

Clergy Transition Instructions

The following instructions are to facilitate a smooth transition for clergy and parishes, increase communication and reduce the strain for all parties in adjusting to pastoral changes. These instructions are helpful not only to pastors and administrators of parishes, but also to all priests in transition within the Diocese.

Timeline

- a. In October, the Bishop will send the Priest Assignment Survey to all priests in active ministry.
- b. Each priest will return his complete survey to the Bishop's office by November 15.
- c. The Bishop and the Clergy Assignment Council will meet to consider the requests of the priests and the needs of the parishes and the Diocese in the coming year. If desired, a priest may attend one of these meetings to discuss his assignment.
- d. Ordinarily, the assignments will be made and ready for announcement prior to the first weekend in May. This will allow for sufficient time for a smooth transition for the priests and parishes.
- e. The Chancellor will be responsible for assuring that the Clergy Transition Instructions and the Clergy Transition Pastor Report is distributed to all transferring priests.
- f. Within ten (10) days after the announcement, the current pastor is to contact the incoming pastor and establish a mutually agreed-upon date for a parish visitation (see below).
- g. The outgoing pastor will complete the Pastor's Report (see attached). This document is shared between the outgoing and incoming priests and is designed to facilitate their dialogue for a smooth transition.
- h. Ordinarily, a priest will begin a new assignment on July 1. The Bishop will establish the date of transition, but it is up to the outgoing and incoming priests to agree on the actual moving date.
- i. Within thirty days of the move, the priest who has moved is to submit any requests for reimbursement for standard moving expenses to the parish to which he is assigned. A newly ordained priest is to have his moving expenses paid by the parish to which he is being assigned.

Pastoral Visitation

Within ten (10) days after the announcement, the current pastor is to contact the incoming priest and establish a mutually agreed upon date for a parish visitation. During the visit the current pastor should:

- a. Share the contents of the Pastor's Report and updates on the parish with the newly assigned priest.
- b. Introduce the newly assigned priest to:
 - Deacons
 - Members of the Parish Pastoral Council and the Parish Finance Council
 - Lay Directors
 - Parish staff
 - Key parish leaders
- c. Assist the incoming priest by providing:
 - A tour of the facilities and indicate how they are opened and secured
 - A list of pending Mass intentions
 - The Mass schedule and other sacrament schedules (baptism, reconciliation, etc.)
 - Financial and sacramental records

Other Transition Expectations

- a. The outgoing priest is to arrange for the cleaning of the rectory so that it is ready for new occupancy.
- b. The outgoing priest must take all personal items upon his departure.
- c. The outgoing pastor is responsible for transferring all relevant utility accounts prior to his departure (e.g., parish cell phone, satellite TV or cable).
- d. The outgoing pastor will facilitate the transfer of signature cards for all parish bank accounts.
- e. The outgoing pastor is to ensure that all keys are left and clearly marked.
- f. The outgoing priest is to make any necessary repairs, prior to his transfer, caused by him through the use of tobacco or by his pet(s), etc.

Post Transition Courtesy

- a. Ongoing communication between the priests involved in the transition is encouraged and should be at the initiative of the newly assigned priest.
- b. With due respect for the newly assigned pastor, all requests for the former priest to return for a wedding or funeral are to be made through the newly assigned pastor.
- c. If the former priest returns for a funeral or wedding, with the approval of the newly assigned pastor, the newly assigned pastor normally will be the presiding celebrant.

Clergy Transition – Pastor’s Report

1. Pastor’s experience and vision. Write a synopsis of your tenure as pastor:

This part is a fraternal document to be shared between the outgoing and incoming pastors. It is to be available at the time of the visitation, but is not for public distribution. It should be kept confidential or destroyed after the pastors have discussed it.

- What were the challenges when you arrived and how did you address them?
- What new challenges did you address and what goals did you accomplish?
- Which of these old and new challenges still need attention?
- What priorities do you suggest for the future?

2. An overview of the parish structure:

- Deacons and a description of their ministry.
- Parish staff members, job descriptions and payroll.
- List of the Lay Directors.
- A copy of the statutes for the Pastoral Council and the Finance Council, with a list of the members of each group.
- Meeting practices – regular meeting schedule, preparation, meeting culture
- Parish Committees
- Organizations (e.g., Altar Society, Council of Catholic Women, Knights of Columbus).

3. An overview of the parish’s life, programs, and ministries.

- Pastoral Planning process update
- Faith formation programs: Youth, Adult, RCIA/RCIC, Baptism, First Communion, Confirmation, Marriage Preparation, etc.
- Ministries: Pastoral Care of the Sick & Homebound, Food Bank, Jail Ministry, etc.

4. Parish statistical information and profile.

- Status Animarum/Official Catholic Directory forms
- General history of the parish (if available).

5. Facilities report.

- Maintenance schedule
- Maintenance concerns
- Projected improvements
- Future projects

6. Parish calendar.

- Current calendar year and recurring annual events
- Upcoming events and ministerial commitments (e.g., weddings).

7. Financial records and procedures:

- Budgeting process (dates, practices)
- Previous year’s budget and end of year Income and Expense Report
- Previous year’s minutes

- Current year's budget and an Income and Expense report through the 3rd Quarter
- Current year's minutes
- Procedures for proper accounting of funds: counting collections, deposits and payables
- Copy of last internal audit (if available)
- Purchasing practices: purchase orders, reimbursements, credit card usage

8. Operational Information

- Information Technology: website, cloud storage, database, email accounts
- Communication: telephone system and practices, "email or text blasts", bulletin deadlines and practices
- Office hours
- Opening and closing of facilities

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