

SERIES 1000

PASTORAL RESPONSIBILITIES OF PRIESTS IN THE ARCHDIOCESE OF SAN FRANCISCO

1100 PASTORAL MINISTRIES AND RESPONSIBILITIES

1110 Priests:

1111 Personal Spirituality: The priest is called in a special way to share his faith with others. He does this through his ministry of service to God's people. This ministry requires of the priest a vital spiritual life supported by his regular celebration of the Eucharist, recourse to the Sacrament of Reconciliation, personal and liturgical prayer, and utilizing those means of spiritual growth (e.g. spiritual direction, support groups, annual retreat etc. which experience has shown to be especially effective in sustaining the priest's life of faith.

1112 Continuing Formation: Realizing the continuing need to be informed of the needs of the people and the needs of the Church, he should participate in on-going priestly formation , in other educational programs, in private study. The priest is accountable to the archbishop, himself, to the people he serves, and to those with whom he works for being well informed. In collaboration with his parish and the Archdiocese the priest must take an appropriate amount of time to achieve this goal.

1113 Liturgical Responsibilities: The priest must demonstrate the willingness and ability: 1) to plan and to preside reverently at liturgical celebrations (e.g.- Baptism, Eucharist, Reconciliation, Matrimony and Anointing of the Sick) in accord with liturgical norms, and 2) to preach the Word of God effectively through well planned and well delivered homilies.

1114 Pastoral Responsibilities: In his service of the Church, the priest recognizes that the ministry of the Church reflects concern for all genuine human needs. He should demonstrate concern for the sick, the poor, the alienated, and the non-churched. Pastoral responsibility is demonstrated by active cooperation with those who are in lay leadership in the parish (Pastoral Council, Finance Committee, etc.) and willingness to further the development of lay leadership and ministry to help in the growing demands for spreading the Gospel in all areas of the parish. Pastoral responsibility may also require a willingness to engage in further study (e.g., language) so as to be able to serve special needs of particular groups. It may also call for cooperation with non-church organizations involved in specific areas of community development. Realizing that Archdiocesan agencies and persons are at the service of the parishes, the priest demonstrates a willingness to seek help and advice from these resources to achieve pastoral goals and objectives.

1115 Faith Formation: Since the priest is considered a teacher and overseer in the presentation of the practice and content of the Catholic faith, he should demonstrate interest in all areas of faith formation, including the RCIA, Catholic schools, children, youth and adults. As a spiritual leader in the community, he demonstrates his commitment by his interest and presence. This commitment and cooperation are extended to all those who are engaged in faith formation at whatever level, whether local or archdiocesan.

1116 Archdiocesan Support: As Archdiocesan goals and programs are developed to meet the needs of the Church; the priest should demonstrate leadership through his willingness to work with Archdiocesan agencies, participate in deanery meetings and activities, and assist in Archdiocesan efforts to achieve goals.

1117 Vocations: Mindful of the universal call to holiness, the priest will cooperate with the Vocation Director in fostering programs and providing opportunities for prayer which assist the faithful in discerning their sacred calling in life. The example of his own life and his willingness to share his own vocation story will assist others in their prayerful discernment of a Divine Call to Priesthood and Religious Life. The priest is encouraged to speak often about vocations in his homilies and in his visits to parish school, religious education classes and youth ministry programs. The priest is called upon to invite young people to consider the possibility of a priestly or religious vocation and to be challenged to answer the Lord's call to service. The witness of priestly fraternity can be an important factor in promoting vocations

1118 Self Evaluation: The priest is encouraged to evaluate his spiritual, psychological and ministerial effectiveness through regular retreats, spiritual direction, support group attendance and other self-evaluation instruments.

1119 Archdiocesan Evaluation: To aid the priest in the self evaluation, the Archdiocese shall provide a structure of evaluation for all priests serving in the Archdiocese of San Francisco.

1120 Pastors:

1121 Each parish in the Archdiocese will ordinarily be staffed by a resident pastor. The pastor is the proper shepherd of the parish who exercises his pastoral care of the people under the authority of and in communion with the Archbishop, whose ministry he is called to share. He further fulfills the duties of teaching, sanctifying and guiding with the collaboration and the cooperation of parochial vicars, deacons, religious, parish managers, lay pastoral associates and members of the Christian faithful. (Canon 519)

1122 Qualifications for the Office of Pastor: In addition to the qualifications mentioned above for all priests, pastors are expected to be people of:

122.1 Sound doctrine, integrity of morals, zeal for souls, and other virtues. (Canon 521.2)

1122.2 Successful experience in pastoral service to the Church in various capacities within the Archdiocese;

1122.3 Administrative and leadership abilities shown in previous assignments, especially the ability to organize and supervise parish work, to work collaboratively with other priests, religious, the parish manager, staff and the laity of a parish, to accept responsibility for property management, financial matters and human resources.

1130 Parochial Vicars:

1131 Parishes which have been identified as requiring the service of more than one priest on a full-time basis will, ordinarily, be staffed with parochial vicar(s).

1132 The parochial vicar is assigned by the Archbishop to be a co-worker with the pastor and under his pastoral leadership. Normally, the parochial vicar is assigned to assist in fulfilling the entire pastoral ministry on behalf of the entire parish. He is to consult with the pastor on planned or existing programs so that both of them through their combined efforts can provide for the pastoral care of the parish for which they are responsible.

1133 Before the Archbishop makes an assignment official, the pastor and the parochial vicar should discuss and agree on a description of their roles in a parish, by identifying areas of collaboration and responsibility.

1134 At the time of a visitation by the dean, the pastor and the parochial vicar should meet together with the dean to review these areas and make any necessary adjustment.

1140 The Priest In Non-Parochial Ministry:

1141 A priest assigned to a pastoral responsibility which has as its aim the service of the People of God without reference to a particular territory is said to be in non-parochial ministry.

1150 The Priest In Residence:

1151 The primary responsibility of the priest in residence in a parish is to his non-parochial ministry. However, by virtue of his residence in a parish the priest should be sensitive to parish structure and relationships, while the pastor, parishioners, and staff should always be sensitive to the non-parochial ministry of the priest in residence.

1152 Prior to coming to live in the rectory the resident priest and the pastor should mutually determine what responsibilities the man in residence shall have in the parish. The pastor is to consult with the parochial vicar and the agreed upon responsibilities should be occasionally reviewed.

1152.1 Normally the priest in residence will celebrate Eucharist and preach on Sundays.

1200 WORKING AND LIVING RELATIONSHIPS WITHIN THE RECTORY

1210 Introduction:

In all ministerial and living situations, the ultimate norm guiding the relationship between priests is service to the mission of the Church in fraternal priestly charity. The following guidelines are presented to assist priests working and living together in the fulfillment of their responsibilities to the people they serve, to their staff, and to each other. In order to respect the individual and personal needs of priests, it is urged that whenever possible work space be separate from living space.

The directives of # 1340 – “Guidelines with Regard to Ministry with Minors”, #1350 – “Guidelines with Regard to Pastoral Counseling” and #1360 – “A Code of Ethics for Those Involved in the Ministry of the Catholic Church” must be followed.

1220 Office Policies And Relationship With Staff Personnel:

The following are presented as guidelines for parish office policies and relationship with staff personnel. They should be discussed carefully by the pastor and the parochial vicar.

1221 Each priest shall ordinarily have access to a suitable room for counseling and private instructions. This room should be distinct from the living quarters of the priest. This room should be such as to provide confidentiality at all times. See #1350 – “Guidelines with Regard to Pastoral Counseling”

1222 The rectory office telephone ordinarily should be answered by a member of the office staff. After hours an answering service or answering machine is recommended. Current technology (voice mail, internet, cellular phone, pager or call forwarding) provides the opportunity to be available for emergencies without a priest being in the rectory. Every effort should be made to respond to important calls.

1223 There should normally be a secretary in the parish to handle those secretarial tasks that need to be done. The parish secretary shall be available within reason to all the priests of the parish to carry out the secretarial tasks necessary for the work of the parish.

1224 for effective ministry each priest in the rectory should have access to the parish files, record books, and equipment.

1225 When a parochial vicar is assigned to the parish, the pastor should inform him of the areas of responsibility of all members of the parish office staff. From time to time the pastor and parochial vicar should discuss these areas of responsibilities so that they can, if necessary, be modified for the common good of the parish. When there is a change of pastors, the job descriptions of all members of the office staff in written form should be given to the new pastor.

1226 The priests should adhere to all agreed upon office procedures.

1227 Priests should always show courtesy and consideration to parish staff and personnel.

1230 **Rectory and Living Quarters:**

The following are presented as guidelines for living in a rectory and should be agreed upon by the pastor and the parochial vicar:

1231 The rectory is the property of the Archdiocese. It is the common home for the priests assigned to the parish by the Archbishop. There must be mutual respect for the priestly lifestyle of each individual as well as his right to privacy.

1232 Each priest has the right to receive guests and friends into his personal living quarters, always respecting the privacy of other members of the household and adhering to the directives of # 1340 – “Guidelines with Regard to Ministry with Minors”, #1350 – “Guidelines with Regard to Pastoral Counseling” and #1360 – “A Code of Ethics for Those Involved in the Ministry of the Catholic Church”.

1233 The living quarters of the rectory shall be open only to those persons whom the resident priests wish to visit him. Parishioners and staff members shall not have the run of the private living or common quarters of the clergy.

1234 The rectory is primarily the home of the priests and secondarily the office of the parish. While there should be respect and sensitivity shown to the non-clerical members of the household (e.g., cooks, housekeepers, secretaries, etc.), the above priorities should always be maintained.

1235 A common lounge or sitting room for all the priests of the house is recommended for the purpose of fostering fuller community and common prayer. Ideally this room should be the priests' living room and normally it should not be used for parish meetings unless all priests agree. When and if this room is used for a parish meeting, the priest scheduling the meeting should be sensitive to the other priests' needs.

1236 Personal household pets should not infringe upon the privacy or well-being of other priests in the rectory. In this regard, care must be taken that the comfort of other priests and the accessibility of parishioners to the rectory are respected.

1237 in the exercise of his priestly function, each priest is expected to wear appropriate clerical attire.

1240 **Policy of Alternate Residence of Priests:**

1241 Recognizing that the ordinary living situation for priests in the Archdiocese of San Francisco is traditional rectory living, that is, priests serving a particular parish or non-parochial ministry live together in one home, this policy provides the following options:

1241.1 Pastors living alone in parishes may agree to live together in one central location.

1241.2 Pastors, parochial vicars and other priests serving different parishes or ministries may live together in a common house.

1241.3 Priests in any parish or ministry may live alone outside the rectory in exceptional circumstances. This policy is implemented according to the provisions of Canon 533 #1 and 550 #1 .

1242 Priests desiring to choose alternate residence should follow this procedure:

1242.1 The proposed model must be thoroughly and sensitively discussed with members of the pastoral council (or consultative body of the parish/ministry) to ascertain the financial feasibility of the proposal.

1242.2 The proposed model should be submitted in writing to the Archbishop.

1242.3 The Archbishop will make his response in writing.

1243 At the time of the visitation by the dean, the pastor and the parochial vicar should come together with the dean, review the areas of their responsibilities and make any necessary adjustments.

1300 **POLICY ON SEXUAL MISCONDUCT BY CLERGY**

Introduction

The Archdiocese of San Francisco recognizes that sexual misconduct by clergy constitutes one of the most serious breaches of trust in human relationships, and that it can have devastating

consequences for the victim and his or her family, for the Church community at large, for the great majority of priests who serve the Church faithfully, and for the priest or deacon involved.

In situations involving accusations of sexual misconduct by a priest or deacon, the Archbishop is the shepherd and advocate of all parties. He must seek the good of all. This good involves providing a full and fair hearing both for those who complain of misconduct and for clergy accused of such misconduct. The good of all demands that the Archbishop appoint clergy who he believes will minister properly and will not sexually abuse those to whom he ministers. It also demands that clergy be protected against false accusations of sexual misconduct.

This policy is to be considered as an amplification of and a supplement to the –Archdiocese of San Francisco Policies and Procedures regarding Child Abuse and Harassment (April 2001, revised March 31, 2003)

1310 Policy:

It is the policy of the Archdiocese that sexual misconduct by clergy is a most serious abuse of trust and will not be tolerated. The Archbishop has the responsibility to the people of God to appoint priests and deacons to positions of trust only if he believes that they will be able to serve properly the people entrusted to their pastoral care.

1310.1 In dealing with issues of sexual misconduct involving clergy, the Archdiocese will:

- **Treat all allegations of sexual misconduct seriously and never deal with a problem of sexual misconduct on the part of a priest or deacon by simply providing him with another ministerial assignment;**
- **Cooperate fully with civil reporting procedures governing sexual misconduct, specifically as stated in Section II.A. of the Addendum to the Archdiocese of San Francisco Policies and Procedures regarding Child Abuse and Harassment;**
- **Comply with California State Law which provides reporting requirements for child abuse whether sexual abuse, physical non-accidental injury or neglect. Archdiocesan personnel will comply with those requirements promptly and exactly as required by law. These reports must be made to Child Protective Services or local law enforcement. In the case of elder abuse: whether sexual abuse, physical non-accidental injury or neglect, financial abuse and/or psychological abuse, reports must be made to Adult Protective Services;**
- **Educate clergy and people about the problem of sexual abuse and maintain screening procedures and educational policies on this subject for those in ministry and those training for the ordained ministry;**

The Archdiocese acts in the belief that a true solution to a situation involving sexual abuse can proceed only from finding healing for victims of abuse, ensuring that

priests and deacons in ministry will not be a danger to minors or adults, and providing appropriate assistance to victims, as well as to those who commit abuse.

The Archdiocese maintains an Office of Child and Youth Protection (OCYP) that includes a “Victim Assistance Coordinator (VAC)”. The VAC facilitates outreach to every person who has been a victim of sexual abuse as a minor by anyone acting in the name of the Church. Outreach includes arranging for counseling, spiritual assistance as well as support services. The Office of Child and Youth Protection oversees the Archdiocese’s Safe Environment Program.

The Archdiocese maintains an Independent Review Board. The Review Board is an advisory board composed of appointed individuals not in the employ of the Archdiocese, except for a pastor as required by the *Essential Norms for Archdiocesan /Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons* . Possessing a variety of perspectives on, and experience in, dealing with sexual abuse, the Archdiocesan Review Board advises the Archbishop in his assessment of allegations of sexual abuse of minors and in his determinations of suitability for ministry. An independent investigator, accountable to the Board, shall conduct the fact gathering.

In investigating allegations of sexual misconduct by clergy, the Archdiocese will ensure that persons who complain of sexual abuse and the priest or deacon accused of sexual abuse receive a full and fair hearing, and that those who have been victimized will receive appropriate assistance in coping with their trauma and suffering.

1320 Procedures for the investigation and response to allegations of sexual misconduct by clergy:

1320.1 Archdiocesan Response to Victims

The Archdiocese reaches out to victims of sexual misconduct and sexual abuse and most especially to children and to their families, to assist them in a pastoral way. This pastoral response will involve working with the survivor/victim so that they might receive help that is acceptable to them and adequate to their needs.

Initial action involves receipt of a complaint of sexual misconduct and/or abuse by the Victim Assistance Coordinator (VAC) as set forth in the Archdiocesan Policy.

The Pastoral Outreach Coordinator aids in the immediate and continuing pastoral care of the survivor/victim. The Archdiocese offers the survivor/victim and, as appropriate, his or her family, therapeutic intervention, spiritual direction and assistance according to standard procedures during the investigatory process.

The right to privacy and to a good reputation of all parties associated with the incident under investigation, most especially the victim and the accused cleric, must

be protected. (*Norm 6; CIC c. 1717, §2*).

1320.2 Archdiocesan Action Involving Clergy against Whom an Allegation(s) Has Been Made - General Procedures

A preliminary investigation in harmony with canon law will be initiated and conducted promptly and objectively. If a clergyman wishes to suspend his participation in the preliminary investigation and any subsequent canonical tribunal process until after the conclusion of any pending investigation/trial by the civil authorities, he may do so subject to an immediate written acknowledgement that in the interim, he will remain on administrative leave and will not be permitted to publicly exercise ministry.

The Independent Review Board assesses the allegations of sexual abuse/misconduct in order to advise the Archbishop on whether or not the allegation(s) appears to be credible.

Anonymous complaints are dismissed in the absence of accompanying firm, and/or readily verifiable, facts.

A priest or deacon will be apprised by the Archbishop or the Vicar for Clergy that an allegation of sexual abuse has been made against him. The Investigator will then schedule a meeting with the priest or deacon to review the entire matter and allow the priest or deacon the opportunity to respond to the allegation.

During the preliminary canonical investigation, the priest or deacon will be given the full report of the alleged abuse, as well as the name(s) of those making the complaint(s). The priest or deacon will be invited to ask questions, offer his response to the allegation(s), and present his version of the events in question. The results of the Preliminary Investigation will dictate further appropriate actions.

Every person who makes an allegation will be informed of the action taken by the Archdiocese after the priest or deacon responds.

1320.3 *The Essential Norms for Archdiocesan /Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests and Deacons:*

In every case involving canonical penalties, the processes provided for in canon law must be observed, and the various provisions of canon law must be considered (cf. *Canonical Delicts Involving Sexual Misconduct and Dismissal from the Clerical State*, 1995; Letter from the Congregation for the Doctrine of the Faith, May 18, 2001). Unless the Congregation for the Doctrine of the Faith, having been notified, calls the case to itself because of special circumstances, it will direct the Archdiocesan bishop/eparch how to proceed (Article 13, "Procedural Norms" for *Motu proprio Sacramentorum sanctitatis tutela*, AAS, 93, 2001, p. 787). If the case would otherwise be barred by prescription, because sexual abuse of a minor is a grave offense, the bishop/eparch shall apply to the Congregation for the Doctrine of the Faith for a

dispensation from the prescription, while indicating appropriate pastoral reasons. For the sake of due process, the accused is to be encouraged to retain the assistance of civil and canonical counsel. When necessary, the diocese/eparchy will supply canonical counsel to a priest. The provisions of CIC, canon 1722, or CCEO, canon 1473, shall be implemented during the pendency of the penal process. ²

1320.4 In cases of denial of the allegation(s) by the priest or deacon: In instances where the priest or deacon denies the allegation(s) and upon canonical investigation, the allegation remains credible, he will ordinarily be asked to agree to undergo a professional psychiatric evaluation, and to release the results of the evaluation to the Archbishop and the Vicar for Clergy.

This evaluation is designed to serve as a professional psychological assessment through interview and testing to identify problematic areas that may be present in the priest's or deacon's life and to make recommendations on how to proceed.

The Diocese will determine what professional person or institution will be entrusted with the task of conducting the evaluation. Should the priest or deacon disagree with the results of the evaluation, he has the right to consult another agreed-upon professional for a second opinion.

After the evaluation has taken place, a full report of the allegation(s) and the priest's or deacon's response will be given to the Archbishop. If the truth of the allegation(s) has been established, or the case is so serious as to warrant residential treatment or resignation from office or the canonical removal of a priest or deacon from his assignment, the Archbishop will meet personally with him following receipt of the evaluation report. The priest or deacon may bring a friend or advisor to this meeting.

The goal of this meeting between the Archbishop and the priest or deacon is to arrive at a mutual agreement on the appropriate response and treatment.

If the priest or deacon refuses to undertake such an evaluation and the evidence is such that the Archbishop must act as envisioned by canon 1718, the Bishop initiates the canonical process deemed most appropriate to protect the Christian community.

1320.5 In cases of admission of the allegations by the priest or deacon: If the priest or deacon admits to the allegation(s) in the case of sexual misconduct involving an adult, he will be asked to resign from his office and/or to agree to limitations on or withdrawal of his faculties. In the case of sexual misconduct involving a minor (for a fuller treatment of this, see page 7, below), the priest's/deacon's faculties will be withdrawn and the cleric will not be allowed to function in the future. Appropriate help will be offered to him, usually in the form of therapy and spiritual direction.

A record of the complaint, the admission and other determinations made will be maintained in accord with the requirements of canon 489.

1320.6 Information provided to the Parish Community and the Archdiocesan Presbyterate:

The Archdiocese adheres to a communications policy that reflects a commitment to transparency and openness. Within the confines of respect for privacy and the reputation of the individuals involved, the Archdiocese will deal as openly as possible with members of the community. This is especially so with regard to assisting and supporting parish communities directly affected by ministerial misconduct involving minors.

1320.7 The following possibilities exist for the short and long-term future of a priest or deacon who has admitted or been found to be guilty of sexual misconduct:

1320.71 In cases involving sexual abuse of a minor, there is no possibility that the priest or deacon will be returned to ministry, as directed by the *Essential Norms*, 8. In these cases, canon law permits for the priest or deacon to request a dispensation from the obligation of holy orders, and also permits a request by the Archbishop for dismissal from the clerical state even without the consent of the priest or deacon. If the penalty of dismissal from the clerical state has not been applied, if the priest or deacon has not requested a dispensation from the obligation of Holy Orders, the offender must lead a life of prayer and penance. He will not be permitted to celebrate Mass publicly or to administer the sacraments. He is to be instructed not to wear clerical garb, or to present himself publicly as a priest.

1320.72 In other cases not involving minors, the decision to permit a priest or deacon to return to active ministry must take into account the nature and seriousness of the misconduct, the progress in treatment, positive signs of continuing recovery, the need to prevent a relapse into abusive behaviors, and the danger of scandal.

1320.8 In deciding whether to permit a return to active ministry, the Archbishop may seek advice from the Archdiocesan Review Board and from experts in the field. There are a number of possibilities:

**1320.81 Return to ministry with restrictions and follow-up program:
The priest's or deacon's immediate supervisor will be fully informed of his background and present situation. Appropriate supervision will be provided to all priests and deacons who are guilty of sexual misconduct.**

1320.82 Three to five years outside active ministry with a possibility for return:

From the very beginning, the hope of both the priest or deacon and the Archdiocese is that some form of ministry can be restored and efforts will be

made during the leave to prepare for that possible return. Any return will likewise involve appropriate restrictions and an aftercare program. The purpose of this program is to allow the priest or deacon to demonstrate continuing and progressive signs of recovery.

1320.83 Three to five years outside active ministry with the understanding that there is little chance of return:

In this situation, a new assessment is completed, should the priest or deacon in question petition for reinstatement to active ministry.

1320.9 If there is no possibility of return to ministry such as in all cases involving minors, the Archdiocese will assist the priest or deacon to petition for laicization. Should the priest or deacon be unwilling to submit such a petition, the Archdiocese will initiate appropriate canonical procedures to preclude him from any active ministry, up to and including laicization.

1330 – Prevention for the future:

Precautions Clergy Need to Take:

Clergy can and should develop a good, appropriate, and healthy rapport with minors. However, they must also avoid the kind of contact with minors that could raise questions or lead to negative comment on the part of reasonable people. Therefore, the Archbishop has established the following regulations:

Standard of conduct for those working with children and young people.

Introduction

The following Policy is applicable to all persons employed by or volunteering in any of the parishes and institutions of the Archdiocese of San Francisco. So that it is clear who must be aware of the contents of this document, the addresses include, but are not limited to, priests, religious (men and women), deacons, pastoral coordinators, school/program administrators, teachers, catechists, youth ministers, support staff, custodial staff, coaches, school program volunteers, seminarians serving in internships, and lay theology students.

The Policy has been developed to help create a safe, appropriate and Christian environment for minors and their relationship with adults involved in Church ministry. These child-specific standards are designed to serve as a supplement to the sexual boundary guidelines/code of ethics applicable to all those involved in the ministry of the Catholic Church (whether with minors or adults) that are set forth in the Archdiocese of San Francisco's *Policies and Procedures Regarding Child Abuse and Harassment*.

1340 Guidelines with Regard to ministry with minors:

1340.1 Any and all involvement with minors (i.e. individuals under the age of 18) is to be approached from the premise that minors should always be viewed -- whether

in a social or ministerial situation – as restricted individuals; that is, they are not independent. Wherever they are and whatever they do is to be with the explicit knowledge and consent of their parents and guardians. They are subject to specific civil laws in the State of California, which may prohibit certain activities. They are not adults and are not permitted unfettered decision.

1340.2 Whenever possible (see Nos. 3,4, 5 and 6 below) adults must avoid situations which will place them in a position to be alone with a minor in the rectory, school, or in a closed room. The only exception is the Sacrament of Reconciliation.

1340.3 In meeting and/or pastoral counseling situations involving a minor, excluding Sacrament of Reconciliation, the presence or proximity of another adult is encouraged. However, in those situations where the presence of another adult is not usual or practical (e.g., ~~piano~~, disciplinary meeting with an administrator, etc.), another adult should be informed that the meeting is taking place. The meeting place should be accessible and visible, with the door where the meeting is taking place left ajar, unless there is a clear window built into the door.

1340.4 The Sacrament of Reconciliation is to be celebrated in a place so designed for that purposes: reconciliation chapel or confessional.

1340.5 An unaccompanied minor is allowed only in the professional section of the rectory or parish center, never in the living quarters. Minors age 16 and over are permitted to work in the rectory when there would normally be at least two adults present, i.e., two persons over 21 years of age.

1340.6 At least two adults are to be present when a group of minors engages in organized events or sports activities, save for unforeseen circumstances such as the sudden illness of the ~~assistant~~ coach (though in such cases attempts should be made to secure the presence of a parent of one of the team members).

1340.7 Adults are to avoid being the only adult in a bathroom, shower room, locker room, or other dressing areas whenever minors are using such facilities.

1340.8 Youth trips of any kind must have a minimum of two adult chaperones, at least one of whom should be of the same sex as the young people. Larger groups must have at least one adult chaperone for every eight minors.

1340.9 While on trips or program activities, the adults, as well as the minors, may not use alcohol or controlled substances. However, with the approval of the pastor or principal, modest alcohol consumption by adult workers and parents of children is acceptable at events such as end-of-season team parties, etc.

1340.10 While on youth trips, clergy or lay leaders are never to stay alone overnight in the same motel/hotel room with a minor or minors, with the exception of a lay leader staying in the same room with his/her own child.

1340.11 The sacristy door is always to be open whenever minors are present within the sacristy.

1340.12 Comments of a sexual nature are not to be made to any minor except in response to specific classroom questions from a minor.

1340.13 Topics or vocabulary, such as profanity, cursing, or vulgar humor, which could not comfortably be used in the presence of parish/school administrators, parents/guardians, or another adult, shall not be used in the presence of a minor/minors.

1340.14 Adults are absolutely prohibited from serving or supplying alcohol, tobacco products, controlled substances, or pornographic or other inappropriate reading materials to minors.

1340.15 Audiovisual, Internet, music, and printed resources used in programs must be screened prior to use to ensure their appropriateness for the participants. It is never appropriate to use an “R”-rated movie, or movies rated with an even stronger designation, save for use of Archdiocesan-approved, age-appropriate films or film excerpts. Music lyrics should also be reviewed to ensure appropriateness.

1340.16 Careful boundaries concerning physical contact with minors must be observed at all times and such contact should only occur under public circumstances. Prudent discretion and respect must be shown before touching another person in any way. An adult should not assume that a child is comfortable with an adult-initiated hug or embrace, and, in any event, special care should be taken to avoid incidental contact, unintended or otherwise, with or in the vicinity of a child’s genital areas. If the child initiates physical contact, such as a hug, an appropriate limited response is proper.

1340.17 Adults must refrain from giving regular and/or expensive gifts to children and young people without prior approval from the parents or guardian and the pastor or administrator.

1340.18 It is never appropriate to impose “secrecy” on children and young people vis-à-vis their parents, police, etc. (e.g. under threat of physical harm, “punishment by God”, etc.).

1340.19 Clear violations of these standards, as well as any sexual misconduct, must be reported immediately to the appropriate parish, Archdiocesan and/or civil authorities in accordance with civil law and Archdiocesan policy.

1350 - Guidelines with regard to Pastoral Counseling:

1350.1 Pastoral counseling must take place only in the professional portion of a rectory or parish facility, never in the living quarters.

1350.2 Offices or classrooms used for pastoral counseling must have a window in the door, or the door is to be left ajar during the counseling session.

1350.3 Another adult must be in close proximity during any counseling session.

1350.4 Unless the subject matter precludes their presence and/or knowledge, parents or guardians of minors should be made aware of the counseling session.

1350.5 A referral for professional assistance is encouraged if counseling is expected to extend beyond two or three sessions with a minor. Evaluation of the situation should be made with the parents or guardians.

1350.6 The counselor is responsible to recognize any personal/physical attraction to or from a client. In such a situation, the client should be immediately referred to another qualified adult or licensed professional.

1360 - A Code of Ethics for Those Involved in the Ministry of the Catholic Church:

(As set forth in National Federation for Catholic Youth Ministry Website 2001, citing Richard M. Gula, S.S., *Ethics in Pastoral Ministry*, Paulist Press, 1995, pp. 149-151)

- We have a responsibility to witness in all relationships the chastity appropriate to our state in life, whether celibate, married, or single.
- We must avoid any covert or overt sexual behaviors with those for whom we have a professional responsibility. This includes covert or overt seductive speech or gestures as well as physical contact that sexually abuses, exploits, or harasses another person.
- We are to provide a safe place for young people where they can be assured that sexual boundaries will not be violated.
- We should be aware of our own and another's vulnerability in regard to sexuality, especially when working alone with another.
- We bear the greater burden of responsibility for maintaining sexual boundaries in a pastoral relationship, for we hold greater power.
- We must not initiate sexual behavior, and must refuse it even when another invites or consents to it.

- We must give preference to the perspective and judgment of those who are vulnerable and dependent on us in order to determine whether touching would be an appropriate expression of pastoral care.
- We must show prudent discretion before touching another person, since we cannot control how physical touch will be received. That is, we are to take into account how age, gender, race, ethnic background, emotional condition, prior experience, and present life situation all affect how our touching may be received and interpreted.
- We should become familiar with the dynamics of transference and counter transference, which can make us vulnerable to violating sexual boundaries.
- We strive for greater self-awareness in order to recognize the sexual dynamics at work for us in pastoral relationships and to heed the warning signs in our lives, which indicate when we are approaching boundary violations.
- We should satisfy our needs for affection, intimacy, attraction, and affirmation outside the pastoral relationship.
- We should seek supervision or other professional help to remain focused on our professional responsibilities and to hold firm to the sexual boundaries of the pastoral relationship.
- We must report clear violations of sexual conduct to the appropriate ecclesial and civil authorities (as referenced in *Archdiocese of San Francisco Policies and Procedures Regarding Child Abuse and Sex Harassment*), and then do what we can to see that justice is done for the victim, the offender, and the community from which the victim and minister come.
- We must intervene when there is evidence of the abuse of children, the elderly, or the disabled. When it is necessary to avert a serious threat of harm to another, justice requires that we make a reasonable attempt to elicit voluntary disclosure, but if disclosure is not made and permission to disclose is not granted, then we should inform only those who need to know and tell them only what they need to know in order to avert harm.

1370 Sexual Harassment:

Priests and deacons shall provide a professional work environment that is free from sexual harassment.

Harassment encompasses a broad range of physical, written, or verbal behavior, including, but not limited to, the following:

Unwelcome sexual advances or touching.

Sexual comments or sexual jokes

Requests for sexual favors used as:

- A condition of employment, or**
- To affect other personnel decisions, such as promotion or compensations**
- Display of offensive materials**

Harassment can be a single severe incident or a persistent pattern of behavior. Allegations of sexual harassment will be taken seriously and must be reported immediately to the Office for the Protection of Children and Vulnerable Adults. Archdiocesan procedures will be followed to protect the rights of all involved. Given the seriousness of the consequences of sexual misconduct, especially when minors are involved, clergy have a responsibility to be their brother's keepers in these matters. While they must avoid undue suspicion or unhealthy interference in others' lives, they need to be aware of danger signs in a brother cleric's activities.

Such danger signs are clear violations of the guidelines presented above. In addition, they also need to be aware of the danger to those who, without doing anything wrong, seek the company of children and look to them for the emotional support only normal adult relationships appropriately provide.

When a priest or deacon fears that another priest or deacon may be involved in such behaviors, he should normally speak first to him and also bring his concerns to the Vicar for Clergy. Furthermore, it is important to recognize that the abuse of alcohol or other substances can lead to a breakdown of inhibitions that would normally keep someone from acting inappropriately.

If a priest or deacon himself discovers or determines that he currently is struggling or in the past has struggled with tendencies toward sexual abuse, he is strongly encouraged to bring this to the attention of the Archbishop or Vicar for Clergy.

1380 Screening Procedures:

The Archdiocese of San Francisco will comply fully with the *Charter for the Protection of Children and Young People* in the screening of seminarians and clergy as noted in the particular articles from the *Charter*:

Article 13

“Dioceses/eparchies will evaluate the background of all Archdiocesan /eparchial and parish personnel who have regular contact with minors. Specifically, they will utilize the resources of law enforcement and other community agencies. In addition, they will employ adequate screening and evaluative techniques in deciding the fitness of candidates for ordination.” (cf. National Conference of Catholic Bishops, *Program of Priestly Formation*, 1993, no. 513).⁸

It is the policy of the Archdiocese that all clergy on Archdiocesan assignment will submit to fingerprinting as part of the regular background check, as provided by California State Law. The Office of the Vicar for Clergy and Personnel Office will assist in this process. Priests who intend to work in the Archdiocese of San Francisco must also undergo psychological testing, as prescribed by the Archdiocese.

Article 14

“No priest or deacon who has committed an act of sexual abuse of a minor may be transferred for ministerial assignment to another diocese/eparchy or religious province. Before a priest or deacon can be transferred for residence to another diocese/eparchy or religious province, his bishop/eparch or religious ordinary shall forward, in a confidential manner, to the local bishop/eparch and religious ordinary (if applicable) of the proposed place of residence any and all information concerning any act of sexual abuse of a minor and any other information that he has been or may be a danger to children or young people.” (cf. National Conference of Catholic Bishops and Conference of Major Superiors of Men, *Proposed Guidelines on the Transfer or Assignment of Clergy and Religious*, 1993).⁹

1380.1 - Procedures Governing the Assignment of Non-Incardinated Priests in the Archdiocese of San Francisco

Clergy from Elsewhere Who Seek an Archdiocesan Assignment:

When a priest or deacon applies for an assignment in the Archdiocese, he is asked to fill out an application. As part of that application, he is asked to state that he has not been involved in situations involving sexual abuse. His completed application is then sent to his bishop or proper superior, who is asked to affirm in writing that the answers given in the application are true.

In addition, the bishop or superior is asked to recommend him for ministry in this Archdiocese. The steps of this screening procedure are explained in advance so that he can submit his application with full understanding.

Religious Order Priests Recommended for Ministry in this Archdiocese by Their Religious Provincial

Before a priest or deacon can be transferred for residence to this Archdiocese, his bishop or religious ordinary shall forward, in a confidential manner, to the Archbishop of San Francisco, all information concerning any act of sexual abuse of a minor and any other information indicating that he has been or may be a danger to children or young people. This shall apply even if the priest or deacon will only reside in the local community of an institute of consecrated life or society of apostolic life.

The Archbishop of San Francisco, in receiving a priest or deacon from outside his jurisdiction, will obtain from that priest or deacon’s Ordinary the necessary information regarding any past act of sexual abuse of a minor by the priest or

deacon in question.

Priests Seeking Hospitality or Permission to Assist on a Temporary Basis

The Archbishop of San Francisco has signed a decree establishing particular law for this Archdiocese requiring that all priests or deacons wishing to exercise public ministry here, for *any* period of time, must receive faculties of this Archdiocese from the local Ordinary through the Office of the Vicar for Clergy of the Archdiocese.

In the unlikely event that a priest or deacon from outside the Archdiocese arrives at a parish and wishes to minister publicly, he or his delegate must remain present for the liturgical event. As soon as possible thereafter, he must make contact with the Vicar for Clergy or the Chancellor to make him aware of the event. He will be asked to supply the name of the priest or deacon and his diocese (or religious order) for follow-up by the Vicar for Clergy or Chancellor. (Archbishop's letter dated February 28, 2007 to all clergy.)

1380.2 Screening Candidates for Holy Orders:

The Seminary will continue to offer courses dealing with human sexuality, with celibacy and with the responsibility of ministers in dealing with both children and adults. The Seminary and the Archdiocese will continue to seek ways of screening out persons with tendencies towards violence, child abuse or other forms of sexual misconduct. The Diaconate program will implement similar programs.

When a priest or deacon is ordained, the Seminary or Diaconate Formation Office will send copies of all relevant materials from his file to the Office of the Vicar for Clergy.

1390 Precautions to be taken when an accused priest or deacon takes up residence outside the Archdiocese of San Francisco:

In the event of the transfer of residence (temporary or permanent) of a priest or deacon against whom any credible allegation of sexual misconduct has been made, the following procedure will be followed:

The Archbishop or Vicar for Clergy will contact the Bishop, Vicar General or Vicar for Clergy of the diocese in which the accused priest or deacon will reside to inform the appropriate Archdiocesan official of the fact that the priest will be in residence and the address of this residence, of the nature of the allegation against him, and of his canonical status.

This notification will be conveyed to the diocese of residence both in writing and verbally.

At the same time, the accused will be informed that should he fail to observe the restrictions that have been placed on his ministry, the sustenance provided him by the Archdiocese of San

Francisco will be withdrawn insofar as this is possible. (In cases in which the accused is vested in the retirement plan of the Archdiocese, it will not be possible to withhold his pension payment, but any Supplemental Plan benefit will be withheld).

SERIES 2000

THE PRIEST PERSONNEL BOARD

2100 PRIEST PERSONNEL BOARD STRUCTURE

2110 Introduction:

Since the Archbishop is the one solely responsible for the assignment of all priests in the Archdiocese, he will personally make those assignments himself. The existence of the Priest Personnel Board indicates the Archbishop's desire for assistance in the discharge of this responsibility. Every priest has the right to approach the Archbishop or the Priest Personnel Board concerning his assignment. Since this access requires trust on the part of the priest, the members of the Board are bound to confidentiality and to respect each priest's natural right to privacy.

2120 Functions of The Priest Personnel Board:

2121 To assist the Archbishop in the assignment of priests in the service of the Archdiocese.

2122 In the fulfillment of this task of assisting the Archbishop, the Board will:

2122.1 Implement personnel policies developed by the Council of Priests and approved by the Archbishop.

2122.2 Continually gather data on priest personnel, the personnel needs of the diocese and the more effective placement of clergy personnel all with appropriate discretion;

2122.3 Collaborate with the Director of Ongoing Formation in working with the priests of the Archdiocese on their own ongoing personal and professional development;

2122.4 Conduct parish consultations along with the appropriate dean before making recommendations to the Archbishop concerning assignments of pastors;

2122.5 Conduct consultations with priests in regard to assignments.

2130 Composition of the Priest Personnel Board:

2131 The Priest Personnel Board shall consist of the Archbishop, the Vicar for Clergy (Chair of the Priest Personnel Board) and six priests.

2132 Three priests shall be elected from among the priests specified in Article IV, Section 2, Paragraph A of the Council of Priests' Constitution who are eligible to vote in Council of Priests' Age Group elections, in the following manner: Priests of the Archdiocese shall be elected from among the diocesan priests incardinated in the Archdiocese of San Francisco or assigned by the Archbishop, having faculties to function therein, living within the confines of the Archdiocese.

2132.1 The priests of Age Groups V, VI and VII not yet retired shall nominate three priests from their own Age Group.

2132.2 The priests of Age Groups III and IV not yet retired shall nominate three priests from their own Age Group.

2132.3 The priests of Age Groups I and II not yet retired shall nominate three priests from their own Age Group.

When the nomination process has been completed, all the priests specified in Article IV, Section 2, Sub-section C of the Council Constitution who are eligible to vote in Council Age Group elections shall elect from those nominated:

One priest from Age Group V and VI and those in Age Group VII not yet retired;

One priest from Age Groups III and IV; and

One priest from Age Groups I and II to serve on the Priest Personnel Board.

2133 Two priests shall be appointed to the Priest Personnel Board by the Archbishop.

2134. The Council of Priests shall elect one of its members for a 3-year term. He shall be a voting member of the Priest Personnel Board.

2135. The Council of Priests' delegate is an ex-officio member of the Personnel Committee of the Council of Priests.

2140 Term of Office:

2141 Those elected to the Priest Personnel Board shall have a three-year term and may not serve more than two consecutive three-year terms. The nomination and election of the elected members of the Priest Personnel Board shall take place during the month of April each year. They will assume office on July 1st.

2142 The members appointed by the Archbishop shall serve for a three-year term renewable for a second term.

2150 Officers of the Priest Personnel Board:

2151 Chair: The Chair of the Priest Personnel Board is the Vicar for Clergy.

2151.1 He is a voting member of the Priest Personnel Board, the Ongoing Formation Board and the Retirement Board.

2151.2 He sets the agenda for each Priest Personnel Board meeting.

2151.3 The Chair is responsible for the custody and confidentiality of the Personal Data Forms and Annual Update Forms obtained from the priests.

2152 Board Members: The Board shall meet at least once a month, except during the months of July and August, to formulate recommendations and advise the Archbishop regarding personnel.

2152.1 The board is to develop a list of proposed assignments. After the Archbishop gives tentative approval to the proposals, the Board will consult those involved. Since the proposed changes are not yet final, confidentiality should be maintained. The list is then revised in light of this consultation and returned to the Archbishop for his consideration and final action.

2152.2 In accord with Section 2311.2, Priest Personnel Board members, along with the appropriate dean, will visit a vacant pastorate to consult with the people mentioned in 2311.2. The purpose of this visit is to get a clearer idea of the needs of the parish and of its present condition. Names of priests to fill the vacancy are not to be solicited, nor if they are spontaneously proposed, should they be accepted for discussion at such a meeting.

2153. Executive Secretary: The Executive Secretary, appointed by the Archbishop upon the recommendation of the Board, is an ex-officio non-voting member of the Board. The Executive Secretary is to assist the Board by preparing data and studies of particular areas of concern, e.g. medical chaplaincies, prisons, campus ministry, reports regarding the disbursement of personnel and projections of available personnel.

2200 GENERAL POLICIES GOVERNING PRIEST PERSONNEL

2210 Principles governing the assignment of priests:

2211 The Good of the Church and of the Priest: A priest is ordained to serve the People of God. Therefore, his assignment should involve the needs of the local Church and his own needs to grow personally, spiritually and ministerially.

2212 Continuity in Ministry: Another factor in the assigning of priests is to maintain continuity in the ministerial situation and direction already successfully taken by their predecessors.

2220 Terms for the assignments of priests:

2221. Pastors: Pastors will be assigned for a term of six years.

2221.1 A pastor who does not wish to be reappointed to a second term must inform the Archbishop in writing.

2221.2 Otherwise, on the recommendation to the Archbishop by the Priest Personnel Board, and following an evaluation, the pastor may be appointed to another six-year term. At the end of the term, with the consultation of the Priest Personnel Board, the Archbishop may continue the priest in his pastorate.

2222 Parochial Vicars: The normal length of a parochial vicar's assignment is three to five years.

2230 Annual consultation with clergy:

To assist the Board in making assignments, in December of each year each priest of the Archdiocese is asked to reflect on his continuing service to the Church.

A Pastor is asked to indicate his wish: 1) to remain in his present assignment; 2) to be considered for another pastorate, indicating the type of parish (e.g. suburban, inner-city, bilingual) for which he feels qualified; 3) to be considered for assignment in a non-pastor role.

A non-pastor is asked to indicate his wish: 1) to remain in his present assignment; 2) to be considered for another non-pastor assignment; 3) to be considered for assignment as a pastor, indicating the types of parish (e.g. suburban, inner city, bilingual) for which he feels qualified.

2240 Policy and procedures on letters of commendation and complaint about the priests of the Archdiocese:

Should the Archbishop or members of the Priest Personnel Board receive letters of commendation or complaint concerning one of the

priests of the Archdiocese, these shall be incorporated into his personnel file under the following procedure:

2241 A letter of commendation will be forwarded to the priest with a copy being retained for his personnel file.

2242 Upon receipt of a complaint, the Archbishop or a member of the Priest Personnel Board will urge the person to bring his or her complaint directly to the priest. All substantive signed letters of complaint shall be referred to the priest about whom the complaint is made. After the priest has responded to the allegation, follow-up action will be initiated, as necessary. In the event that a correspondent wishes to remain anonymous, the complaint will not be placed in the priest's personnel file.

2242.1 If there is the possibility of facilitating reconciliation between the priest and complainant, it will be pursued.

2243 When necessary, all who lodge legitimate, signed complaints against one of the priests of the Archdiocese should be notified of the policy and procedures by the Archbishop or anyone the Archbishop would delegate to act as intermediary.

2300 ASSIGNMENT PROCEDURES OF THE BOARD

2310 Procedure to be followed in the assignment of pastors:

Whenever a parish staffed by the priests of the Archdiocese becomes vacant because of the death, resignation, transfer, or retirement of the pastor, the requirements of Canon 524 are observed in utilizing one or more of the following procedures:

2311 The Archbishop asks the Priest Personnel Board to present to him the names of three priests who are best suited for the vacant pastorate. Before presenting the prioritized terna, the Priest Personnel Board should observe the following procedures:

2311.1 Notify the presbyterate that the pastorate is vacant by means of written notification. Any priest may apply.

2311.2 Along with the dean, hold a listening session with each of the following: 1) the outgoing pastor; 2) the parochial vicar(s) and staff; and 3) the parish leadership.

2311.3 Consult the Self-Study of the parish and recent Archdiocesan reports and studies of the parish.

2311.4 Review the Annual Update Forms for priests who have shown an interest in changing pastorates or in becoming a pastor.

2311.5 Review any letters of application for the specific parish.

2312 The Archbishop may request that the Priest Personnel Board investigate the possibility of transfers between two or more pastors. The Board is to consult with the appropriate deans, the Self-Study of the parishes involved, and any other pertinent information before making recommendations to the Archbishop.

2313 The Archbishop, without consulting the Priest Personnel Board, may make the appointment based upon his knowledge of the needs of the Archdiocese and of the parish.

2314 At all times the qualities outlined in the description of a pastor set forth in this policy under Pastoral Ministries and Responsibilities, years of service to the Archdiocese and the specialized needs of the parish are to be significant factors in the choice of a pastor for a particular parish.

2315 The requirements of Canon 524 are to be observed:

“A diocesan Bishop is to entrust a vacant parish to the one whom he considers suited to fulfill its parochial care after weighing all the circumstances and without favoritism. To make a judgment about suitability, he is to hear the Vicar Forane (Dean) and conduct appropriate investigations having heard certain presbyters and lay ministers, if it is warranted.”

2320 Procedures to be followed in the assignment of clergy other than Pastors:

The Priest Personnel Board shall be responsible for the procedures governing changes of assignment and/or ministry. A member of the Board shall meet with the priest requesting a change or completing his term of assignment in order to discuss the type of future assignment desired. This information shall be coordinated with the priest's Clergy Detail Report and Annual Update Form, the parish profiles and job descriptions, and shall be presented to the Board in summary fashion. The Board shall draw up a list of assignments based upon the foregoing:

2321 Once a list of recommended assignments has been approved, the consultation will begin. Those consulted are:

2321.1 The pastor or head of the department or institution to which the priest is presently assigned;

2321.2 The pastor or head of the department or agency to which the priest is proposed for assignment;

2321.3 The priest who is being moved.

2322 The consultation procedure is that method by which the Board informs the priest that a change in assignment is pending. The priest being moved and his proposed pastor or superior are informed that this is the considered recommendation of the Board based on:

2322.1 The parish profile or job description of the institution;

2322.2 The Clergy Detail Report and evaluation of the priest involved in a change;

2322.3 The overall good of the Church in the Archdiocese and the good of the priest.

2323 Because the recommendation of an assignment for a priest is based upon the foregoing realities and values, a priest is expected to give serious consideration to the recommended assignment. If the priest is aware of compelling reasons why he should not accept the recommendation, he should state those reasons to the consultant. However, his reasons should be based upon facts, which are rooted in the same criteria with which the recommendation is made.

2323.1 In order to avoid confusion and unfounded expectations, the priests shall maintain confidentiality concerning these consultations.

2323.2 It is expected that each priest being moved, shall meet with his prospective pastor or superior to discuss his or her mutual expectations and responsibilities in the proposed assignment.

2324 After consultation has been completed, a final list of recommended assignments is presented to the Archbishop for his approval. Once this approved has been given, letters of assignment are sent to all persons concerned, and the assignments are published via an Official Announcement.

2330 Procedures for the assignment of priests to work outside the Archdiocese of San Francisco:

2331. A priest of the Archdiocese of San Francisco who is considering ministry outside the Archdiocese should discuss his intentions with the Archbishop or the Vicar for Clergy. After feedback from the Vicar for Clergy, he shall submit a request for such an assignment to the Priest Personnel Board, who will make a recommendation to the Archbishop, the sole responsible for the assignment.

2340 Procedures for the assignment of newly ordained Archdiocesan priests:

To assist in the assignment of those priests who will be ordained and given their first priestly assignment, the following procedure will be maintained:

2341. The members of the Priest Personnel Board shall meet and interview each candidate for ordination approximately four months prior to the date of ordination.

2342. The Rector of the Seminary and the Director of Field Education from the Seminary shall provide an evaluation of the candidate's previous work. This evaluation shall have already been reviewed by the candidate, appropriate Seminary faculty members, Pastor of the site, and the Director of Field Education. The Rector, the Director of Field Education and

the Vocation Director shall serve as consultants to the Priest Personnel Board in formulating recommendations for the priestly assignments of the candidates for ordination.

2343 Once the proposed recommendations have been approved by the Archbishop, the pastor of the parish to which the newly ordained priest is to be sent is to be contacted. There must be serious reasons for the pastor to object to the assignment.

2344 First Assignments of parochial vicars shall be limited to parish work for a period of 3-5 years. At the conclusion of this assignment there will be an evaluation of the Parochial Vicar conducted by the Personal Board including the use of an instrument similar to the “Periodic Review of Priestly Ministry Survey” used for the evaluation of Pastors.

2345 The newly ordained priest will normally be assigned to a parish, which will broaden his experience of pastoral ministry beyond that which he received during the years of his priestly formation.

2350 Procedures to be followed for priests wishing to enter new forms of ministry:

2351 In order to accomplish the work of spreading the good news, the Church has traditionally relied on both parochial and non-parochial ministry placements. While continuing to encourage traditional forms of ministry, the Archdiocese welcomes new and creative approaches to parochial and non-parochial ministry, which may more effectively meet the particular needs of this time and place. The new types of ministry will be evaluated in light of the priorities of the Archdiocese, the personnel available, and the good of the area.

2352 Procedures for the establishment of new forms of priestly Ministry:

2352.1 Suggestions for new forms of ministry are to be presented to the Archbishop.

2352.2 The Archbishop will evaluate the suggestion for a new form of priestly ministry and may decide to involve the Priest Personnel Board for their advice.

2352.3 There shall be criteria developed for the ongoing evaluation of this new form of ministry.

2353.4 After three years the Archbishop, in conjunction with the Priest Personnel Board, shall determine whether this new form of ministry can be staffed further by a diocesan priest.

2360 Procedures governing the assignment of non-incardinated priests in the Archdiocese of San Francisco:

2361 Preamble: Priestly ministry in the Archdiocese of San Francisco is and has been enhanced by the service of many non-incardinated priests. It is important that priest personnel policy also include the service provided by priests who are not incardinated in the Archdiocese or are assigned to service in the Archdiocese by their religious superiors with the approval of the Archbishop. Full authority and competency for acceptance, assignment and continuation of service of non-incardinated clergy rests with the Archbishop of San Francisco and with those persons or committees with whom he chooses to share the responsibility for this work.

2362 Definition of Terms:

2362.1 For purposes of this policy statement non-incardinated priests are considered to be:

362.11 Clergy incardinated in other dioceses who wish to serve in the Archdiocese of San Francisco; and

2362.12 Religious clergy other than those regularly assigned by their own religious superiors to a parish or apostolate staffed by their religious community with the approval of the Archbishop, and who wish to serve in the Archdiocese of San Francisco.

2362.13 For purposes of this policy statement, service in the Archdiocese of San Francisco is construed to mean the receipt of an official appointment letter signed by the Archbishop.

Temporary service should always conform to Archdiocesan Policy, and should be closely monitored by the Vicar for Clergy.

2363 Application Procedures for Non-Incardinated Priests:

2363.1 The Vicar for Clergy of the Archdiocese shall be responsible for:

2363.11 Responding to all requests for assignment and placement from non-incardinated priests;

2363.12 Personally interviewing and evaluating priests who are deemed competent, with the assistance of members of the Priest Personnel Board;

2363.13 Presenting the recommendations of the Priest Personnel Board to the Archbishop concerning the assignment and evaluation of all non-incardinated priests.

2364 Documentation Required for Petitioners for Priestly Service in the Archdiocese of San Francisco:

2364.1 A letter of attestation and permission, conforming with guidelines issued by the USCCB, from the priest's diocesan bishop or religious superior clearly stating that the priest is in good standing in his diocese or congregation and is available for an assignment of a specified term. Personal contact by phone should be made with the bishop or provincial to review the contents of the letter and to clarify the reasons the applicant wishes to leave his diocese or province of origin.

2364.2 A resume (or a completed Personnel Data Form for Non-Incardinated Priests) written by the priest seeking service in the Archdiocese including:

2364.21 Personal history, date and place of birth, upbringing, schools attended and degrees received, significant illnesses, special talents or

skills in ministry, physical and emotional health at the present moment;

2364.22 Current documentation from the United States Citizenship and Immigration Service, if applicable;

2364.23 Ministerial history - where and when ordained, number and types of assignments held, reasons for transfer;

2364.24 Reasons for requesting to serve in the Archdiocese;

2364.25 Types of assignments for which he feels suited;

2364.26 Types of assignments for which he feels unsuited.

2364.3 Letters of recommendation, Letters from the petitioner's diocesan bishop or religious superior and from the pastor or superior of his last two assignments are required. The letters should attest to his physical and emotional health and the effectiveness of the petitioner's prior service.

2364.4 A DVD or VHS of a petitioner's homily.

2364.5 If deemed advisable by the Board, professional evaluation of the applicant.

2365 Procedures to be followed by the Priest Personnel Board in the process of assignment of non-incardinated priests:

2365.1 After gathering the documentation necessary, two members of the Priest Personnel Board are to interview the priest.

2365.2 Based upon the documentation, interviews and possible consultations, the Priest Personnel Board will then make the appropriate recommendation to the Archbishop.

2365.3 If the Archbishop accepts the priest into the Archdiocese, the Priest Personnel Board will follow the same criteria and procedures employed in the assignment of incardinated priests for his assignment;

2365.4 The Priest Personnel Board, in conjunction with the Ongoing Formation Board, is to establish a program to familiarize the priest with the programs and the policies of the Archdiocese.

2365.41 If the priest is from another culture, the Priest Personnel Board is responsible for arranging for the priest to attend a program to help him become familiar with the culture of the United States and with the traditions of the local Church. This orientation program will take place as soon as possible.

2365.42 Every effort should be made to introduce the priest to other priests of the Archdiocese.

2365.43 A priest's language skills should be appropriate for his assignment. For incardination, reasonable proficiency in English is a prerequisite. When the need is indicated, the Archdiocese will assist a priest in achieving the necessary facility in English through utilization of appropriate programs. A task to be accomplished within three years.

2365.5 At the end of six months, the Chair of the Priest Personnel Board or his delegate should meet with the priest and his pastor, and review the priest's service in the Archdiocese.

2365.6 Having heard the Chair/delegate's report, the Priest Personnel Board should make a recommendation to the Archbishop concerning that priest's continuing service in the Archdiocese.

2365.7 Non-Incardinated priests who are not assigned by the Archbishop must have their residency in a rectory approved by the Archbishop.

2400 GENERAL POLICY AND PROCEDURES GOVERNING INCARDINATION IN THE ARCHDIOCESE OF SAN FRANCISCO

2410 Introduction:

Mindful of the provisions of the Code of Canon Law 268.1 and 693, non-incardinated priests are eligible for incardination.

2411 The following steps must be undertaken for priests to be considered for incardination:

2411.1 The priest must write a letter of request for incardination, addressed to the Archbishop, in which he includes reasons for requesting incardination, types of assignments for which he feels suited; and types of assignments for which he feels unsuited.

2411.2 He must complete five years of appointed ministry within the Archdiocese; with no interruptions in service;

2411.3 He must have two independent assignments within those five years and be evaluated at the end of each assignment;

2411.4 The Archdiocese must have on file recommendations from pastors and staff under whom he has served evaluating the priestliness and ministerial skills of the petitioner and indicating the writer's willingness to have the petitioner as his assistant or cooperator (these letters will have been followed up by oral interviews);

2411.5 The Archdiocese must have on file recommendations from a minimum of three other priests incardinated in the Archdiocese evaluating the priestliness and ministerial skills of the petitioner and indicating the writer's willingness to be associated with the petitioner in ministry; these letters will have been followed up by oral interviews;

2411.6 The Archdiocese must have on file a copy of the applicant's correspondence with his diocese of origin, or religious order requesting excommunication; and the response received from his bishop or religious superior;

2411.7 The Vicar for Clergy must have on file the results of a psychological exam arranged through the Office of the Vicar for Clergy;

2411.8 Two members of the Priest Personnel Board will have completed an interview with the applicant and shared their recommendations with the Priest Personnel Board;

2411.9 The Priest Personnel Board will make its recommendation to the Archbishop;

2411.10 The Archbishop will review a summary of the applicant's file with the College of Consultors before reaching a final decision.

411.11 The final decision on any request for incardination rests solely with the Archbishop.

2411.12 The priest seeking incardination will be informed within four months of his request of the decision in regard to excommunication or incardination. If he is ultimately refused, the priest will be referred back to his own diocese or religious order.

SERIES 3000

ONGOING FORMATION AND CONTINUING EDUCATION OF PRIESTS

3100 INTRODUCTION

The Bishops of the United States, in their 2001 document, *The Basic Plan for the Ongoing Formation of Priests*, (hereafter BP) expressed their commitment to the ongoing formation of priests and presbyterates in these words:

“In obedient response to the Holy Father’s express [sic] wishes, we commit ourselves to supplying the necessary personnel, time, and finances to make the ongoing formation of priests an effective reality in the life of our dioceses. We will do our best in our respective dioceses. We will also join forces regionally and nationally, when that kind of collective and collaborative effort and investment will better serve the purpose of ongoing formation for priests. We commit ourselves to reminding our priests of the importance of ongoing formation. We will encourage them in their efforts, and we will call them to accountability in the name of the Church. Furthermore, we will support our priests by informing the entire people of God that the prayer and study of their priests is not something added on to their work but rather is integral to their ministry.” [BP 3]

As articulated by Pope John Paul II in his 1992 Post-Synodal Apostolic Exhortation, *Pastores Dabo Vobis*, (hereafter PDV) ongoing formation is a commitment to which all priests are called by virtue of the “gift of God” [2 Tim 1:6] which they received at ordination. The purpose of this document is to articulate how the Archdiocese of San Francisco will honor this commitment and implement the vision and core elements of *The Basic Plan* and *Pastores Dabo Vobis*.¹

3200 DEFINITIONS

3201 *Pastores Dabo Vobis* describes ongoing formation as “a conscious and free decision [on the part of the priest] to live out the dynamism of pastoral charity and of the Holy Spirit who is its first source and constant nourishment.”

3202 *The Basic Plan* defines ongoing formation as “the continuing integration of priestly identity and function for the sake of mission and communion.” [BP 12]

These definitions clearly place ongoing formation within a holistic framework that seeks to nurture and integrate the four pillars of formation: human, spiritual, pastoral, and intellectual. [PDV 72]

¹ For a more complete understanding of the intent and application of this policy, please consult the *Policy for Ongoing Formation and Continuing Education of Priests* [October 2008] in the office of the Vicar for Clergy.

This lifelong formation includes constant, or “synchronic” aspects, as well as specific challenges that emerge in particular seasons of priestly life and ministry, or “diachronic” elements. [BP 7]

In this document, continuing education will refer to more formal programs directed toward the enhancement of knowledge, skills, and ministerial excellence for individual priests and for the entire presbyterate.

3300 RESPONSIBILITY FOR ONGOING FORMATION

3310 The Individual Priest: Both PDV and *The Basic Plan* make clear that the person primarily responsible for ongoing formation is the priest himself. [PDV 79; BP 35]. The *Basic Plan* calls priests to map out, in conversation with the bishop, his delegate, or members of the presbyterate, his own particular plan for continuing development and enrichment. [BP 36] For priests serving in the Archdiocese of San Francisco, the following elements should serve as a basic minimum for such a plan:

- Thirty contact hours of education each year²
- One week of retreat
- Daily prayer (especially Eucharist and Liturgy of the Hours)
- Regular celebration of the Sacrament of Penance
- Regular contact with a priest group or its equivalent

3320 The Archbishop: The Archbishop has the primary responsibility for overseeing, encouraging, and supporting ongoing formation within the Archdiocese. This responsibility is exercised by his presence at diocesan ongoing formation events, his encouragement of priests to avail themselves of ongoing formation opportunities, and by the development of the appropriate diocesan structures (e.g. personnel, funding, policy) to sustain an effective ongoing formation program. It is the responsibility of the Archbishop and his auxiliary bishops to foster a healthy climate for continuing formation, to communicate to the presbyterate and the People of God that participation in ongoing formation programs is an integral expression of priestly life and ministry, and to provide appropriate means of accountability for the diocesan ongoing formation program. The Archbishop participates and oversees all aspects of ongoing formation within the Archdiocese as he deems most helpful and appropriate.

3330 The Vicar for Clergy: It is the responsibility of the Vicar for Clergy to ensure that the work of the Office of Ongoing Formation and Continuing Education is integrated into the overall vision for priestly life and ministry within the Archdiocese. The Vicar for Clergy is Chair of the Ongoing Formation Board. He works conjointly with the Director of Ongoing Formation to develop the agenda and priorities of the Board. The Vicar for Clergy has the responsibility for ensuring the accountability for the implementation of the ongoing formation policy and for

² The annual Clergy Study Week would ordinarily constitute between 12-16 contact hours. Retreats and Days of Recollection are separate from the contact hours for education. Credible on-line programs may be included as contact hours.

compliance with said policy, both on the part of individual priests and of the Archdiocese.

3340 The Office of Ongoing Formation and Continuing Education of Priests:

The Archdiocese is committed to providing the leadership, staffing, and funding necessary to support the vision of ongoing formation as set forth in PDV and the BP Priests and as outlined in this policy. In this Archdiocese, this policy is implemented through the Office of Ongoing Formation and Continuing Education. The appointment of a director for this office is the responsibility of the Archbishop and should be supported as much as finances, personnel, and other circumstances allow. The duties of the Director / Office include:

- To work in collaboration with the Ongoing Formation and Continuing Education Advisory Board, the Council of Priests, the Personnel Board, and similar Archdiocesan consultative bodies to facilitate continued implementation, development, and evaluation of the Archdiocesan Policy for Ongoing Formation and Continuing Education of Priests.
- To recommend to the Archbishop, upon consultation with the Vicar for Clergy and the Ongoing Formation Advisory Board, topics and speakers for all Archdiocesan ongoing formation programs, e.g. Retreats, Study Weeks.
- To oversee all programmatic aspects of ongoing formation and continuing education of priests within the Archdiocese and to evaluate all programs, projects, and initiatives
- To implement BP within the context of the Archdiocese of San Francisco
- To ensure that all Archdiocesan priests develop and maintain a personal plan for priestly growth and enrichment, and to monitor the progress of those plans
- To oversee the necessary training and continuing support of mentors
- To familiarize himself with the context of priestly life and ministry within the Archdiocese so as to facilitate the recommendation and provision of appropriate ongoing development opportunities
- To consult with priests in a variety of settings to identify the current needs of individual priests and the presbyterate and to solicit recommendations for speakers and topics for Archdiocesan ongoing formation events
- To serve as a resource person to plan sabbaticals and other continuing education programs and proposals.
- To collaborate with ongoing formation personnel and programs, both at a regional and national level, to meet ongoing formation needs

3350 The Ongoing Formation and Continuing Education Advisory Board:

The Ongoing Formation and Continuing Education Advisory Board is comprised of a small group of people (6 – 8 members) with particular knowledge or expertise in the areas of ongoing formation and continuing education within the context of the Archdiocese of San Francisco. Members of the Board are appointed by the

Archbishop for a designated term.³ The responsibilities of the Board include: communicating to the Director and Vicar for Clergy their perception of the ongoing formation needs of the presbyterate and of the effectiveness of current ongoing formation practices within the Archdiocese; developing a sense of direction for the ongoing formation efforts within the Archdiocese and establishing goals and priorities to advance that direction; and providing input on prospective speakers, topics, programs, and procedures to address those goals and priorities.

3360 The Presbyterate: Priests, both Archdiocesan and religious, have a very important responsibility for creating a culture that supports and encourages ongoing formation. They exercise this responsibility by their own commitment to continuing formation, by affirming ongoing formation as an integral element of priestly life and ministry, by collaborating with the Archbishop and his delegates in developing and promoting the Archdiocesan plan for ongoing formation, and by encouraging each other and holding each other accountable for continuing growth and development.

3400 CONSTANT (SYNCHRONIC) ELEMENTS

3410 Clergy Study Weeks: The Archdiocese will sponsor a Clergy Study Week twice each year, usually in June. All priests with an Archdiocesan assignment are expected to attend one of the two weeks. Financing for the Study Weeks will be taken from Archdiocesan funds set aside for this purpose.

3420 Priest Retreats: The Archdiocese will offer two retreat options each year, usually in October. All priests serving in the Archdiocese are required to make a retreat each year. [Canon 276] Any priest with an Archdiocesan assignment who wishes to make other retreat arrangements is to notify the Vicar for Clergy regarding his proposal. Funding for the Retreats will be taken from Archdiocesan funds set aside for this purpose.

3430 Other Archdiocesan Ongoing Formation Events

3431 Annual Clergy Day / Chrism Mass: The Archdiocese will offer each year, in conjunction with the Chrism Mass, an afternoon of recollection for priests serving in the Archdiocese. All priests are strongly encouraged to participate in the Clergy Day and Chrism Mass. The Archdiocese provides the funding for the Clergy Day.

3432 Days of Recollection: The Archdiocese will offer occasional Days of Recollection for priests serving in the Archdiocese, often in conjunction with the seasons of Advent and Lent. Funding for Days of Recollection will be taken from Archdiocesan funds set aside for this purpose.

³ In appointing members to the Ongoing Formation Advisory Board, every effort should be made to ensure that the composition of the Board honor the diversity of age, experience, ministries, and cultural background within the Archdiocesan presbyterate.

3433 Archdiocesan workshops and convocations: From time to time, the Archdiocese may offer a workshop or convocation to address areas of critical importance to its mission. The Archbishop will inform the clergy whether attendance at these events is mandatory, encouraged, or optional.

3440 Priest Support Groups: All priests are encouraged to participate in a priest support group. The Office of Ongoing Formation is available to assist priests in forming or joining such groups.

3450 Spiritual Direction: All priests are encouraged to meet with a well-trained spiritual director on a regular basis. The Office of Ongoing Formation will develop and maintain a list of recommended spiritual directors.

3460 Sabbaticals: A sabbatical leave is available to incardinated priests of the Archdiocese who have been ordained at least ten years and have an assignment in the Archdiocese.⁴ Ordinarily, sabbatical leaves will be granted for a six-month period.

3461 The sabbatical should include participation in an approved program of priestly renewal or educational or ministerial development for three months, as well as an extended retreat and the opportunity for personal rest and renewal. The priest's annual vacation time is to be included within the sabbatical leave.

3462 To apply for a sabbatical, priests are to write to the Vicar for Clergy to request permission and outline their proposal. Priests are eligible to apply for a sabbatical ten years subsequent to their last sabbatical or continuing education leave. Priests interested in a sabbatical leave are encouraged to make their request and proposal at least two years prior to the beginning of the session under consideration. The Archdiocese will make every effort to maximize the number of openings for priest sabbaticals, according to current financial and personnel resources. Priests applying for sabbatical are encouraged to find priests to cover their ministerial obligations during their time away and to ensure that these priests have Archdiocesan approval. The Archdiocese will also assist a priest in finding suitable coverage for his assignment during his absence, should the priest so request. Funding for sabbatical leaves, including salary and benefits, will be taken from Archdiocesan funds set aside for this purpose.

⁴ For the Archdiocesan policy regarding sabbaticals for religious priests in Archdiocesan assignments, see section 3810 below.

3500 PARTICULAR FORMATIONAL MOMENTS (DIACHRONIC ELEMENTS)

3510 First Years of Priesthood: The first years of ordained ministry are very important. They set a pace for the years that stretch ahead and lay a foundation for the future, providing a point of reference across a lifetime of priestly ministry. [BP 41] The Archdiocese of San Francisco seeks to serve and encourage recently ordained priests in the following ways:

3511 Pastoral assignment: The *Basic Plan* recognizes the importance of the first pastor for the personal and ministerial development of a newly ordained priest: As such, the Director of Ongoing Formation will serve as a resource to the Personnel Board with regard to the formational dimensions of the first assignment.

3512 Mentor: The *Basic Plan* also notes that “a priest-mentor can be very helpful in the ongoing formation of newly ordained priests.” [BP 53] Within the Archdiocese of San Francisco, all newly ordained diocesan priests are expected to meet regularly with a trained and approved mentor.

3513 Regional workshops: All newly ordained diocesan priests [1-2 years ordained] are expected to participate in the ongoing formation programs offered for priests of the San Francisco Province or Region XI.⁵ Participation in such workshops is understood to be an integral element of the recently ordained priest’s pastoral assignment, and as such, is not to be regarded as personal time or vacation time.⁶ Funding for such programs will come from Archdiocesan funds set aside for this purpose.

3520 International Priests: The Archdiocese of San Francisco has, throughout its history, been blessed and sustained by the generous and dedicated service of priests born outside the United States. A culturally diverse presbyterate both reflects and enriches the cultural diversity of the local Church. The USCCB Committee on Migration, in its document, *Guidelines for Receiving Pastoral Ministers in the United States*, acknowledges that “pastoral situations have occurred in many dioceses that warranted bringing priests and other pastoral personnel...from other countries to minister in the United States.” [Guidelines 3, 5] The Archdiocese of San Francisco seeks to serve this purpose and support and encourage recently arrived international priests in the following ways:

3521 Pastoral assignment: The 2006 study, *International Priests in America: Challenges and Opportunities*, includes among its conclusions: “With international priests as with newly ordained priests, the first assignment has far reaching consequences in the man’s ministry. It must be carefully

⁵ As of 2008, such programs for newly and recently ordained priests are being offered by the Vatican II Institute for Clergy Formation at St. Patrick’s Seminary and University in Menlo Park.

⁶ Participation in such programs does not substitute for presence at Clergy Study Week, an annual retreat, or other core synchronic elements of an ongoing formation plan.

planned... The first assignment of an international priest must be one in which he will be welcomed and helped.” [International Priests 106] Moreover, “it is important that the host community be educated about the culture of the pastoral minister.” [Guidelines 30] The Director of Ongoing Formation will serve as a resource to the Personnel Board with regard to the formational aspects of the pastoral assignments of recently arrived international priests.

3522 Cultural Orientation Programs: Guidelines recommends several levels of welcome and orientation for recently arrived international priests. [Guidelines 23-30] The Archdiocese of San Francisco, often in conjunction with Dioceses of the Province and Region, will seek to implement these recommended programs for the benefit of recently arrived international priests and the people they serve. All recently arrived international priests with an Archdiocesan assignment, are expected to participate in the diocesan and regional orientation programs in a timely fashion.⁷ Funding for such programs will be shared equally between the Archdiocese, the priest himself, and the parish or institution to which he is assigned.

3523 Mentor: In the Archdiocese of San Francisco, all newly arrived International priests in an Archdiocesan assignment are expected to meet regularly with a trained and approved mentor.

3524 Language assistance / accent reduction: The *Guidelines* highlight the importance of providing programs in American English, accent reduction, etc. for all international priests. All priests serving in Archdiocesan assignments must take seriously their responsibility to communicate effectively in English. Where the Vicar for Clergy identifies a need, the Director of Ongoing Formation will serve as a resource for identifying appropriate resources and programs to assist priests in improving their communication skills. Funding for such approved programs will be shared equally between the Archdiocese and the priest himself.

3530 Proximate Preparation for Pastorate: Recognizing the critical importance of well-formed, well-prepared pastors for the welfare of the Church and the effectiveness of its mission, the Archdiocese of San Francisco seeks to assist recently ordained (2-7 years of ordination) and recently arrived priests in their preparation for pastorate in the following ways:

3531 Pastoral assignments: Pastors of recently ordained priests are encouraged to invite them to assume responsibility for particular areas of

⁷ In 2008, all recently arrived international priests with an Archdiocesan assignment are expected to complete the Cultural Orientation Program for International Priests (COPIM), offered in service to the Dioceses of Region XI via the Center for Religion and Spirituality of Loyola Marymount University, within the first 12 – 18 months following their arrival in the Archdiocese. Other cultural orientation programs are currently being considered, both at the diocesan and regional level, to complement COPIM and to implement more fully the recommendations of *Guidelines*.

parish leadership and administration, as their confidence and abilities merit, and to supervise them in such assignments. The Director of Ongoing Formation will serve as a resource to the Personnel Board in the formational elements of pastoral assignments of recently ordained priests.

3532 Regional ongoing formation programs: The Archdiocese of San Francisco recognizes the importance of formal preparation for the responsibilities of a pastorate during the initial years of service in the Archdiocese and of collaboration with the Vatican II Institute and other Dioceses in the Province and Region to address this need. Recently ordained priests with an Archdiocesan assignment are expected to participate in these interdiocesan programs or their equivalent, either prior to their assignment as pastor or in the early years of their first pastorate. Funding for these programs will be taken from Archdiocesan funds set aside for this purpose.

3533 Archdiocesan workshops: All priests who wish to be appointed as pastor are likewise expected to attend an Archdiocesan workshop to introduce them to Archdiocesan personnel, offices, ministries, and policies.⁸ Funding for this workshop will be taken from Archdiocesan funds set aside for this purpose.

3540 First Pastorate: The first pastorate sets a pace for how growth, development, and formation will happen in the years ahead. The Archdiocese of San Francisco seeks to support and encourage its first-time pastors through the following programs, policies, and practices:

3541 Regional workshop: All first-time pastors and administrators are expected to participate in Region XI's *Beginning as Pastor* program or its equivalent during their first year as pastor or administrator.⁹ Funding for this program will be shared equally between the Archdiocese, the priest himself, and the parish to which he is assigned.

3542 Mentor: The *Basic Plan* affirms the value of a priest-pastor-mentor to provide guidance to new pastors and administrators in assuming their pastoral responsibilities and deepening their priestly identity and spirituality. [BP 73] All first-time pastors and administrators are expected to meet regularly with a trained and approved mentor.

3543 Continuing Education Plan: Upon completion of the regional workshop, all first-time pastors and administrators are expected to develop a five-year continuing education plan to develop further their spiritual, pastoral, and administrative leadership skills. First-time pastors and administrators are

⁸ All first-time pastors of parishes entrusted to the care of religious communities in the Archdiocese are also expected to participate in the Archdiocesan workshop.

⁹ This expectation applies as well to religious priests who are assigned to their first experience as pastor or administrator of a parish.

encouraged to identify workshops, or equivalent programs and resources, which will either strengthen their own leadership skills or better equip them to address the particular needs of the parish to which they are assigned. The Director of Ongoing Formation will serve as a resource for the identification of such programs and resources. Funding of approved programs will be shared equally between the Archdiocese, the priest himself, and the parish to which he is assigned.

3550 Other formational moments: The BP identifies other important transitional moments in the life of priests, e.g. changes of assignment, midlife, and retirement. The Ongoing Formation Board will discuss and develop appropriate responses to these formational moments at a later date.

3600 CONTINUING EDUCATION PROGRAMS

3610 Full-time advanced degree programs to which a priest is assigned:

3611 Definition: Programs to which a priest is assigned for the purpose of pursuing a full-time program in an accredited institution, e.g. a master or doctoral level program pursued on a full-time basis.

3612 Eligibility: An assignment to such a program is the responsibility of the Archbishop. The Personnel Board, the Ongoing Formation Board, and, when appropriate, the Director of the concerned Archdiocesan agency or department, may assist in the identification and selection of qualified candidates for such programs. Diocesan priests who wish to be considered for assignment to full-time studies leading to an advanced degree should consult with the Director of Ongoing Formation concerning their interests and qualifications and how these might serve the present and future needs of the Archdiocese.

3613 Funding: For assignments that originate from the Archdiocese, the Archdiocese will provide funding for all expenses directly related to the completion of the approved degree program, as well as provide the priest's salary and benefits package. For assignments that originate from an individual priest, funding arrangements will be negotiated on a case by case basis.

3620 Short-term educational experiences requiring absence from assignment

3621 Definition: Programs which require the absence of the priest from his regular assignment for an extended period of time of up to six months, but not necessarily leading to a degree, e.g. programs to provide foreign language facility, clinical pastoral education, training in spiritual direction, etc.

3622 Eligibility: All diocesan priests serving in a diocesan assignment may request permission for a short-time educational leave.

3623 Requirements: Assignments to such programs must be approved by the Archbishop. Recommendation of such approval is the responsibility of the Ongoing Formation Board, in conjunction with the Personnel Board. Such recommendation and approval will be contingent upon the assessment of the quality of the program proposed and the needs of the Archdiocese. Priests interested in such an educational leave should consult with the Director of Ongoing Formation at least six months in advance of the proposed starting date of the educational leave. Priests are also expected to consult with their pastor or supervisor before making their proposal. If the proposal is approved, it is the responsibility of the priest himself to arrange for coverage during his absence from his assignment and to ensure that the proposed replacements have Archdiocesan approval. The Archdiocese may also assist a priest in finding suitable coverage for his assignment during his absence, should the priest so request.

3624 Funding: Funding arrangements for the educational program will be negotiated on a case by case basis.

3630 Part-time programs not requiring absence from assignment

3631 Definition: Programs offered by accredited institutions or agencies for academic credit, ordinarily leading to a degree or certificate, which a priest may pursue in conjunction with his regular Archdiocesan assignment, e.g. a Master's program offered by a local college or university not requiring full-time residence.

3632 Eligibility: All diocesan priests serving in a diocesan assignment may request permission to participate in such programs.

3633 Requirements: The approval of the Archbishop is required for all such programs. Recommendations for such approval are the responsibility of the Ongoing Formation Board in conjunction with the Personnel Board. Such approval and recommendation will be contingent upon the assessment of the quality of the program, its relevance to the ministerial needs of the Archdiocese, and its helpfulness to the priest. Priests desiring to engage in a particular program should consult with the Director of Ongoing Formation at least six months in advance of the proposed starting date concerning the type of program, his rationale for pursuing it, and the financial arrangements. Priests are also expected to consult with their pastor or supervisor before making their proposal.

3634 Funding: Funding arrangements for the particular program will be negotiated on a case by case basis.

3640 Short-term educational programs in the context of an assignment

3641 Definition: Workshops, institutes, conventions, seminars, etc. sponsored by the Archdiocese or other institutions or agencies which do not require prolonged absence of a priest from his assignment, e.g. liturgical workshops, management seminars, etc.

3642 Eligibility: All diocesan priests serving in an archdiocesan assignment are eligible for such short-term educational programs.

3643 Requirements: All priests serving in the archdiocese are encouraged to avail themselves to workshops that they judge to be relevant and beneficial toward his ministerial development, in keeping with their individual growth plans. Priests are eligible for one such workshop each year. Absence from the assignment for a short-term workshop requires the approval of the pastor or supervisor. The priest himself is responsible for securing coverage for his assignment during his absence.

3644 Funding: Ordinarily, the priest himself is responsible for all costs associated with the educational program.

3700 ONGOING FORMATION OF THE PRESBYTERATE:

“The corporate sense of priestly identity and mission, although not fully developed even in official documents, is clearly emerging as an important direction for the future.” [BP 93] The ongoing formation of the presbyterate has a three-fold purpose: a missionary and ministerial purpose; the purpose of promoting pastoral charity; and a sacramental purpose. [BP 94] The cultivation of presbyteral unity in the service of a common mission provides an important framework both for the individual priest’s understanding and practice of ongoing formation and for the development of Archdiocesan policy, priorities, and programs in the area of ongoing formation of priests. The Office of Ongoing Formation and Continuing Education, in consultation with the Archbishop, the Vicar for Clergy, the Council of Priests, and other appropriate offices, is responsible for designing and promoting a plan for the ongoing formation of the presbyterate that implements the instructions of BP within the context of the Archdiocese of San Francisco.

3800 ADDITIONAL POLICY AREAS

3810 Religious priests serving in Archdiocesan assignments: The Archdiocese of San Francisco seeks to support and encourage the ongoing formation of religious priests serving in Archdiocesan assignments. The presence and participation of religious priests in Archdiocesan ongoing formation programs strengthens the collaborative relationship between religious and diocesan priests in their service to the local Church. Most areas of the Archdiocesan Policy for Ongoing Formation and Continuing Education of Priests, apply equally to diocesan priests and to religious

priests with an Archdiocesan assignment. Recognizing the distinctive nature of religious life, the following elements of the Ongoing Formation Policy require appropriate adaptation:

- **Priestly growth plans:** It is the expectation of the Archdiocese that all religious priests with an Archdiocesan assignment develop and observe an individual growth and development plan appropriate to the charism of their community and to the ministry they exercise in their assignment.
- **Sabbatical eligibility and funding:** Religious priests in Archdiocesan assignment are eligible to apply for a sabbatical through the Office of Ongoing Formation. The Archdiocese will provide appropriate funding for approved sabbatical requests. The funding policy is currently under review.
- **Mentors:** One of the central elements of the practice of mentoring in the Archdiocese is an invitation to a deeper integration of the priest's diocesan identity and ministry. It is the expectation of the Archdiocese that the religious communities will provide mentoring for their newly ordained priests, their first-time pastors, and their priests who have recently arrived in the United States in a manner that serves the deepening integration of the priest's religious identity and ministry.

3820 Permanent deacons: Archdiocesan practice and policy for the ongoing formation of permanent deacons is the responsibility of the Permanent Diaconate Office. Deacons are welcome to attend the annual Clergy Day offered in conjunction with the Chrism Mass. Deacons may also attend the Clergy Study Week, as space is available.

3830 Seminarians: It is highly desirable that Seminarians studying for the Archdiocese of San Francisco, particularly during their pastoral year and their final year of seminary formation, participate in Archdiocesan ongoing formation programs and events, as feasible. Ongoing formation events provide a fitting setting for introducing seminarians to the local presbyterate and for laying the foundation for their own practice of continuing formation after ordination. The Director of Ongoing Formation, in consultation with the Archdiocesan Vocation Director and the Vicar for Clergy, will extend the appropriate invitations.

3840 Mentors: The Archdiocese of San Francisco recognizes the importance of effective mentoring for priests in the midst of important moments of transition in their life and ministry. The Archdiocese is committed to the necessary training and continuing support of its mentors.¹⁰ Funding for the training of mentors will be taken from Archdiocesan funds designated for this purpose.

¹⁰ As of 2008, the Archdiocese is committed to sending two or three priests each year for training as mentors via the *Mantle of Elijah* program offered by the Vatican II Institute for Clergy Formation at St. Patrick's Seminary and University in Menlo Park. The Ongoing Formation Advisory Board is in the process of developing an Archdiocesan policy for mentoring.

SERIES 4000

PRIESTS' BENEFITS

4100 SALARY

“All priests and transitional deacons should receive their salary on the last day of the month.” (Statute 186). It is the responsibility of the parish or office to which the priest is most recently assigned to pay the salary for the entire month even if, because of a transfer, the priest was not in his present assignment for the entire month (Statute 185). Salary will be based upon the Schedule for Priests Compensation as set annually by the Chancery Office. Such compensation also includes health benefits.

4200 VACATION

Priests are expected to devote five and one-half days a week to their assigned ministry. Their time away from assigned ministry can involve being away over-night. The free time is to be chosen in light of the needs of the parish and in consultation with other priests of the house.

4210 Each year, five days are given to each priest for retreat and five days for the Ongoing Formation Program. One full day each month can be taken for a priest support program which may include an overnight.

4220 Priests are entitled to one month (30 days) of vacation each year. (Canons 5550.3 and 533.2) In addition, following Christmas and Easter, priests are allowed up to one week of vacation (excluding weekends).

4300 RETREAT

7310 Canon Law requires each priest to make an annual retreat (Canon 276.2 and 276.4).The priest’s annual retreat is paid from a special fund set aside for that purpose.

4400 ONGOING FORMATION (c.f. Series 3000)

4410 Every Archdiocesan priest is entitled to one week of “formation leave” per year in addition to an annual vacation and retreat. The fee for the annual study week is paid by the special fund established for that purpose.

4420 At the discretion of the vicar of clergy, priests approved for supplementary studies may receive funding for such studies.

4500 RETIREMENT (c.f. Series 5000)

The Priests' Retirement Plan for incardinated priests is entirely funded by the Archdiocese.

4600 MISCELLANEOUS BENEFITS

4610 "It is the duty of each parish to provide adequate board, lodging, home cleaning, along with laundry and dry cleaning service." (Statute 185)

4620 All offerings received on the occasion of funerals and the administration of the Sacraments of Baptism and Matrimony belong to the parish, except that a ten dollar stipend may be retained by the priest who offers a Funeral Mass or a Nuptial Mass.

4630 All Souls' Day offerings and offerings for house blessings, parlor services, Mother's Day and Father's Day are given to the parish.

4640 Stipends given for a Mass intention are retained by the priest who offers the Mass.

ADDENDUM

Guidelines for suggested stipends based on the survey of June, 2008:

SUNDAY SUPPLY:

One Mass - no preaching	30-100 - average \$50.
One Mass - preaching	50-100 - average \$75.
Two Masses - no preaching	30-125 - average \$100.
Two Masses - preaching	30-200 - average \$135.

WEEKDAY MASS:

10-50 - average \$25.

RECONCILIATION

25-150 - average \$60.

DAY OF RECOLLECTION:

50-200 - average \$150.

WEEKEND RETREAT:

100-750 - average \$200.

TRIDUUM:

150-500 - average \$350.

MISSION:

75-1000 - average \$225.

GOOD FRIDAY:

50-500 - average \$200.

SERIES 5000

KEEPING FAITH WITH OUR RETIRED PRIESTS

5100 INTRODUCTION

The retired priests of the Archdiocese continue to serve our local Church through their active ministries, their pastoral wisdom, and most of all through their continued fidelity to their priestly promises and witness. It is in gratitude for the service of these men of God over a lifetime that the Archdiocese commits itself to providing them financial support, personal care and priestly solidarity. It is in recognition of the unique commitment that diocesan priests make to this Archdiocese that this care should include the provision of housing, health care, a pension, and the spiritual and fraternal support so necessary to creating a supportive environment for retirement.

5200 PRIESTS' RETIREMENT BOARD

Recognizing that the Archbishop exercises the primary pastoral responsibility for the pastoral care of retired priests of the Archdiocese, a Priests' Retirement Board shall advise the Archbishop on the constellation of issues which pertain to retirement. This Board shall be composed of the Archbishop, the Vicar for Clergy, and the Vicar for Administration *ex officio*; two non-retired members elected by the presbyterate, three retired members elected by the retired presbyterate, and three members appointed by the Archbishop. One of the appointed members shall be a lay person, while the remaining two appointed members shall be priests of the Archdiocese.

The Priests' Retirement Board meets as needed, usually several times annually, to review existing programs for the care of retired priests, evaluate emerging needs of retired priests not currently being met, and be a conduit for concerns raised by the retired priests themselves.

5300 AGE OF RETIREMENT

The normal retirement age for a priest of the Archdiocese is seventy. Priests may request early retirement from the Archbishop if they have reached the age of sixty or for health or medical reasons.

The Vicar for clergy shall present each case to both Personnel Board and the Retirement Board who will determine the benefit package.

5400 ARCHDIOCESAN PRIEST PENSION PLANS AND FUNDS

The Archbishop has established a retirement program to provide a stable and financially secure retirement for all of the incardinated priests of the Archdiocese.

The IRS-qualified priests' retirement plan of the Archdiocese provides a vested monthly income for retired priests based upon their years of service in this Archdiocese.

The supplemental retirement plans of the Archdiocese provide health care and housing allowances for our retired priests, as well as an appropriate base level of benefits for those priests who do not qualify for an adequate pension through the qualified pension plan.

It is the responsibility and commitment of the Archdiocese to provide sufficient funding to maintain the health and stability of these qualified and supplemental retirement programs. Such funding will come from the proceeds of the Archdiocesan Annual Appeal, the annual collection for retired priests and various bequests and gifts donated to the Archdiocese for the benefit of retired priests.

5500 HOUSING

Retired priests may select from three differing housing options:

5510 Living in a parish rectory:

A retiring pastor will be required to move from his present parish to a new residence. A priest choosing to live in residence in a parish will receive from that parish the same benefits as a priest assigned to active duty in that parish, with the exception of salary, health premium and retreat fee. Those benefits provided by the parish will normally be given without reimbursement in recognition of the retired resident priest's on-going service to the parishioners. In cases where this would create a financial hardship for the parish, the pastor may request the payment of the standard housing benefit on behalf of the retired priest from the supplemental priest's retirement fund.

5520 Living in congregate housing provided by the Archdiocese:

(E.g. Serra Clergy Retirement House). The cost of this housing and board shall be borne by the Archdiocese.

5530 Living in non-Archdiocesan owned housing:

Each retiree shall receive the standard housing benefit from the supplemental retirement fund to help defray the cost of such private housing and board arrangements.

5600 ASSESSMENT AND SUPPORT

Care for our retired priests entails recognition that the aging process can require substantial changes in a priest's ability to remain healthy and meet the requirements of daily life. While it is vital to recognize the legitimate freedom of each retired priest, pastoral solicitude demands that our retired priests be supported by a systematic program of professional assessments and evaluation that can alert the priest and the Archbishop to changes in the priest's physical health and mental faculties. The Priest's Retirement Board advises the Archbishop on the proper scope and substance of this program.

The Vicar for Clergy works in collaboration with the Archbishop to insure that every retired priest continues to live in an appropriate setting and receives the spiritual, health, pastoral, physical and financial resources to enjoy the healthiest and happiest possible retirement.

5700 LONG-TERM CARE

The cost of assisted living and skilled nursing care for Archdiocesan retired priests constitutes both a burden and a worry for priests as they enter into their retirement years. Because of the lifetime commitment of service to the people of our local Church given by our retired priests, it is appropriate that the Archdiocese share part of that burden. Four principles govern the nature and scope of financial support for assisted and skilled nursing care: 1) the Archdiocese can and should provide a substantial share of the cost of assisted living and skilled nursing care for every priest in need of such care; 2) the Archdiocese should insure that no priest is precluded from receiving quality care because of financial limitations; 3) Archdiocesan policy should flow from the recognition that many priests have financial resources beyond their pension and social security benefits that could meet some of the cost burden of assisted/skilled care; and 4) the limited monies available for the needs of retired priests should be applied among the competing priorities of pension, health care, and housing on the basis of where those funds are most needed.

In light of these principles, the Archdiocese will provide to every priest in need of assisted living or skilled nursing care a housing allowance paid to the facility where the priest is going to receive the prescribed assistance and care. This assisted living/skilled nursing allowance will be the lesser of: one half of the monthly cost of the assisted living/skilled nursing facility or an amount equal to the monthly pension benefit of a fully vested priest of the Archdiocese who has served for thirty years.

Any priest who is unable to pay for quality residential or skilled nursing care with the help of this basic care allowance, the regular Archdiocesan pension, Social Security and his other financial resources, may apply for additional financial assistance from the Archdiocese. This application will entail a comprehensive review of the applicant's financial resources, and the principle governing that review would be that no priest should be unable to obtain quality care because of financial limitations.