ii) the staff, full-time and part-time, regarding job description [which should be in writing and on file], salary, appraisal reports, and general spirit of cooperation; and,
  - iii) the parish pastoral priorities and concerns.
- E) The archdiocesan finance officer will contact the outgoing pastor regarding the requisite of internal audit/review of parish financial records.
- F) Parishioners are to be dissuaded from petitioning the Archbishop and the Priest Personnel Board regarding the pastoral move.