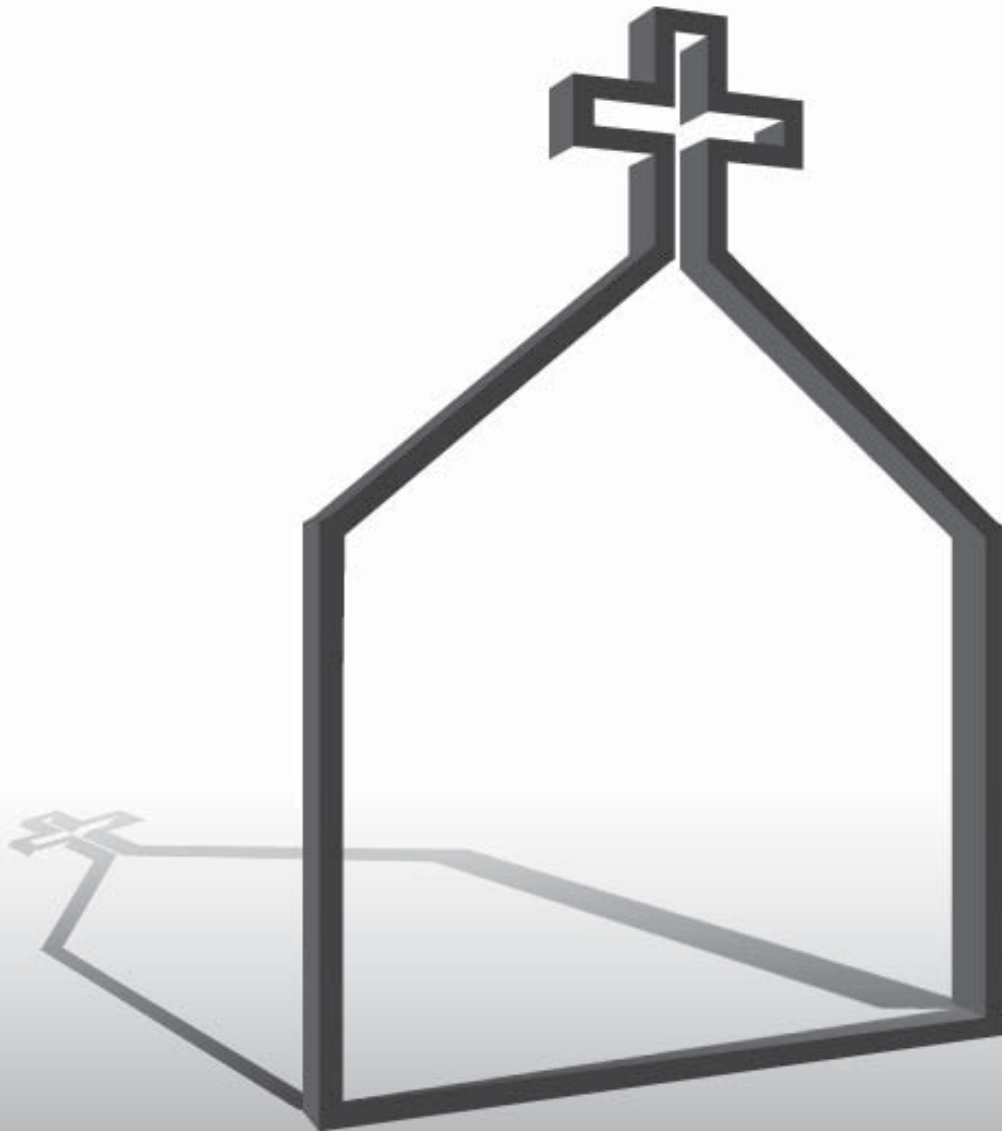




RESOURCE MANUAL FOR PARISH RESTRUCTURING

A R C H D I O C E S E O F D E T R O I T





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I. HISTORY OF PLANNING IN THE ARCHDIOCESE OF DETROIT

Since its establishment as a diocese March 8, 1833, the Archdiocese has faced continual change within the Church and the wider civic society. A steady stream of immigrants from various European, Hispanic, Mid Eastern and Asian cultures, as well as urban sprawl have all greatly impacted the Archdiocese.

Due to shifting populations, in 1989, 31 parishes closed. Immigrants continued to arrive, and urban sprawl continued as city and ring suburban populations moved to outlying areas.

In 1994, the Council of Vicars and the Archdiocesan Pastoral Council made Vicariate Pastoral Planning one of our highest priorities. It was seen as a healthy channel to ensure planning would happen from the parish and vicariate level and not just from “the top down.”

In 2004 the *Together in Faith* process was designed with three major focus areas: (1) parishes and schools were asked to be **Mission-Minded** as they planned for ministry responding to the needs of all spectrums of the population. (2) **Developing Leadership**, both ordained and lay. (3) **Christian Stewardship**, a comprehensive plan to fully and fairly utilize human resources, talents and treasures.

During the *Together in Faith* process, all parishes and schools within the Archdiocese of Detroit were asked to assess their potentials and limitations, gifts and challenges. Such discussion never ends, in light of ever evolving needs and changes. The planning process put great emphasis on the local level—the parishes and their groupings as vicariates; from that local input, recommendations and timetables were formulated which respected the data regarding the number and age of available clergy, financial considerations and resources, as well as conditions of buildings and locations of schools. Literally thousands of people gave of their time and insight to help shape the future of our local Church.

We must always be ready to consider new challenges and new opportunities. With continued population shifts, reduced or changed employment opportunities, fewer priests, changes in ministry needs, and growth in immigration, some areas of the Archdiocese need new parishes and schools, while in other areas, there is need for better sharing of resources.

The *Together in Faith* process revealed some changes needed across the entire Archdiocese. Some parishes are clustering, merging or being closed (suppressed). These changes cause great pain, and those most affected are experiencing grief. In several other areas, communities are exploring the possibility of starting new parishes. This Parish Restructuring Manual has been developed to assist parishes in these transitions.

II. THE PROCESSES FOR PARISH RESTRUCTURING

The *Together in Faith* process required parishes and schools to assess their current and future status and vicariates were to identify the parishes that should change through clustering, merging, consolidating, suppression or building.

To provide as much guidance and support as possible, the Archdiocese of Detroit has put together procedures to assist parish leadership as they move through this process.

THEOLOGY OF CHANGE

Change is an unavoidable part of life; at times, we welcome it and at other moments, we fear it. *Together in Faith* has challenged us to come to terms with change on many levels – in our hearts, in our families, in our communities of faith and in the civic arena. For people of faith, openness to change is a vital part of hearing the Good News and living as disciples of Christ Jesus.

When facing change the first challenge is *discernment of God's will*. *Discernment* requires us to ask whether the change is good and necessary. Some things, such as Church doctrine and teaching cannot change. Other things, such as Church discipline and some structures, may change depending upon the circumstances and situations. Discernment, study, and honest dialogue are necessary whenever we face potential change in the Church. After we have gone through *discernment* about any potential change, the second challenge is *openness to implementing necessary changes*.

Many of our pastors, clergy, lay professional ministers, support staffs, and lay leadership will experience new configurations of parish life in the future. The key components for facilitating change in the structure of a parish community are prayer, vision and leadership. The pastoral letter, "*The Journey Before Us*," confirms that:

- Since change is ongoing, for the health and well-being of the Church, we need to be discerning and open in a spirit of prayer.
- No one parish or school can function apart from the rest of the Archdiocese. Each of our parishes and schools has gifts to offer and needs the support and expertise of other parishes and schools. No parish – no matter how large or financially strong – is exempt from the process.
- Well-trained, competent leadership—clergy, religious, and lay—is a critical building block for the Church of the future.
- Growth and diminishment, change and transformation make sense only against the backdrop of the Death-Resurrection of Jesus Christ, which we experience and celebrate daily in the Holy Eucharist.
- The Church is a spiritual reality, a communion for the sake of mission, which has visible expression in and through parishes, schools, and institutions. Changes of external structures are intended to build up, sustain, and renew our enduring commitment to share together in Christ's three-fold mission as priest, prophet and shepherd ruler.

Change in the organizational structure of the current parish may be clustering, merging, and/or closure (suppression) of parishes or opening (erection) of new parishes. Please note the sequence or order of these terms and their meaning:

- **Clustering**—two or more parishes, remaining somewhat independent, share a pastor—a first step in a process which may lead to a **merger** of parishes as one entity with one site (or with multiple locations with outreach centers and/or chapels for special/occasional purposes). Eventually, according to financial circumstances and appropriate ways to ensure pastoral care, there could even be reason to move toward the actual closing of a Church building or suppression of a parish.
- Conversely two large parishes could share a priest pastor for a specific length of time if individual pastors were unavailable. Staff and leadership would remain separate, but seek areas for collaboration. Once a priest became available, each parish would be assigned its own pastor and the cluster would be dissolved.
- Finally a vicariate may discern a need for a new parish to ease overcrowding of existing parishes, and/or in response to projected demographics. In this instance parishes work together to form a new community with the ultimate goal of erecting new church buildings.

KEY ELEMENTS OF RESTRUCTURING

The restructuring of parish communities should be “mission driven”, not “survival driven.” A mission driven process is grounded in prayerful discernment, trusting in the guidance of the Holy Spirit. It embraces resistance, anxiety and potential barriers by recognizing the giftedness and difference in each other. No parish, cluster, merger, closing or opening is identical. Every parish community has its own individual personality that reflects the history, ethnicity, mission, values, and liturgical style of the members who share a common faith tradition. Restructuring identifies the best practices of each parish to develop something new by combining the ways of each. The Center for Applied Research in the Apostolate identifies eight key elements for restructuring:

- **Set Goals** It is important to clearly distinguish between goals and strategies, between mission and structure. Develop a list of elements of a Sacramental, Strategic and Sustainable parish so that pastoral care, not priest availability, becomes the basis for making decisions.
- **Provide Leadership** Effective reorganization requires leadership of the Archbishop and his staff. Then it extends to active leadership at the parish level. Support and training for those involved in planning and implementing parish change is essential.
- **Adequate Preparation** Sometimes described as “planning to plan,” this step includes the work of gathering information, consulting on the design of the process, establishing procedures and criteria, and setting a timeline.

- **Educate the People** Provide information to help parishioners understand the need for reorganization: data about priests and parish life and facilities, a “theology of mission,” the role of lay leadership and ministry, and the parameters for what is possible.
- **Collaborate and Consult** The word most commonly used in advice about parish reorganization is “involve.” This process should include parishioners and the presbyterate as active and equal participants.
- **Move at a Deliberate Pace** There should be sufficient time for meaningful participation before making the final decisions and for the process of transition when changes are implemented.
- **Prepare for Emotional Difficulty** Every transition requires a parish letting go of something that is cherished, and this involves pain.
- **Remember the Importance of Prayer** For both bishops and parishioners, prayer is vital!

Adapted from The Cara Report Vol. 9, No. 4 Spring 2004

These are suggested ways to build dialogue, develop a plan and lead a community to new life through restructuring. Leadership is encouraged to adapt their own practices which reflect the communities which are transitioning together.

HOW TO USE THIS PARISH RESTRUCTURING MANUAL

This Parish Restructuring Manual is designed to serve as a step by step guide for the clustering, merging, closing or opening of parishes within the Archdiocese of Detroit. Pastors, clergy, religious, and lay leadership will find invaluable resources within each section of the manual. Within it also can be found the authorized procedures for clustering, merging, closing, and opening new parishes.

ARCHDIOCESAN CONTACTS AND RESOURCES

The Archdiocese of Detroit provides support and resources for pastors, religious, and lay leadership in clustering, merging, closing, and opening new parishes. In the first addendum you will find the names, phone numbers, and web addresses of Archdiocesan contacts who can answer questions regarding established processes, time frames, etc. The contact persons are available as support and are committed to making the transition processes within your parish successful.

If a parish that is going through a restructuring (clustering, merging or closing) has a school, leadership should contact the Office for Catholic Schools and the Department of Education for assistance.

OTHER RESOURCES

The Archdiocese of Detroit offers workshops and seminars to support parishes that may be experiencing change due to the transitions of pastoral leadership, or the forming of new parish structures through clustering, merging, closing or opening. Available workshops and/or seminars are: staff development, pastoral planning, leadership training and conflict management at the parish and vicariate levels.

COMMUNICATION

Open and honest communication is a key component for any transition to be successful. Throughout this process, whether the end result will be a new cluster, merger, suppression or erection of a new parish, the following should be implemented at every step:

- Ongoing parish communication between the pastor, staff, parish pastoral council, the vicariate pastoral council and the Archdiocese of Detroit;
- A special communication committee for the process;
- In addition to bulletin inserts, the pastor sends regular (monthly, quarterly) update letters to registered parishioners;
- Reinforce information at every step through communication at weekend liturgies;
- Send copies of all written communications to the Archdiocese of Detroit, Department of Parish Life and Services.

PREPARATION

Before a decision is made of whether parishes are going to transition, it is important that the *Together in Faith* information be reviewed at the parish and vicariate level. This step includes three very important activities and is designed to provide vicariate leadership an opportunity to complete intensive pastoral planning. Checklists and worksheets to guide you through these steps are available in the Addenda.

STEP ONE Facilitated discussion to study and discuss the need for change. The parishes and vicariate study the available data, including the Parish Evaluation Inventories and final *Together in Faith* plan, Archdiocesan demographics and sacramental data, financial information, building audits, priest retirement ages and availability, etc.

Education of, and **Communication** with, staff and parishioners at every step is critical.

COLLABORATION AND CONSULTATION

STEP TWO Formulate Recommendations regarding possible changes for parishes within the vicariate. This includes developing different scenarios to respond to challenges or opportunities facing parishes.

If a potential cluster is identified, each parish should complete a parish profile and share the results with each other. They should also consider which model of clustering is appropriate for their situation.

Again, **Education** of, and **Communication** with, staff and parishioners at every step is critical.

IMPLEMENTATION

STEP THREE Pastoral planning continues in Step Three. This step is designed to put into motion the recommendations from Step Two. The following sections detail possible models for restructuring, along with implementation steps.

A complete outline, worksheets, and checklists to assist in the successful completion of Step Three are available in the Addenda, and from Resources.

III. CLUSTERING TWO OR MORE PARISHES

When the recommendation in Step Two is to cluster two or more parishes, the following procedures are to be followed. These procedures are designed to ensure a successful cluster.

DEFINITION OF A CLUSTERED PARISH

Clustered Parishes have one priest pastor. The priest may live within the boundary of only one parish and serve one or more parish communities as pastor of each. Each community has its own Finance Committee (Stewardship Commission), and may or may not have geographical boundaries. In addition, according to Particular Law, each parish has its own Parish Pastoral Council (See Synod 69 Statute 1, Canons 526, 518, 533, 536).

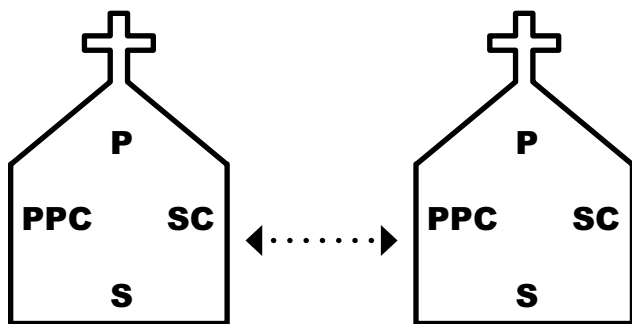
GOAL

The clustering of parishes allows the identity of each parish to be respected and maintained; finances also remain separate. Through good stewardship of resources by coordinating ministerial activities, the sharing of staff, program expenses and capital resources, parishes can sustain vibrant and life-giving communities.

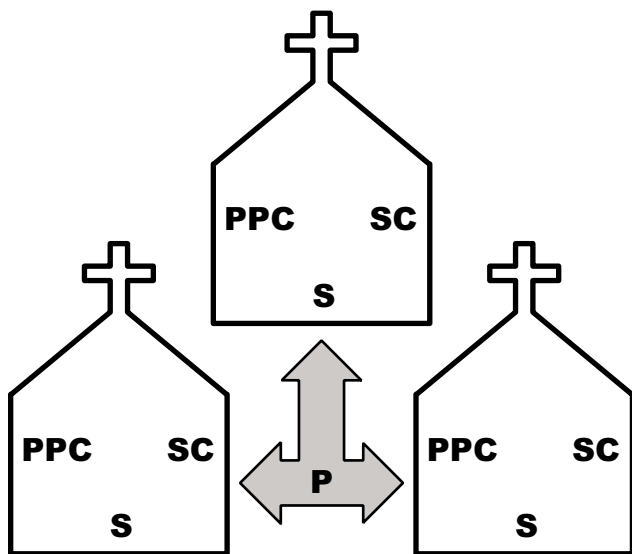
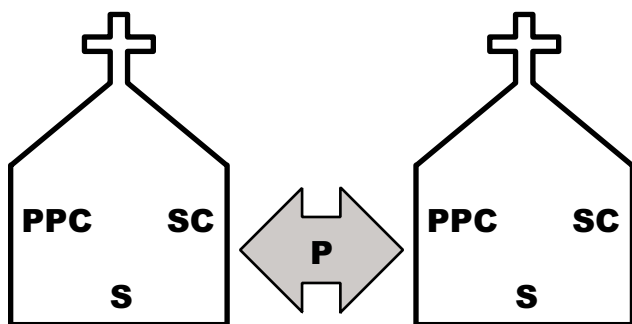
IDENTIFICATION OF POTENTIAL CLUSTERS

- Vicariate pastoral councils (VPCs) in consultation with parish pastoral councils (PPCs) will submit to the Archdiocese a listing of potential clusters that may be implemented within the next five – ten years, or upon the retirement, reassignment or illness of a pastor;
- The VPC will require each PPC to compile a parish profile. The profile will be shared in discussions at the PPC and VPC tables, which will result in potential collaborative relationships and/or future clusters;
- All parishes within the vicariate boundaries consider ways to share liturgical celebrations, resources and /or to develop shared programs;
- When a vacancy occurs in the absence of a vicariate plan the Archbishop, Auxiliary Bishops, and the Assignment Board may propose parishes for a cluster;
- Parish openings for pastor or pastoral staff will be listed as cluster assignments, except in the Temporary Cluster Model. See Addendum B.

COLLABORATION MODEL



CLUSTER MODELS



MODEL I

ALLIANCE COLLABORATION

- Each parish has a Pastor (P), Parish Pastoral Council (PPC), Stewardship Commission (SC), and Staffs (S), and maintain separate finances
- Parishes collaborate on certain programs
- Parishes are not contiguous or in the same vicariate
- Each parish may also cluster with a neighboring parish in their own vicariate

MODEL II

TEMPORARY CLUSTER

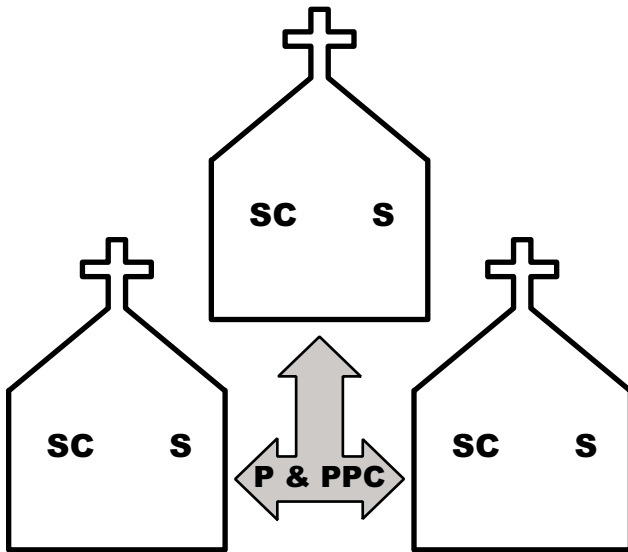
- There is one canonical Pastor (P) who provides leadership, sacramental and pastoral care for two parishes
- Each parish maintains separate finances and separate leadership structures: Parish Pastoral Council (PPC) and Stewardship Commission (SC) and Staff (S), which may meet occasionally to coordinate activities
- Parishes are contiguous and in (or move to) the same vicariate
- Once a priest becomes available, the parishes will each be assigned their own pastor and the cluster is dissolved, but continued collaboration is encouraged

MODEL III

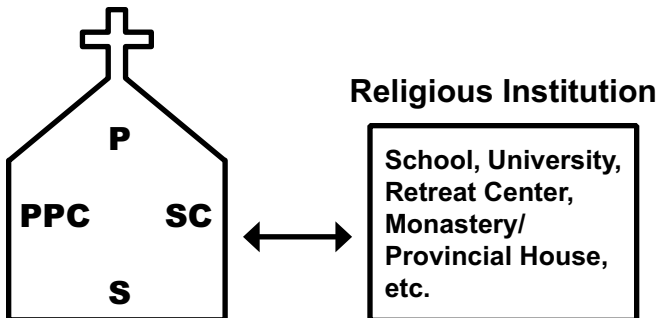
TRADITIONAL CLUSTER

- There is one canonical Pastor (P) who provides leadership, sacramental and pastoral care for two or more parishes
- Parish Pastoral Councils (PPC) meet together on a regular basis, eventually joining together as one
- Each parish maintains separate Stewardship Commissions (SC) and finances until they merge
- Staff (S) may work solely in one parish, some positions may be shared by all
- Parishes are contiguous and in (or move to) the same vicariate
- Eventually parishes may merge into one entity with one/more sites (see merge models)

MODEL IV TRANSITIONAL CLUSTER



- There is one canonical Pastor (P) who provides leadership, sacramental and pastoral care for two or more parishes
- Parish Pastoral Councils (PPC) join together immediately
- Commissions begin to combine
- Each parish maintains separate Stewardship Commissions (SC) and finances until they merge
- SC's meet quarterly together until the parishes merge
- Staff (S) may work solely at one parish, although most positions will be shared
- Parishes will combine some programs and activities
- Parishes are contiguous and in (or move to) the same vicariate
- Parishes eventually merge (see merger models)



MODEL V INSTITUTIONAL CLUSTER

- There is one canonical Pastor (P) who is a member of a Religious Order, who provides leadership, sacramental and pastoral care for one parish
- The Pastor is of the same order as the Religious Institution
- The parish maintains traditional leadership structures of a Parish Pastoral Council (PPC), Stewardship Commission (SC) and Staff (S) and separate finances
- Parish is contiguous to the religious institution and in (or moves to) the same vicariate
- Eventually if the Religious Institution is unable to provide a pastor, the parish will merge or close (see merge models)

PREPARATION FOR CLUSTERING

Parishes should begin planning for clustering at least one full year in advance and a transition team from AOD Central Service Offices will work with the parishes to prepare for the clustering. This includes, but is not limited to: a financial audit, building audit and reviews of liturgical schedules, current and future staffing needs and parish calendars. In the case of necessity, the transition team will work with the clustering parishes as soon as possible, and throughout the first year.

- Parish leadership will come together with a facilitator in a series of meetings to:
 - Celebrate their history through prayer and dialogue
 - Review their parish profiles and determine their commonality in mission, worship, religious education and Christian service
- Staffs will meet together, using an outside facilitator at an independent site, to realize and recognize the gifts of all ministers and staff members.
 - Staffs will review the mission and vision statements of each parish and discuss how each person contributes to them
 - Staffs will identify areas for collaboration
- Leadership will develop a transitional plan to determine liturgical schedules, potential staffing needs and shared operational expenses to be submitted to the regional bishop and vicar for review and approval by the pastor elect.
- During the transitional process parish leadership will keep their congregations apprised of the cluster process through parish assemblies, parish bulletins and weekend announcements.
- The Vicariate Pastoral Council is made aware of and kept informed of the cluster as it progresses.
- Parish leadership will plan joint liturgical and social activities for the congregations to come together during the transition period.

PREPARATION FOR PASTORAL ASSIGNMENT

Every priest is asked to notify the Assignment Board of his intention to retire, renew his current assignment, or to request a change in the fourth of his six-year assignment. A pastor may request to become a cluster pastor if his parish has an established collaborative relationship with a neighboring parish. However it is preferable for a new pastor to be assigned to a new cluster. In emergency situations, an administrator may be assigned until a permanent assignment can be recommended.

LITURGICAL CELEBRATIONS IN CLUSTERS

Parish leadership will determine the schedule for liturgies to ensure an adequate amount of time between liturgies. One liturgy for Holy Thursday, Good Friday, Easter

Vigil, Christmas Eve, Christmas Midnight Mass, and Holy Days of obligation may be celebrated in clusters with parishes rotating as the host site, depending upon the size of the facilities and available number of priests. It should be noted that Holy Thursday and Good Friday must be celebrated in the same church site.

- Unless special factors come to bear, each priest serving the cluster celebrates not more than three Sunday Masses per weekend.
- The worship commissions of the cluster parishes will meet at least quarterly to plan combined liturgical celebrations (Reconciliation Services, Holy Days, Advent, Christmas, Lent, The Triduum, Devotions, Weekday Mass, etc.).
- Combined liturgical celebrations should reflect the cultural and ethnic traditions of each parish.

FINANCIAL POLICIES AND PROCEDURES

Each parish in a cluster will maintain their separate legal and tax identity, and separate financial status. Parishes within a cluster should consider sharing resources and services, as well as combined purchasing, when possible, to reduce costs. In addition, the following Archdiocese of Detroit policies will be observed:

- Parishioners may contribute to their home parish by using their home parish envelope, and offering it at any of the parishes in the cluster.
 - There shall be an understanding in clusters that individuals may offer their marked envelope at any church of the cluster, with the understanding that the envelope will be forwarded to their home parish
 - Loose money stays at the parish in which it was contributed
- Each parish will file separate AOD Financial and Budget reports.
- Each parish will maintain separate LDP and MCC accounts.
- Each parish must maintain its own Stewardship Commission (i.e. parish Financial Council as stated in Canon 537)
- Each parish must maintain its own separate checking account and all revenue and expenses for that parish must go through its own checking or LDP account.
- While each parish in the cluster maintains a separate financial status, the Stewardship Commissions of the clustered parishes will meet at least quarterly to review the financial status of the parishes, to determine what costs can be shared jointly (i.e. staff, equipment and/or facilities, etc.), to eliminate duplicate expenses and to ensure a fair and equitable distribution between the parishes in the cluster.
- Pastor's salary and benefits will be shared equally by all parishes in the cluster.

EVALUATION GUIDELINES

At the end of each year of being clustered, the parishes will evaluate their cluster relationship using the evaluation guidelines found in Addendum C. Beyond the third year, the parishes will do an evaluation every five years:

- Bring staffs together from clustering parishes to conduct evaluation
 - Invite an outside facilitator to conduct the meetings
 - If possible, gather at an independent site
- Realize and recognize the gifts of all ministers and staff members
- Review the mission and vision statements of each parish and discuss how each person contributes to them
- With the approval of the Regional Auxiliary Bishop, clustered parishes may decide to combine their Parish Pastoral Councils into one joint council; however each parish will continue to maintain a separate Finance Committee
- Each year the parishes should evaluate the human and capital resources, use of buildings and duplication of services to determine if the parishes should begin a transition toward merging

IV. MERGING TWO OR MORE PARISHES

When the recommendation in the preparation stage is to merge two or more parishes, the following procedures are to be followed. These procedures are designed to ensure a successful merger by bringing closure to the existing parishes and establishing a new parish community.

NOTE: *Clustered parishes that have implemented the cluster guidelines of shared staffing, a combined parish pastoral council and commissions may have already addressed a number of preparation aspects listed below.*

DEFINITION OF MERGING

Merging is the joining of two or more parishes into a single new parish. The Archbishop can suppress a parish in consultation with the Presbyteral Council (Canon 515). The newly merged parish may consist of one site or have multiple sites (i.e., two church's, one church and one chapel, one site for worship and administration and one for outreach, etc.). The new parish has one parish pastoral council, stewardship/finance council and commissions.

It should be noted that most parishes are Territorial, established to care for the faithful in a certain geographical area of the diocese.

National parishes are established to serve the needs of the faithful by reason of a language, nationality, or for some other reason (e.g. university parish). It is a parish without geographical territory, so its members live within a different, Territorial parish's boundaries.

National parishes will rarely merge. When faced with a need to transition, a National parish is more likely to close, and its parishioners become members of a Territorial parish within whose boundaries they reside.

In these cases of complete closure, Canon 123 assigns the debts, assets and other obligations to the next "higher juridic person". For a National parish, this is the diocese.

PREPARATION FOR MERGING

- Pastors meet to develop a unified transition process for the parishes. If these plans were not in the *Together in Faith* plan they must be considered with the vicariate pastoral council and approved by the Archbishop before further preparation takes place and subsequent steps implemented.
- Pastors and Staffs meet to pray, share their stories, develop ways they will work together to lead their respective parishioners through the transition.
- The proposal to begin a merger discussion is brought to the respective parish pastoral councils for consultation
- A proposed timeline for implementation is determined by the pastor(s), staff(s) and parish pastoral council(s).

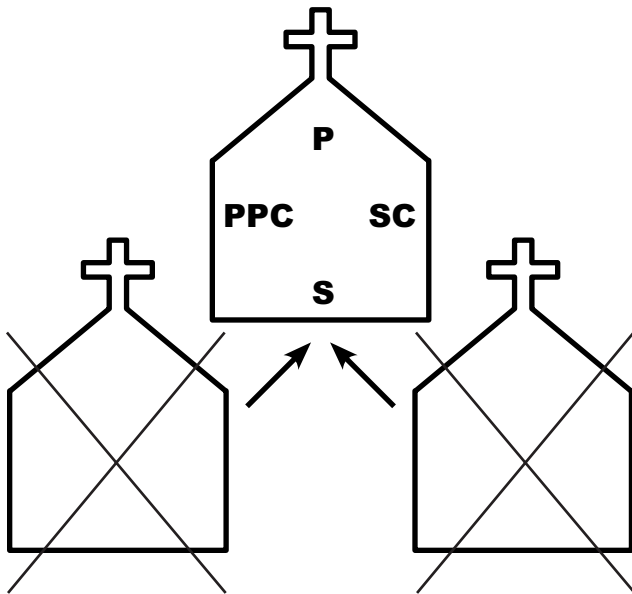
- The vicariate pastoral council is made aware of and kept informed of the cluster as it progresses.
- Parish pastoral councils meet:
 - To share history, build relationships; identify ways that the parishioners will come to know each other through liturgical and social events
 - To determine basic assumptions regarding the new parish
 - To define the mission of the parish
 - To make recommendations and provide feedback to the Transition Teams
- A Transition Team is established and convened by the pastor(s), and appropriate committees are formed, i.e. stewardship, worship, education etc.

The Team will:

- Identify ministerial needs
- To establish a uniform manner of communication to the parishioners.
- Make recommendations for the new budget, staffing and building usage or disposition
- Define the new worship environment and mass schedules
- Agree on a process for selecting a new name if appropriate (Addendum F)
- Plan joint liturgies, liturgy of closing, liturgy of unity, worship aids, closing celebrations and unity celebration
- Begin the convergence of programs, groups and chartered organizations by assessing their mission, membership and activities
- Must be flexible and willing to work for the common good
- A parish assembly is held, preferably with the Auxiliary Bishop or Episcopal Vicar, to inform the parishioners of the proposed merger.
- Joint parish pastoral council meetings will regularly take place with the transition team.
- A formal written request to merge with documentation (copies of PPC Minutes, bulletin announcements, etc.) is sent to the Archbishop at least three months prior to the implementation date.
- The pastor, in consultation with the transition team, the stewardship committee, and various AOD and MCC resources determines staffing needs, writes job descriptions, conducts interviews and realigns staff.

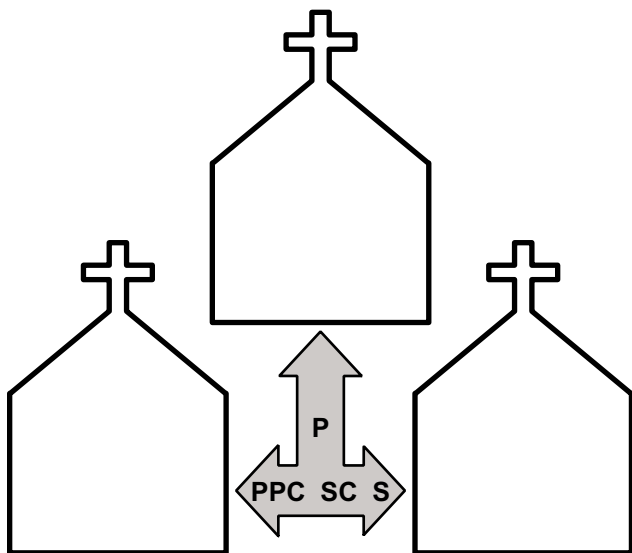
MERGER MODELS

The Archdiocese of Detroit has developed several merger models. The selected model should align with the needs of the involved parishes.



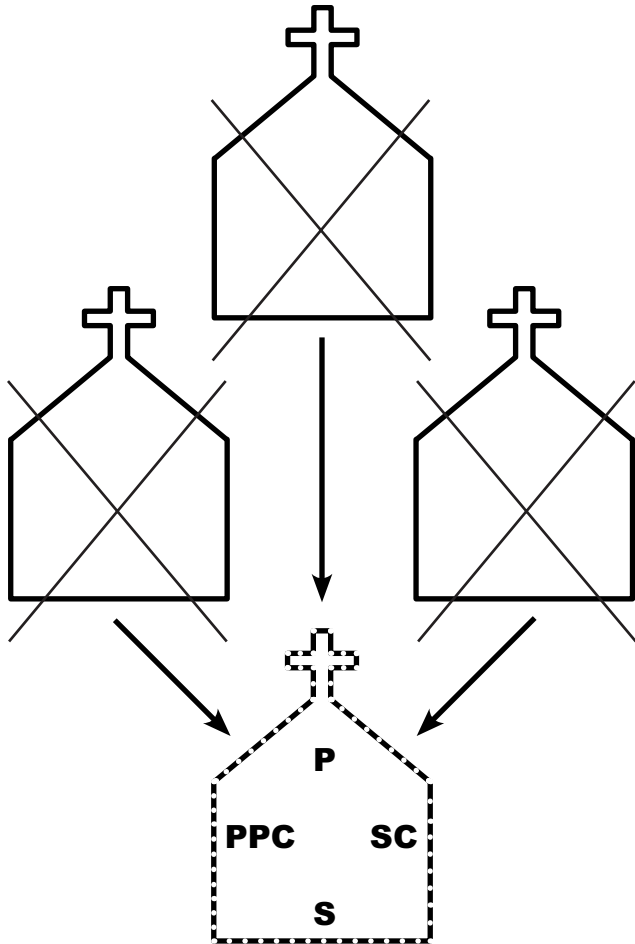
MODEL I MERGED PARISH WITH ONE SITE

- One pastor (P), staff (S), and traditional leadership structure with Parish Pastoral Council (PPC) and Stewardship Commission (SC)
- All finances, sacramental records, are merged together to create a new canonical parish
- One parish plant for all worship, administration, programs, outreach, etc.
- The newly merged parish assumes all geographic territory of the previous parishes
- The newly merged parish preferably assumes a new name, or assumes the name of one of the suppressed parishes



MODEL II MERGED PARISH WITH TWO OR MORE SITES

- One pastor (P), staff (S), and traditional leadership structure with Parish Pastoral Council (PPC) and Stewardship Commission (SC)
- All finances, sacramental records, are merged together to create a new canonical parish
- Two or more sites, one or more for worship and administration, remaining sites possibly for another purpose such as outreach, specific programs, etc.
- The newly merged parish assumes all geographic territory of the previous parishes
- The newly merged parish preferably assumes a new name, or assumes the name of one of the suppressed parishes



MODEL III CLOSE AND BUILD

- All sites are suppressed, and together build a new church
- New Parish has one pastor (P), staff (S), and traditional leadership structure with Parish Pastoral Council (PPC) and Stewardship Commission (SC)
- One set of finances, sacramental records
- One site for all worship, administration, programs, outreach, etc.
- The newly merged parish assumes all geographic territory of the previous parishes
- The newly merged parish preferably assumes a new name, or assumes the name of one of the suppressed parishes

IMPLEMENTATION OF MERGER

- Liturgies of closure and appropriate celebrations take place.
- A mass for the new parish is celebrated, usually presided over by the regional bishop.
- New mass schedules are implemented.
- Historic documents that are to be preserved are sent to the archives at the Archdiocesan Central Services. The guidelines for archival material should be followed.
- Sacred objects of closed churches are moved and disposed of according to archdiocesan guidelines.
- Contents of buildings that will not be used are disposed of and buildings possibly sold with the assistance of the appropriate AOD offices.
- Debts and assets are merged into the new parish Loan Deposit Program with assistance from the Finance Department.

POST MERGER GUIDELINES

- The new parish staff develops a working relationship and vision as a ministry team.
- A parish pastoral council, consisting of members of all parishes is established, and new officers are selected.
- Parish goals are developed, including parishioners, leadership and staff in the process.
- Ministries and commissions are established.
- Parish programs, groups and chartered organizations are merged, eliminated, or replaced with new programs and organizations.
- During the first year, the parish continues to define itself, to heal the grief of the parishioners through spiritual renewal.
- On-going efforts to monitor and assess the emerging results, refine and revise aspects of the merger based on learning from the experience.

FINANCIAL POLICIES & PROCEDURES

The business managers of the involved parishes will work with the designated staff person from the Department of Finance and Administration, Office of Parish Support Services to complete the following tasks. As of the effective date of the merger, the newly merged parish will be a new independent legal and tax entity, separate from the formerly existing parishes that were merged. As such, the newly merged parish will have one Stewardship Commission (i.e. parish Financial Council as stated in Canon 537) and file one AOD Budget and Financial Report for all activity.

The following steps will need to occur to establish the new parish as a separate legal and tax entity, and close out the merged parishes' as legal and tax entities.

NEW PARISH ENTITY MUST:

- Apply for a Federal Tax Identification number (Form SS-4) in the new parish name.
- Apply for state registration by filing Form 518 *Application for Registration with the Michigan Department of Treasury*.
- If the parish is located in a taxable city (Detroit, Hamtramck, Highland Park, Lapeer, Pontiac, Port Huron), contact the city Treasurer office to determine if a city registration application is required.
- Open a checking account in the new parish name
- Order checks and deposit slips in the new parish name.
- Set up LDP Accounts in the new parish name. Determine when merged parishes' LDP loan & savings account balances will be transferred to the new parish's LDP accounts.
- Have all employees fill out Form W-4, Form MI-W4, state Form 3281 New Hire Reporting Form, and Form I-9 for the new parish (even if they were formerly employed by one of the merged parishes)
- Establish a new MCC Unit and enroll employees under the new parish name.
- Prepare and submit an AOD Budget for the new parish
- Order contribution envelopes for the new parish

MERGING PARISHES MUST EACH:

- If building(s) are being closed to be sold, the Pastor must contact the Archdiocese of Detroit Buildings Department as soon as the building 'close' date is known. The AOD Buildings Department will prepare the building properly for closure and will take over the payment of bills related to the ongoing maintenance of the building, after the closure date. (See fifth item below)
- Inform vendors of the new parish entity, and that the merging parish checking account will be closed as of the date of the merger.
- Transfer cash from the parishes' checking accounts into the new parish checking account, as of the date of the merger. Close all bank accounts, including parish organization accounts.
- Destroy all unused checks and deposit slips (shredding is preferable).
- Reconcile the closed bank account(s) and give a list of outstanding checks to the pastor of the new parish. Checks may be reissued, as necessary, by the new parish.
- Terminate all benefits for all employees (giving consideration for severance benefits, if any).

- Pay all payroll liabilities through the date of the merger, including Flex Benefits and 403(b)/TSA amounts deducted from pay, and taking into consideration deductions for severance pay and/or benefits, if any.
- Reconcile payroll & payroll taxes and issue W-2s to all employees.
- Prepare payroll tax returns and mark as 'Final Return' (Form 941, Form 163-Notice of Change or Discontinuance for state, Form 165-Annual Return of Michigan Withholding and Sales/Use Taxes, City Annual Withholding Return, Form 945 if applicable, etc.). Submit Form 165 and city annual return with state/city W-2's and 1099's (see next two items).
- Transmit W-2's to Social Security Administration with W-3 no later than the due date of the final Form 941, to state with Form 165 annual return (due February 28, but should be filed when federal W-2's are filed), and to city government with city annual return.
- Issue 1099s to all applicable contractors, and transmit to Federal government with 1096 and submit state and city copies are transmitted with state and city annual return(s).
- Prepare a final AOD Financial Report through the close date.
- Review all existing equipment lease/rental agreements with the pastor of the new parish, and determine whether to terminate or transfer to new parish. Forward original equipment lease agreements to the pastor of the new parish.
- Submit all bank statements and financial records of the parish, including parish organizations, to the pastor of the new parish.
- Contact specific vendors to forward ongoing bills related to buildings (utilities, alarm service, lease payments, etc.) to the Archdiocese of Detroit (Attn: Buildings Department, 1234 Washington Blvd, Detroit, MI 48226). This process will remain in place until the parish buildings are sold.
- Set up mail forwarding to the new parish (through the post office), for all other mail and bills not related to buildings
- Prepare and distribute contribution statements to parishioners.
- Give computer with financial software and data to pastor of new parish.

V. PROCESS FOR OPENING (ERECTION) OF A NEW PARISH

If the current parishes in a given area are unable to accommodate the entire Catholic population, and demographic trends indicate continued population growth, it may become necessary to open a new parish. As in the other transition models discussed, education and communication are key components at every step.

DEFINITION OF ERECTION

Erection of a parish means to begin its existence. From time to time, as populations shift, new parishes are needed. Parishes can be erected to serve the needs of Catholics in a geographical area (territorial parish) or a group of Catholics that share a common bond such as language or ethnicity (national parish) (canon 518). Though the Diocesan Bishop is the only one who can erect parishes, he does so in consultation with the Presbyteral Council (canon 515§2). A parish is commonly understood to:

- be a territorial section of the Archdiocese
- have a proper church edifice
- have a Catholic population
- be assigned a pastor
- have responsibility for the care of souls in the assigned territory

PREPARATION FOR OPENING A NEW PARISH

- Vicariate Pastoral Council provides leadership and direction for the initial study together with appropriate Archdiocesan offices to determine need for a new parish.
- Leadership from the parishes in the immediate vicinity will meet to discuss the implications of a new parish, keeping the Vicariate Pastoral Council informed of its progress. Parishioners will be notified of the possibility and potential implications.
- The community may begin, with the approval of the Archbishop, to sponsor a non-traditional site for Mass, such as in a school or community center.
- The community will be overseen by a priest chaplain in consultation with the parish in which it geographically resides and with the vicariate pastoral council. The priest chaplain will be administrator of the goods. Any donations collected will be deposited into a Loan Deposit Program account with the Archdiocese of Detroit.
- The community will be connected to or sponsored by a territorial or national parish, similar to a mission.
- A Mass schedule for the community will be created and coordinated by the assigned priest administrator.
- A leadership council will be formed similar to a parish pastoral council. Members may eventually form the first parish pastoral council and Commission Chairs upon erection of the new parish.

COLLABORATION AND CONSULTATION

Once the community has grown to a significant, stable number, they will begin the formal process of becoming a parish.

- After receiving the support of the Vicariate Pastoral Council, a formal written request to erect a new parish is sent to the Archbishop at least one year prior to the implementation date.
- The community and vicariate will request and obtain approval from the College of Consultors to search for property for a new parish site, working with the Archdiocesan Properties Office (Addendum D), and eventually to begin a capital campaign (Addendum E).
- A proposed timeline for implementation is determined by the leadership council.
- An assembly is held to inform the regular Mass attendees, leadership and parishioners of neighboring parishes of the proposed new parish, preferably with the regional bishop.
- Regular Mass attendees should be registered, although they should continue to be registered at their originating parish until a new parish is erected.
- Offertory envelopes should be used.
- The community, under the authority of the priest chaplain (who could be the pastor of the parish in which the community geographically resides), will provide normal parish ministries and activities such as Religious Education, sacramental preparation, etc. at the site where Mass is held.
- Sacraments may be celebrated as authorized by the Archbishop, and will be registered in the sponsoring parish.
- Parish boundaries are proposed, in consultation with the Vicariate Pastoral Council and neighboring pastors.

IMPLEMENTATION FOR OPENING A NEW PARISH

- The parish will work with the Archdiocesan Properties Office to purchase property and begin designing the new building. (see Addendum D)
- The leadership will identify and hire the architectural firm(s) and a liturgical consultant. (see Addendum D, E)
- All registered parishioners will be engaged in the capital campaign.
- Once the pastor is named, in consultation with the new parish pastoral council, Stewardship Commission, and various AOD and MCC resources, he will
 - Determine staffing needs, write job descriptions, and conduct interviews
 - Develop the new budget
 - Finalize building usage for each phase of building

- Upon implementation the Leadership Council becomes the new parish pastoral council and will work to:
 - Agree on a process for selecting a new name (Addendum F)
 - Build relationships; identify ways that the parishioners will come to know each other through liturgical and social events
 - Define the mission of the parish and identify ministerial needs
 - Determine basic assumptions regarding the new parish
 - Establish a uniform manner of communication to the parishioners
 - Form appropriate commissions and committees, i.e. stewardship, worship, education
 - Make recommendations and provide feedback
 - Help design the new worship environment and mass schedules
 - Plan liturgies, worship aids etc
 - Begin identifying programs, groups and chartered organizations by assessing their mission, membership and activities
 - Provide representative to the Vicariate Pastoral Council

FINANCIAL POLICIES AND PROCEDURES FOR OPENING A NEW PARISH

When a parish is opened (erected), the pastor or Business Manager should contact the Director of the Archdiocesan Audit Department and plan for the following steps to open the parish as a legal and tax entity.

- Apply for a Federal Tax Identification number (Form SS-4)
- Apply for state registration (Form 518 Application for Registration) with the Michigan Department of Treasury.
- If the parish is located in a taxable city (Detroit, Hamtramck, Highland Park, Lapeer, Pontiac, Port Huron), contact the city Treasurer office to determine if a city registration application is required.
- Open a checking account in the new parish name
- Order checks and deposit slips in the new parish name.
- Set up LDP Accounts in the new parish name.
- Have all employees fill out Form W-4, Form MI-W4, state Form 3281 New Hire Reporting Form, and Form I-9 for the new parish.
- Establish a new MCC Unit and enroll employees under the new parish name.
- Prepare and submit an AOD Budget for the new parish.
- Order contribution envelopes for the new parish.
- Include financial support for work of the Vicariate.

VI. CLOSING OR SUPPRESSION OF A PARISH

DEFINITION OF SUPPRESSION

Suppression of a parish is another way of saying that the parish has ceased to function or that the parish entity no longer exists. The Archbishop can suppress a parish, in consultation with the Presbyteral Council (canon 515). The parishioners are invited to go to neighboring parishes until an agreement can be reached with local pastors to officially redraw parish boundaries.

PREPARATION FOR SUPPRESSION

- As in the other transition models discussed, education and communication are key components at every step
- Pastor meets with staff and leadership to develop the process and timeline for suppression
- After receiving the support of the Vicariate Pastoral Council, a formal written request signed by the pastor and parish pastoral council Chair is sent to the Archdiocese of Detroit at least three months prior to implementation. Include copies of appropriate documentation i.e. PPC Minutes, bulletin announcements.
- Plans for the closing liturgy are developed

COLLABORATION AND CONSULTATION

- A communication plan is developed, including letters to parishioners, bulletin and pulpit announcements, etc.
- A parish assembly, preferably with the Regional Bishop or Episcopal Vicar, is held to inform the parishioners of the need for suppression. Parishioners are invited to visit neighboring parishes to attend liturgies
 - Neighboring Pastors may write letters of invitation directly to registered parishioners, indicating the newly drawn parish boundaries and communication through the vicariate structures could also be helpful
 - Transportation issues are addressed

IMPLEMENTATION

- One or several grief sessions are held for parishioners and leadership (Addendum G).
- Liturgies of closure and appropriate celebrations take place (Addendum G).
- Historic documents that are to be preserved are sent to the Archdiocesan Archives. The guidelines for archival material should be followed (Addendum H, I).
- Sacred objects of closed churches are moved and disposed of according to archdiocesan guidelines (Addendum J).

- Contents of buildings that will not be used are disposed of and buildings possibly sold with the assistance of the appropriate AOD offices (Addendum J).
- Debts and assets are held in a separate account with assistance from the Finance Department. Once the parish boundaries have been redrawn the assets and debts are allocated accordingly.
- Pastor and Stewardship Commission work with Finance Department to resolve any outstanding financial issues.

FINANCIAL POLICIES & PROCEDURES FOR SUPPRESSION

- When a parish closes (is suppressed), and there is no merger involved, the pastor or Business Manager should contact the Director of the Archdiocesan Audit Office and plan for the following steps to close out the parish as a legal and tax entity. (See fourteenth item below)
- The Pastor must contact the Archdiocese of Detroit Buildings Department as soon as the building 'close' date is known. The AOD Buildings Department will prepare the building properly for closure and will take over the payment of bills related to the ongoing maintenance of the building, after the closer date.
- Issue final paychecks to all employees, including accrued vacation pay due, and severance pay, if applicable.
- Pay all remaining payroll liabilities, including remitting Flex Benefits and 403(b)/TSA amounts deducted from pay, and taking into consideration deductions for severance pay/benefits, if any.
- Reconcile payroll & payroll taxes and issue W-2s to all employees.
- Prepare payroll tax returns and mark as 'Final Return' (Form 941, Form 163- Notice of Change or Discontinuance for state, Form 165- Annual Return of Michigan Withholding and Sales/Use Taxes, City Annual Withholding Return, Form 945 if applicable, etc.). Submit Form 165 and city annual return with state/city W-2's and 1099's (see next two items).
- Transmit W-2s to Social Security Administration with W-3 no later than the due date of the final Form 941, to state with Form 165 annual return (due February 28, but should be filed when federal W-2's are filed), and to city government with city annual return
- Issue 1099s to all applicable contractors, and transmit to Federal government with 1096, and submit state and city copies with state and city annual return(s).
- File payroll tax returns and mark 'Final Return' on each tax form (941, State Annual Return, City Annual Withholding Return, 945 if applicable, etc.).
- Contact MCC to terminate all employment programs (giving consideration for severance benefits, if any).
- Inform vendors that the parish is closing and the checking account will be closed as of the date of the parish closure.
- Transfer cash from the parish's checking accounts (including parish organization accounts) into the parish LDP Account, as of the parish closure date. Close all bank accounts, including parish organization accounts.
- Destroy all unused checks and deposit slips (shredding is preferable).

- Reconcile the closed bank account(s) and give a list of outstanding checks to the Archdiocese of Detroit Audit Staff. Checks may be reissued, as necessary, by the Archdiocese of Detroit.
- Terminate existing contracts, subscriptions, equipment leases, and rental agreements with proper notice.
- Contact specific vendors to forward ongoing bills (utilities, alarm service, lease payments, etc.) to the Archdiocese of Detroit (Attn: Buildings Department, 1234 Washington Blvd, Detroit, MI 48226). Set up mail forwarding at the post office to the same address.
- Prepare and submit a final AOD Financial Report.
- Prepare and distribute contribution statements to parishioners.
- Retain computer with financial software and data for Archdiocesan Audit Office

OF SPECIAL NOTE: SCHEDULED MARRIAGES

Marriages that are scheduled to take place in a parish after the suppression date must be rescheduled. Ideally, the marriage should be rescheduled at the parish designated to accept parishioners from the suppressed parish, with the same celebrant. Often, this solution is not possible, but a solution must be found. It is very important that pastoral staff work closely with the couples involved to arrive at a suitable solution.

The following guidelines have been developed to assist in rescheduling of marriages:

- Once the final suppression date is known, contact the Welcoming Parish to determine if the scheduled marriage dates are available.
- Contact the couples whose marriage dates fit the schedule of the Welcoming Parish to determine if the new site is acceptable. If the couple agrees to the change, confirm the date and time with the Welcoming Parish.
- Contact the couples whose marriage dates conflict with the schedule of the Welcoming Parish to assist them with selecting a new date or location for the marriage ceremony.
- Contact the parishes identified by the couples whose schedules do not fit the Welcoming Parish's schedule to advocate for the couple.