



ARCHDIOCESE OF HARTFORD

OFFICE OF THE ARCHBISHOP
134 FARMINGTON AVENUE
HARTFORD, CONNECTICUT 06105

May 1, 2017

Dear Friends in Christ,

We are heirs together of a long history of Catholic institutions and apostolates in the Archdiocese. How are we going to be good stewards for tomorrow, so that our cherished legacy thrives in the future? That is the question, and our present challenge. Together we can accomplish this, not out of fear, but with confidence, creativity and as a community of faith.

This is my vision for our Archdiocese, it's not only or even primarily about personnel, finances or buildings, as important as they are. It is my hope and prayer:

- that all of us in the Archdiocese look beyond what we perceive to be our own good and our own interests, or those of our own group, for the sake of the common good and the promotion of the interests that truly serve the mission we have from Christ;
- that all of us strive to break out of our many secularized and materialistic preoccupations, and make a commitment of time and effort, individually and together, to study, reflect and pray about our Catholic faith and our relationship to God in His Church;
- that all of us move beyond a minimalist mindset of the least we have to do to fulfill our Catholic obligations to God, the Church and our neighbor, and instead show individual initiative and creativity in committing ourselves, and inspiring others, to take responsibility for our Church and to be what Pope Francis calls "missionary disciples" to the world;
- that we open our hearts and minds to conversion away from what an increasingly hostile culture proposes to us as true, and instead seek the truth of Christ, proclaimed by the Church, that alone can open our hearts and set us free;
- that by striving for this vision we be revitalized by a new generation of young Catholics who believe and practice their faith, and who hear and respond generously to the vocation to marriage and family life, and to priesthood and consecrated life.

To those many devoted parishioners who love Christ and his Church, and who give generously of their time, talent and treasure to support the Church's mission, I can only say "thank you" with all my heart. May every member of our archdiocesan family of faith feel welcomed and supported as we work and pray for our own new "Pentecost," that is, an outpouring of the Holy Spirit for a renewed and vibrant Church committed to missionary discipleship and responsible stewardship.

This "Policies and Procedures Manual" is a key feature of the vibrant Church. It has been designed and is offered to you, your parishioners, and collaborators with the hope that this difficult process might be made more manageable. The contents are meant to clarify and prioritize the many tasks that need to be accomplished and to provide planning tools and instruments to accomplish those tasks in a most helpful, respectful, and efficient fashion. I have approved all of these materials and I ask you to follow their instructions diligently and implement them thoroughly. The pastoral experience and administrative insight of many competent people have contributed to this fine and thorough resource. It is essential that you and your staff read through the entire manual before attempting to implement any part of it. Many questions can be answered and fears set aside through the proper use of this helpful manual which we are describing to you today.

All of us have come to the Church and its ministry with the hope of doing good, bringing comfort, building up the Kingdom of God, and changing lives for the better. None of us anticipated nor looked forward to the difficult task of closing a parish precious to its members. However, Jesus Christ and his Body, the Church, are born of and have triumphed through the agony of the cross. It is this Paschal Mystery that we celebrate in every Eucharist and it is the source of unending grace for each of us individually and all of us as a community of faith. Let us renew ourselves in the cross of our Savior and rely upon the power of his resurrected life and love as we undertake this challenge before us. With this faith in the love of God, this parish consolidation will not be for us simply an ending, but also a path to a new and vibrant life.

For more information, visit <http://www.stewardsfortomorrow.org/>

Sincerely yours in Christ,

A handwritten signature in dark ink, appearing to read "Leonard P. Blair".

Archbishop Leonard P. Blair
Archbishop of Hartford

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Introduction to the Policies and Procedures Manual

The purpose of the Policies and Procedures Manual is to provide a consistent method to do the many and varied tasks related to the consolidation of parishes. It is directed to the local leadership of the parishes involved in consolidation, principally, the pastor, administrator or pastoral associate. It embodies directives for all consolidations including those parishes that are closed, merged and / or closed and merged.

The Archdiocese Pastoral Planning office and the Department of Property and Assets will provide support and on site guidance to local leadership of parishes in carrying out the procedures of the manual. Names and offices for specific tasks are included and are included as reference. All offices of the Archdiocesan administration will work in cooperation to assist the local leadership.

CHECKLIST FOR POLICIES AND PROCEDURES MANUAL

- Review the entire manual;
- Gather parish staff and volunteers to plan how best to consolidate your parish;
- Set up Liturgical Committee for closing / merging liturgy (11);
- Arrange for communication and public relations (8);
- Make public all dates affecting parish in the bulletin (8);
- Prepare for Archives appointment (24);
- Prepare for Finance appointment (22);
- Prepare for Human Resources appointment (22);
- Provide HR information to all employees (13, 14, 15);
- Provide Reduction in Force information to all employees (19, 22)
- Request and update the Safe Environment Training Report;
- Meet with Archdiocesan Department Property and Assets (4, 6, 7);
- Arrange inventory of sacred goods (by Department of Property and Assets) (6);
- Separate personal items in the rectory by clearly marking them (27, 28);
- Discard anything in the rectory or sacristy that has little remaining use (22);
- Reschedule all weddings to other parishes (9);
- Send Parish Statistical Information to the Chancery (10);
- Contact the Office of Religious Education, Evangelization and Catechesis for school issues (16);

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- Gather all information of parish volunteers and ministries (18);
- Prepare schedule of bank accounts (22);
- Prepare schedule of unpaid bills (22);
- Prepare schedule of service agreements (22);
- Make list of leases / rental agreements (22);
- Make list of leases / rental of parish property (22);
- Make list of organizations using parish property (22);
- Prepare schedule of charge accounts (22);
- Prepare schedule of credit cards (22);
- Pay all charge accounts and credit cards (22);
- Make list of memberships/subscriptions (22);
- Prepare employee listing (22);
- Settle employee tax and benefits issues (22);
- Prepare contact list (22);
- Prepare vendor listing for 1099's (22);
- Prepare vendor checklist (22);
- Make sure mail is forwarded (22);
- Settle all parish cemeteries information (23);
- Organize sacramental, historical records to transfer to Archives (24);

Contact: Chancellor

Archdiocese of Hartford

Fr. Ryan Lerner: Fr.Ryan.Lerner@AOHCT.org

(860) 541- 6491 ext. 154

Purpose of the Parish Policies and Procedures Manual:

To provide a consistent method to do the many and varied tasks related to the Policies and Procedures of parishes.
It is directed to the local leadership of the parishes involved, principally, the pastor, administrator, or pastoral associate.

WHO?

Chancellor's Office/Department of Property and Assets (DPA)
All Offices of the Archdiocesan Administration

PROCESS

After Presbyteral Council

DECREE ISSUED BY ARCHBISHOP BLAIR FOR PARISH CLOSURE OR MERGER WITH THE CLOSURE OF ONE OR MORE PARISHES

SETS IN MOTION

- Notification to Parish, DPA, and relevant AOHCT departments
- If parish realty is to be sold, contact DPA to order appraisal, to list property with commercial broker, and to contact religious goods company
- Parish review of manual
- Priests identify and separate their personal sacred/secular goods
- Formal Inventory of parish sacred /religious goods by designated religious goods company.
- Compile list with supporting documentation of all donor restricted gifts and assets
- Schedule appointments with AOHCT departments
- Conduct inventory of secular goods above \$1,000 (all working appliances remain in place)
- Pastor disposes goods less than \$1,000 (clean house)
- Schedule Closing Ceremony

SCHEDULE/PLAN CLOSING CEREMONY

- Notice is sent to relevant AOHCT offices
- After closing ceremony occurs, parish corporation will be closed after realty is sold
- Merged parish or DPA assumes responsibility for buildings and property at closure regarding:

- Disposition of sacred/religious assets;
- Closing down and securing buildings. This may include board-up, mechanical shut down, and notification of utilities, municipal authorities and Archdiocesan insurance office as appropriate;
- Removal of any items left after sacred and religious goods have been removed.
- No action will be taken regarding disposition of sacred goods or boarding realty until a contract for sale has been fully executed and all conditions in that contract have been satisfied.

TIME FRAME

After all conditions in contract for sale of realty have been satisfied

OFFICIAL CLOSURE

Official closure occurs when the Archbishop issues the Decree Relegating the Property to Profane But Not Sordid Use

Following the official closure

Welcoming or merged parishes will have the opportunity to claim those religious/secular goods not under contract

Removal and transport of remaining items by designated Religious Goods Company

Other archdiocesan parishes/institutions may purchase sacred and religious items at market value as determined by appraisal valuation directly from the designated Religious Goods Company.

Introduction: Letters from Pastors of Consolidated Parishes

This section contains reports / letters from pastors of recently consolidated parishes. The various unique circumstances of the parishes named necessitated changes. The letters serve as testimony to the commitment and cooperation needed to bring about the consolidations and to lead the parishes to new life. The experiences of these pastors were specific to the parishes involved. They are not meant to serve as a model or example of how to consolidate parishes.

St. Augustine Church

30 Caputo Road
North Branford, CT 06471

St. Monica Church

1331 Middletown Avenue
Northford, CT 06472

INTRODUCTION

Pastoral planning at the parochial level requires three key elements: catechesis, clarity, and community. These reflections are meant to be broad and are often common sense. The key themes are meant to be communicated to as many people as possible by as many people as possible. It's not possible to write a step by step guide nor would it be feasible. Better to have a component leader who understands the vision and can lead people to embrace the reality in which we live.

CATECHESIS

A significant obstacle to pastoral planning is the catechesis of the laity. Without a proper understanding of the church it is impossible to move people to a holistic vision for the future. When the laity understand the church is not found primary in a building but in the hierarchical community gathered around Christ, it becomes easier to bring them to consider pastoral planning solutions that reflect the larger good of the community of the local church. The knowledge that we are the living temple which physical church buildings are meant to represent allows the laity to see themselves as part of a larger family served by the particular parish they have come to know and love. This local parish, in the proper sense, is not at odds or in conflict with the larger family of God. As the people of God grows or diminishes, the need and capacity of the local area determines the parochial situation for the good and service of those in that locality. A parish does not exist for its own sake; but for the proclamation of the Gospel, administration of the Sacraments, wherein people can be fed and nourished and thereby be enabled to go out and transform society in all its various aspects: business, culture, medicine, law, education, politics, arts etc.

At the same time, it is vital to stress the teaching that the church is meant to go out and bring those who "have lost the joy of living" and the broken into the embrace of the church. The parish is not meant to be a private club for the few who have made it a home; it is meant to be a home for all people where they can find substance, rest and the experience of God's love.

In order to overcome this obstacle it is necessary that the preaching and teaching from the parish inform people of what it means to be part of the church and how the local parish fits into the structure. Education is a key component to engage people, since it gives them the reasons for why change is necessary. Having meetings with the parish leadership and ensuring they grasp proper ecclesiology goes a long way in transforming the parish culture.

It is important the pastor does not have a merely minimalist attitude with regards to his role as teacher. People come to know the church in large part from their pastor. If the pastor does not collaborate with other parishes, or speak of the larger reality of the church, the people will not see how the parish is ordered to the service of a portion of the people of God which, properly speaking is the church.

CLARITY

The use of past data and operational administration over previous years in order to show stagnation and a decline in growth of the parish community is an important factor in leading people to the realization that something must change. Being forthright with this data and discerning the data together orients people to one conclusion: something must change.

In the face of staggering declines and inability to efficiently be the space where people can adequately grow as the people of God, parishioners often conclude (even when they find it difficult) that the status quo merely means eventual demise. This is often the point when people understand the need for change but may not like it.

Important, too, is allowing people to come up with their own solutions the difficult data presents. Often, these solutions are not practical but they do allow the community to discern various models as they progress to what must be done for the good of the local community and importantly, for the good of the local church.

People in this country pride themselves in their business sense. It is thus easy to show people the very real dollars and sense reality. This shows them the expenses and projected deficits. It reminds them of the declining congregation and the need for evangelization to continue to exist. It also reminds them of the real costs of running a parish. When a community gets so small or unable to have proper staff or maintenance of buildings can the parish truly serve God's people?

We should not be afraid to be completely open and transparent about the situation. The lack of evangelization and thus decline is the fault of the entire local church. When the people own the problem, recognizing they had a hand in the decline, they are less likely to feel like a victim but are emboldened to move forward for future generations.

COMMUNITY

Nothing can be done without the majority behind the vision. With proper education and exposing the relevant data of the situation people are brought to the point they know something must be done. At this moment, it is essential to remind people they are one family of God and no matter what may happen to the church building or their parish territory they will still have a home in the community of the church.

It is ideal if the pastor has been in a community for at least a year so that the people know him. The relationship factor is an obvious one. The pastor ought to bring as many people to the discussion as is realistically possible. In those discussions he should present people with the facts and his opinions. He should educate, inspire and be clear. Open discussion should be allowed and the pastor / parish leadership should be ready to respond in kind. The parish should publish minutes of those meetings via the bulletin and email. The pastor should invite feedback, encourage discussion and be ready to handle the tough questions. People appreciate and understand the role of a father who is looking for what is best for the family; people don't appreciate or identify with some middle-manager who doesn't really care.

Once a decision has been made to alter the parish structure in any way, we cannot stress enough the reality that God is a great gathering force and that it is often the diabolical that seeks to segregate, divide and rouse the feelings of us/them. With clear language people are made to confront their own ideas they may not have really thought through.

The larger community brought forth from other smaller communities must be ready to embrace the new reality as well. Thus, all should be properly catechized and be ready to welcome all who are God's people.

CONCLUSION

This process can be quite rejuvenating for the parish community. Often settled in old bad habits, the turning inward for a time to assess why the parish is where it is provides ample material for a more vibrant future if the pastor / people are prepared to work in service of the Gospel to the glory of the Father. From pastoral planning emerges a new, vibrant reality where people are better capable of proclaiming the gospel but in terms of knowledge as well as urgency.

It goes without saying that during this whole process prayer is a key component. Prayer allows us to ascend the heights of heaven and speak lovingly with our God. True prayer always leads to some good action. If the parish is praying while discerning how best to proclaim the Gospel in service to the people, God will help all those involved in the process to do what must be done, even when difficult.

Reverend Robert L. Turner

St Ambrose Parish

St. Augustine Church: 30 Caputo Road, North Branford, CT 06471

St. Monica Church: 1331 Middletown Ave. Northford, CT 06472.

ARCHDIOCESE OF HARTFORD

860.541.6491



June 13, 2016

The Most Reverend Leonard P. Blair
Archbishop of Hartford
134 Farmington Avenue
Hartford, CT 06105-3784

Your Excellency:

I am writing to request that Immaculate Conception Church in New Hartford and Immaculate Heart of Mary be merged into one parish.

The two churches were formally linked on November 3, 2010. Since that time, each of them has maintained a distinct canonical identity. Sacramental and Financial records have been kept separate. There has been no commingling of funds, though some situations have call for an appropriate sharing of expenses.

The churches are eleven miles apart. Although this distance has presented some challenges, over time many parishioners have grown accustomed to choose the time for Mass that is most convenient with little regard as to where that Mass is celebrated.

In August of 2015, I moved all office functions to the rectory in New Hartford. The result was a more efficient and cost-effective management of staff functions. Each church began to pay a representative proportion of each employee's salary and benefits. The rectory / office in Harwinton continues to be used for meetings. In December 2015 the bulletins for each church were consolidated into one.

In September 2015, I began to address parishioners about movement from "linked" to "merged." Throughout October and November, a group of forty parishioners met four times with Deacon Ernie Scrivani, Director of the Archdiocesan Pastoral Planning Office. These meetings offered an important opportunity for members of each parish to identify the challenges posed by a merger as well as the opportunities. Above all, parishioners were able to realize that each church had important things to offer the other. While much thinking about linking and merging is in terms of "what is lost," the participants in these pastoral planning meetings were able to think in terms of "what is gained."

In February 2016, a group of fourteen parishioners, half from each church, began to meet to write a mission statement, vision statement and strategic goals for what we anticipate to be our new merged parish. The mission and vision statements have been completed. They are included in an attachment to this letter. The committee will continue its work to develop strategic goals. These goals will identify the parish's priorities for the next 3-5 years. These goals are expected to include the areas of: developing parish ministries (current and new), faith formation, evangelization and stewardship.

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During April and May 2016, a two-phase process was used to determine a name to propose to you for the merged parish. For a two-week period, I solicited suggestions. Following this, I met with the merger committee to determine what we felt were the five best suggestions. Then, for a three-week period parishioners could vote. Each parishioner of any age had one vote. The count of votes for each of the five names is included in an attachment to this letter. But, the name that received far more votes than any other was "Our Lady of Hope."

Because of the distance separating the two churches, there are still two religious education programs. However, I am meeting regularly with the respective Directors of Religious Education to develop, based on best practices in the field, one set of goals and procedures. For the past two years, there has been one celebration of the Sacrament of Confirmation. The number of *confirmandi* has been approximately fifty each year.

I have attached to this letter a copy of the 2016 Budget for Immaculate Conception and the Budget for Immaculate Heart of Mary. You will also find among the attachments a copy of the Balance Sheet for each parish as of May 31, 2016. Finally, I have included a Balance Sheet as of May 31, 2016 for the Immaculate Conception Cemetery. These documents conservatively project that in 2016 the merged parish should have total income in the amount of \$806,600. Current assets amount to \$667,460. Once the churches have merged, the Finance Council will look for additional ways to save on expenses and increase income. There are capital improvement issues that will need to be addressed in the future. But, the buildings are properly maintained. There are no unpaid bills at either church. Neither church has an account with stipulations or restrictions as to the use of the funds.

An investigation has been conducted into the patrimony of both parishes. This included an examination of the deeds to all church real estate. There are no covenants, codicils or restrictions on any of the property. A review of the history of the two parishes revealed no indication that a single donor made a significant donation of either funds or real estate with a restriction or stipulation as to future use. This inquiry involved the records of both parishes as well as conversations with trustees and other long-time parishioners. As a result, I conclude that the churches, rectories, other buildings, as well as the growth of each of the parishes were the result of the contributions and gifts of many parishioners from each respective community.

Therefore, I respectfully recommend to Your Excellency that upon consultation with the Presbyteral Council, A Decree of Merger be issued merging Immaculate Conception Church in New Hartford with Immaculate Heart of Mary Church in Harwinton. Further, that the name of the new parish be determined to be "Our Lady of Hope."

This letter is written with the full support of the two Trustees of Immaculate Conception Church and the two Trustees of Immaculate Heart of Mary Parish. In addition, the Finance Councils, Parish Council, Pastoral Planning Committee and an overwhelming number of parishioners join me in supporting this development.

Sincerely yours in Christ,

The Reverend Timothy A. O'Brien
Pastor of Immaculate Conception Church
Pastor of Immaculate Heart of Mary Church

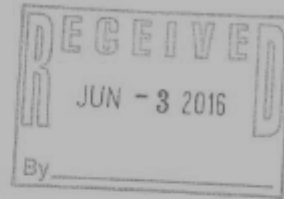
SAINT AEDAN CHURCH
112 Fountain Street
New Haven, CT 06515

SAINT BRENDAN CHURCH
455 Whalley Avenue
New Haven, CT 06511

2

May 1, 2016

The Most Rev. Leonard P. Blair
Archbishop of Hartford
134 Farmington Avenue
Hartford, CT 06105-3784



Dear Archbishop:

At the request of the Trustees, Finance Councils, and parishioners of Saint Aedan and Saint Brendan parishes I write to seek permission for pastoral planning for our churches.

For the past seven years our parishes have begun the process of amalgamation beginning with the merger of our two schools in 2009.

In 2011 we began to hold "Open Forum" meetings to inform parishioners of both parishes what possibilities exist for our parishes linked in 2001. Through power point presentations by the combined St. Aedan-St. Brendan Pastoral council we reviewed twenty years of sacramental, financial, registration and October Count statistics,

In 2013, Sr. Mary Grace Walsh, A.S.C.J., led a "Visioning Meeting" for all parishioners to chart a course for our future.

In 2014, some of the suggestions of that meeting were provided to Mass attendees in the form of an "In Pew Survey."

In 2015 both separate Finance Councils met three times to suggest options for our parishes.

In January 2016 the 11:30AM Mass at St. Brendan was temporarily transferred to St. Aedan church until Easter as a result of heating issues. The response was very positive and endorsed by the parishioners of St. Brendan Parish.

On April 18, 2016 the St. Aedan-St. Brendan Pastoral Council hosts the third "Open Forum" meeting, with Deacon Scrivani in attendance, to consider three options for our immediate future.

The consensus of those present, request for your consideration and implantation the following:

- Saint Brendan Parish and St. Aedan would be merged or amalgamated. Saint Brendan Parish would be subsumed into St. Aedan Parish and only Saint Aedan Parish will remain (analogous to c.121; merger or amalgamation/*extinctive union type II*). The cause for this action is impending insolvency of the parish. There is only about \$37,000 left in all banking accounts. And although there continues two tenant groups, the rental fees are insufficient to meet ordinary parish expenses. It is hoped that this could be accomplished by the close of 2016.
- St. Brendan Parish would enter into a management agreement with the Archdiocese of Hartford whereby the assets and liabilities of St. Brendan Parish would be managed, until all the assets are liquidated (including real estate), and any outstanding indebtedness(including management costs and expenses) are paid. The liquid assets of St. Brendan Parish and rental income accruing to it shall be used to defray the expenses of maintaining the real estate until its liquidation. The net assets would ultimately follow St. Brendan parishioners to St. Aedan-St. Brendan Parish
- This merger or amalgamation would be named: "St. Aedan-St. Brendan Parish." The participants at the 4/18/16 Open Forum Meeting was insistent that this would be the new Title, especially in deference to the parishioners of St. Brendan.
- During the marketing phase of St. Brendan real estate, the church would continue to be used for para-liturgical services (e.g. Rosary, Benediction, Taize, etc.) and funeral Masses. The church hall downstairs would continue in use for meetings and events. Sunday and daily Masses would be celebrated at St. Aedan Church.
- Due diligence has been given to review the origin of this parish (as contained in the archdiocesan archives) not noting any restriction of land use of property. The Archdiocesan attorneys results of a Title search of the property reflects that there are no donor imposed restrictions or other encumbrances on the real estate that would present unique challenges to it being sold. There are few, if any, remaining parishioners who recall the purchase of the property on the corner of Ellsworth and Whalley Avenue. At the 100th anniversary Mass of the founding of the parish (1913) Mr. Biagio Caiafa, former Trustee, shared his recollections of the original church on Carmel Street (where his family lived) and when in 1924 he was baptized in the "new" dedicated church. Mr. Caiafa's funeral Mass was celebrated on April 18, 2016 in St. Brendan Church. Father Lawrence Wrenn, senior priest and former Judicial Vicar of the Archdiocese, a native of St. Brendan parish, was contacted and could not provide any additional information on any restrictions to his knowledge.

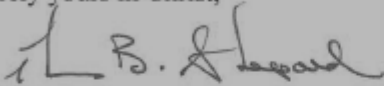
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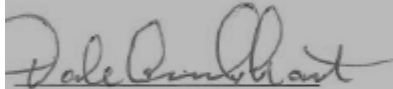
I express my gratitude to you Archbishop for your commitment and leadership in pastoral planning, and I thank Deacon Scrivani, Fr. Makua, and Attorney Karen Casey for their consul and expertise in preparing this proposal for your consideration

If any further clarification is needed please do not hesitate to contact me, or if you prefer I could visit you at the Chancery.

Sincerely yours in Christ,



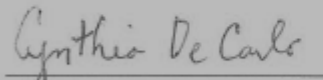
Rev. Thomas B. Shepard
Pastor
St. Aedan and St. Brendan Parishes



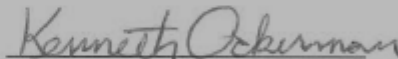
Dale Bruckhart
Trustee
Saint Brendan Parish



Thomas Loricco
Trustee
Saint Brendan Parish



Cynthia DeCarlo
Trustee
Saint Aedan Parish



Kenneth Ackerman
Trustee
Saint Aedan Parish

cc: The Rev. James Shanley
Office of Pastoral Planning

Canonical and Civil Law Implications

Canonical Implication

The universal law of the Church states, “A parish is a certain community of the Christian faithful stably constituted in a particular church, whose pastoral care is entrusted to a pastor as its proper pastor under the authority of the diocesan bishop. §2. It is only for the diocesan bishop to erect, suppress, or alter parishes. He is neither to erect, suppress, nor alter notably parishes, unless he has heard the presbyteral council.

A parish may be altered through modification and / or by changing its canonical status (territorial / personal). There are four types of parish modifications:

- **Extinctive Union** (sometimes known as merger): A and B unite to form C, only C remains (c. 121);
 - **Extinctive Union** (sometimes known as merger, or as amalgamation): A is subsumed into B, only B remains (by analogy to c.121);
 - **Total Division**: A is divided into B and C, only B and C remains (c.122). B and C can either be new or old juridic persons;
 - **Suppression**: A is extinguished; nothing remains (c. 123).
1. Since parishes are communities of the faithful, territorial parishes as a general rule can only be united or divided (c. 121 and 122). Although sometimes personal parishes are truly suppressed (c.123), they are ordinarily united or divided, either in connection to another personal parish or even to a territorial parish. Therefore, parishes are not closed in isolation. When parishes are ‘suppressed’ by competent authority, in reality the still existing communities of Christ’s faithful are actually joined into one or more communities of Christ’s faithful (cf., Letter from the Congregation for the Clergy to Bishop Skylstad, president of the USCCB, Prot. Num., 20060481, July, 2006).
 2. Suppression happens in two stages:
 - a) Parishes are closed (suppressed);
 - b) A suppressed territorial parish is joined to an existing parish or parishes, taking on the juridic personality of the existing parish or parishes;
 - The faithful of a suppressed personal parish are joined to an existing parish or parishes, enjoying the juridic personality of the existing parish or parishes.
 3. The merger of two or more parishes: A merger is a canonical action in which two or more existing parishes come together to form a completely new parish. The emphasis is not on the loss of identity but on coming together as equals to form a completely new parish. The formerly existing parishes no longer exist. In the process of merging, the parishes lose their individual identities and form an entirely new parish.
 4. In both suppression and the merging of parishes, the Christian faithful become members of the resulting territorial or personal parish.
 5. By decree of the Archbishop, the canonical status of parishes may be changed in the following manner:
 - a) A personal parish may become territorial;
 - b) A personal parish may remain a personal parish but be given specific territory to include all Catholics in a designated territory;
 - c) While a territorial parish may keep its territory, it may assume an apostolate (or “pastorate”) for a specific group of the faithful;

- d) The territory of a suppressed parish may be linked to the adjacent territorial parish or further divided and distributed among adjacent parishes.

6. Parish Assets and Liabilities:

- a) Jurisprudence has clearly established that when parishes are modified, the temporal goods are to follow the people:

- When two or more parishes are joined and they form one parish, the temporal goods (i.e. assets), liabilities, and patrimonial rights proper to the original parishes are acquired by the new parish;
- If the parish is divided then an equitable and just division is made concerning the original parish's common and divisible patrimonial goods and rights, taking together its debts and obligations into account;
- If a parish is suppressed, the norms for mergers are applicable; the temporal goods follow the assignment of the Christian faithful.

- b) Suppression and Merging of Parishes:

- Depending on the financial status of the closed or merged parish, through a management agreement with the Archdiocese, the administration of all of the goods and property of the closed or merged parish may temporarily revert for disposition to the Archdiocese as the juridic person superior to the parishes;
- After all financial obligations are determined; the Archdiocese will distribute remaining assets / liabilities of the closed parishes, as appropriate, to the resulting parishes to which the Christian faithful are ascribed;
- The provisions or stipulations of donors and founders must be respected (cf. cc. 121, 122, 123, 1284).

- c) The Merger of two or More Parishes:

- All goods and property formerly belonging to the parish or parishes being merged automatically are transferred to the new parish;
- All existing debts and liabilities automatically pass from the formerly existing parishes to the new parish;
- All ecclesiastical goods and obligations of the formerly existing parishes become those of the new parish;
- The provisions or stipulations of donors and founders must be respected. (cf. cc. 121, 122, 123, 1284).

The principal motivation for modifying or closing a parish is a concern for souls (*Christus Dominus* no. 32) and this modification should be undertaken when the good of the faithful requires it (*Apostolorum Succesores*, no. 214). Jurisprudence acknowledges that the diocesan Bishop can and sometimes should consider the good of the whole diocese in making the decision. Nonetheless, the reason(s) for modifying a particular parish must be relevant to that individual parish, i.e., the cause must be *ad rem*.

Contact: Chancellor's Office
 Archdiocese of Hartford
 Fr. Ryan Lerner: Fr.Ryan.Lerner@AOHCT.org
 (860) 541- 6491 ext. 154

 Fr. George Mukuka: Mukuka@AOHCT.org
 (860) 761- 7482

Civil Law Implication

As noted above, there are essentially four methods under Canon law by which a parish may be transitioned or reformed:

1. Extinctive Union (merger): A and B unite to form C, only C remains (c. 121);
2. Extinctive Union (amalgamation): A is subsumed into B, only B remains (c. 121);
3. Total Division: A is divided into B and C, only B and C remain (c. 122);
4. Suppression: A is extinguished; nothing remains (c. 123).

As each parish has a civil law corporate embodiment, once a decision is made regarding how the parish is to be transformed canonically, the appropriate steps must be followed under the Connecticut General Statutes to transition the parish to a new civil form.

1. The Extinctive Union (merger) as explained above requires the establishment of a new civil parish corporation (Parish C). Once Parish C is established by a corporate filing accepted by the Connecticut Secretary of State, has a tax identification number, is included in *The Official Catholic Directory* (by which it will obtain its tax exempt status), and has registered with the Connecticut Department of Revenue Services and the Connecticut Department of Labor, the net assets of parishes A and B (after payment of all liabilities) may be transferred to parish corporation C, and parish corporations A and B may be dissolved pursuant to civil law.
2. The Extinctive Union (amalgamation) as explained above is more closely aligned with the traditional civil law notion of merger. In a civil law merger, parish corporation A is subsumed into parish corporation B. Parish corporation B accepts all of the liabilities and all of the assets of Parish corporation A. The merger is effectuated by filing a Certificate of Merger with the Connecticut Secretary of State's office. The Internal Revenue Service, Dept. of Labor, and Dept. of Revenue Services should all be notified of the merger.
3. Total Division as explained above requires the civil dissolution of Parish corporation A with the parishioners divided among several other parishes and the net assets divided among the parishes to which the parishioners of Parish A were assigned.
4. Suppression as explained above requires a dissolution of the parish corporation.

The best approach under civil law is to undertake a risk benefit analysis to determine whether it makes more sense to dissolve the civil law corporation (and attempt to limit unasserted claims) or to civilly merge with another parish corporation. Each situation should be reviewed on a case by case basis. The process may take as little as a couple of months for a civil merger and up to three years for a dissolution that is intended to bar claims of pending or future creditors. The dissolution process is considered part of the "winding up of the affairs" of the parish corporation. It will not delay the establishment of a new parish (parish corporation C).

1. Civil Law Merger

After each parish entity has carefully reviewed the assets and liabilities of the other, each files a plan of merger with the Secretary of State. After a decision is made to merge, the total process for a merger could take as little as a few months, depending upon whether the parishes have solid financial records that have been shared with the other that detail each parish's handling of assets and liabilities and depending upon how well organized the parishes' finances are. Each parish should complete the attached worksheets in order to provide the other with a reasonable review of assets and liabilities. All restricted assets and the purposes for which they are to be used must be identified, and all supporting documentation should be reviewed. Donor restricted assets retain their restrictions and must be used for purpose.

The process for merger is as follows:

Before the decision is made to merge with a second parish corporation, a careful assessment of the assets and the liabilities of the corporations should be undertaken. This assessment requires consideration of the parish corporation's history, claims made, and prospective claims that may be made against it, as well as an understanding of potential gifts and bequests that the parish may be promised (to the extent the parish has knowledge of such gifts and bequests).

If a parish corporation that is anticipating restructuring expects to receive substantial gifts through bequests, the parish may preserve these gifts by merging with another parish. (Such gifts and bequests lapse if the parish corporation is dissolved.) Unfortunately, most potential bequests are not known by the parish in advance of a donor's death. Because a merger also preserves all liabilities of the suppressed parish, the parish must consider whether its asserted and unasserted liabilities may equal or exceed the value of its assets and whether dissolution is a better option for it.

Connecticut General Statutes provides that one or more corporations may merge into another corporation if the board of directors of each corporation (the five Corporate Members / Trustees serve that role in a parish corporation) adopts a plan of merger. C.G.S. Section 33-1155. The legal effect of such a merger is set forth in Section 33-1158 of the General Statutes. In pertinent part, that section provides that the following occurs when a merger takes effect:

1. The corporation that is designated in the certificate of merger as the survivor continues or comes into existence, as the case may be;
2. The separate existence of every corporation that is merged into the survivor ceases;
3. All liabilities of each corporation that is merged into the survivor are vested in the survivor
4. All property owned by, and every contract right possessed by, each corporation that merges into the survivor is vested in the survivor without reversion or impairment;
5. The name of the survivor may, but need not be substituted in any pending proceeding for the name of any party to the merger whose separate existence ceased in the merger;
6. The certificate of incorporation of the survivor is amended to the extent provided in the plan of merger;
7. The certificate of incorporation of a survivor that is created by the merger becomes effective [this applies when a new entity is established and entities merge into it];

8. The memberships, if any, of each corporation party which is a party to the merger that are to be converted into memberships of the survivor are converted, and the former members in such membership classes are entitled only to the designation, qualifications, privileges and rights of the class of members to which they are converted, as provided in the certificate of incorporation of the survivor as the same may be amended by the plan of merger.
9. Any devise, bequest, gift or grant, contained in any will or in any other instrument, made before or after the merger, to or for the benefit of any of the merging corporations shall inure to the benefit of the survivor, and so far as is necessary for that purpose, the existence of each merging corporation shall be deemed to continue in and through the survivor.

C.G.S. §33-1158. The effect of merger is highly significant. The surviving corporation assumes not only the debts and liabilities but also the members of the merged corporation. Because the existence of the merged corporation is deemed to continue in the surviving corporation, gifts and bequests given to the merged corporation are to be made to the surviving corporation.

Once each of two parish corporations adopts a plan of merger, they would file the merger documents with the Secretary of the State. The successor parish corporation would assume both the assets and the liabilities of the merged parish corporation. Neither of the parishes is dissolved. Gifts and bequests that take effect in the future to one parish are properly distributable to the successor parish.

2. Civil Law Dissolution

In the event that one of the parishes has excessive existing liabilities (or anticipates claims being asserted in the future), dissolution of the parish corporation may be considered.

The process for dissolution is as follows:

Conn. General Statutes Section 33-264e sets forth the procedure by which parish corporations may be dissolved. It requires that a duly called meeting of the five corporate members be held at which two-thirds of the members present vote that the corporation be dissolved. "After all of its liabilities and obligations have been paid, satisfied and discharged, or adequate provision made therefor, the assets of such religious society or religious corporation shall be distributed in accordance with the provisions of its charter or bylaws, or, if no such provision is made, then in accordance with the vote of its members but only to another religious society, religious corporation or other organization formed for public worship or for ecclesiastical, missionary, charitable or educational purposes" and provided that restricted gifts continue to be restricted and used for purpose. This section does not anticipate that a parish may not have sufficient resources to pay its debts or that unasserted claims may exist against the parish corporation.

In the event that a goal of the parish is to extinguish its pending or as yet unasserted liabilities, the process is more complicated and takes approximately three years.

To obtain fuller protection under the statutes, after satisfying the requirements of Section 33-264e above, the parish should consider also following the process for dissolving a corporation that is set forth in the Non-Stock Corporations Act (Conn. Gen. Stats. Sections 33-1171 through 33-1178). The benefit of these dissolution statutes is that the potential liabilities of the corporation may be limited to the value of the corporation's assets plus available insurance coverage. The drawback of dissolving a parish corporation to limit liability is that it can be a time-consuming process.

Section 33-1172 provides that after a corporation authorizes its dissolution, it may be dissolved by delivering a certificate of dissolution to the Secretary of State. Once a certificate of dissolution is filed, a corporation continues its corporate existence only insofar as it is appropriate to wind up its activities and affairs, including marshaling (collecting) its assets, adopting a plan for distribution of its assets, and discharging or making provision for discharging its liabilities. C.G.S. Section 33-1174. The assets of a corporation in the process of dissolution are to be used to pay the liabilities of the corporation. C.G.S. Section 33-1176. Assets that were received and held by the corporation subject to restrictions on their use (e.g., for charitable, religious, educational, or similar purposes but not held upon a condition requiring return to the donor in the event of dissolution) must be transferred to a corporation engaged in substantially similar activities as those of the dissolving corporation and used for the restricted purpose.

The Connecticut General Statutes governing non-stock corporate dissolutions specifically address the handling of both known and unknown claims against a dissolved corporation. These sections do not specifically reference the priority of certain creditors' claims over others, which are addressed in other statutes. Generally, secured claimants have priority over unsecured creditors. Similarly, payments of wages and employment taxes and payments to taxing authorities take priority over other creditors. If a dissolution occurs of a corporation with insufficient assets to pay all of its creditors, the priority of payments of debts and creditors must be closely reviewed.

Section 33-1177 addresses the disposition of known claims. That section currently provides:

“§ 33-1177. Known claims against dissolved corporation.

1. A dissolved corporation may dispose of the known claims against it by following the procedure described in this section.
2. The dissolved corporation shall notify its known claimants in writing of the dissolution at any time after its effective date. The written notice shall: (1) Describe information that must be included in a claim; (2) provide a mailing address where a claim may be sent; (3) state the deadline, which may not be fewer than one hundred and twenty days from the effective date of the written notice, by which the dissolved corporation must receive the claim; and (4) state that the claim will be barred if not received by the deadline.
3. A claim against the dissolved corporation is barred: (1) If a claimant who was given written notice under subsection (b) of this section does not deliver the claim to the dissolved corporation by the deadline; (2) if a claimant whose claim was rejected by the dissolved corporation does not commence a proceeding to enforce the claim within ninety days from the effective date of the rejection notice.
4. For purposes of this section, "claim" does not include a contingent liability or a claim based on an event occurring after the effective date of dissolution.
5. Nothing in this section shall extend any applicable period of limitation.”

Section 33-1178 addresses unknown claims against dissolved corporations. It currently provides:

“§ 33-1178. Unknown claims against dissolved corporation.

1. A dissolved corporation may also publish notice of its dissolution and request that persons with claims against the corporation present them in accordance with the notice.
2. The notice shall: (1) Be published one time in a newspaper of general circulation in the county where the dissolved corporation's principal office or, if none in this state, its registered office, is or was last located; (2) describe the information that must be included in a claim and provide a mailing address where the claim may be sent; and (3) state that a claim against the corporation will be barred unless a proceeding to enforce the claim is commenced within three years after the publication of the notice.

3. If the dissolved corporation publishes a newspaper notice in accordance with subsection (b) of this section, the claim of each of the following claimants is barred unless the claimant commences a proceeding to enforce the claim against the dissolved corporation within three years after the publication date of the newspaper notice: (1) A claimant who did not receive written notice under section 33-1177; (2) a claimant whose claim was timely sent to the dissolved corporation but not acted on; (3) a claimant whose claim is contingent or based on an event occurring after the effective date of dissolution.
4. A claim that is not barred by subsection (c) of section 33-1177 or subsection (c) of this section may be enforced: (1) Against the dissolved corporation, to the extent of its undistributed assets; or (2) except as provided in subsection 9d) of section 33-1178a, if the assets have been distributed in liquidation to the members of the corporation, against a member of the dissolved corporation to the extent of the member's pro rata share of the claim or the corporate assets distributed to the member in liquidation, whichever is less, but a member's total liability for all claims under this section may not exceed the total amount of assets distributed to him.
5. Nothing in this section shall extend any applicable period of limitation."

Thus, if concerns exist that "known" and "unknown" claims may be substantial or may approximate or exceed the assets of a parish corporation, that corporation should consider taking steps to dissolve and to follow the statutory procedures for handling claims. It should be noted that following all of the steps required to effect a legal dissolution of a parish and discharge liabilities will effectively take a minimum of three years (the period of time allowed holders of unasserted claims to present their claims). After the parish has been dissolved and claims against it have been barred, unasserted claims would be legally terminated, and there would be no outstanding obligations.

If a parish corporation is not concerned about unasserted claims and has sufficient assets to pay all of its creditors, it can file a dissolution certificate, make payment of its debts, and arrange for the proper use of its restricted assets. It need not pursue publication of notices that will commence the running of the statute of limitations to bar claims.

With all dissolutions, the parish corporation must take the steps to wind down its affairs. Those steps include liquidating all assets, paying all liabilities, properly handling restricted assets, and then distributing the net for the benefit of the parish's congregation and for maintaining religious worship and supporting the educational or charitable institutions of that parish. (Conn. Gen. States. Section 33-280, 33-281)

3. Procedural Steps:

Once the parishes make their decisions about how they wish to be transformed, there are a variety of civil law steps that must be followed. The parish corporations have to hold corporate meetings of the five corporate Members / Trustees or execute corporate Consents by which they adopt a plan for their transition. That corporate Consent must be filed with the parish's corporate minute book. The parish must inventory its assets and liabilities, a process that should be ongoing throughout the period when restructuring is being considered. Each parish must recognize that it must maintain and continue to use its realty for religious purposes until the parish has appropriate canonical permissions to alienate it and has a contract in place by which such alienation / sale will occur. Alienations will be subject to certain restrictions as to the use of the property into the future. Prior to the parish entering into a listing agreement with a realtor, it is important to confirm the scope of those restrictions and to advise the realtor of their existence. Until the time that a property is sold, the parish should maintain the buildings intact with objects needed for sacred use in place and maintain the title of the realty in the parish's corporate name; it should heat them; and it should insure them. Parishes must be cognizant of the unique zoning, building code, and environmental issues that may arise if the parish abandons an existing use of a structure by failing to use it for its religious purpose or by advertising it for a different purpose. A list of practical steps that need to be undertaken is included within this manual. These steps

presume that the parish has obtained all appropriate and necessary canon and civil law approvals to move forward with its transition. Karen Jansen Casey will work with the parish to prepare and file the appropriate civil law forms and documents.

Contact:

Karen Jansen Casey
Cooney, Scully and Dowling
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Tel: (860) 527-1141 Fax: (860) 247-5215
kcasey@csd-law.com

Directives for Closing Parishes

Introduction:

The purpose of this section is to provide instruction for closing parishes and buildings. The roles of both the Chancellor's Office and the Department of Property & Assets (DPA) are described below. The directives are stated in general terms and are meant to give clear information on the procedures to be followed throughout the Archdiocese. The Department of Properties and Assets (DPA) will be available to address extraordinary circumstances or particular needs.

Directives:

Once a decree has been issued by the Archbishop to close a parish, the parish Pastor or Administrator, the Archdiocesan Chancellor, and the DPA will be responsible for coordination of the work necessary to close, maintain, empty, and sell the buildings of the parish. The parish, with the assistance of the DPA, will be responsible for the coordination of the inventory removal and redistribution of sacred and religious goods and will be responsible for all work necessary to close and secure the buildings and properties, and all ongoing property management until sale of the property is consummated and legal ownership changes.

As soon as possible following the issuance of the decree to close, pastors / administrators must arrange for an inventory of sacred and religious goods with a representative of a designated religious goods company. Sacred and religious goods that are not the personal property of the priest, and any appliances and secular items belonging to the parish that have a value of \$1,000 or greater, **are not** to be removed from the parish unless specifically approved in writing by the Archdiocesan Chancellor. Secular items of little or no value or items whose cost of disposition likely exceeds their value should be thrown out. The Pastor's / Administrator's responsibility for parish inventory may end with the conclusion of the closing ceremony if the Pastor/Administrator is unable to continue to provide assistance. Please see section 6 for detail.

If requested and approved, the DPA will assume responsibility for the buildings and property following the date of the final Mass and until the property is sold. The post-final Mass duties include the removal of sacred and secular goods, securing and closing down of buildings including board-up and mechanical shutdown as appropriate, notification of municipal authorities as required and utility companies, coordination with Archdiocesan offices, realtors, and others for access as needed, ongoing grounds keeping and periodic checks on the property to assure the ongoing security and integrity of the buildings.

During the due diligence period between the date a Real Estate Purchase and Sale agreement is signed and the date of the sale of the real estate (title transfer), the designated welcoming parishes will be able to remove designated sacred and secular items under the supervision of the DPA and / or its representatives at an agreed upon time. Arrangements for transportation, and all costs associated with transportation and removal of items are the responsibility of the designated welcoming parish. Sacred and religious items left unclaimed at this point will be reconciled to the inventory and removed from the closed parishes by a designated religious goods service as directed by the Pastor / Administrator or the DPA. Items that cannot be reused will be disposed in accord with Canon Law, and disposal will be directed by the Chancellor.

The DPA will assist in ordering appraisals and list the real property with a commercial realtor for marketing and sale.

Approval Process for Sale of Real Estate

In order to sell any of the realty of a parish, including a rectory, convent, school building or church building, the parish's Pastor or Administrator must adhere to the process contained herein.

Sale of realty where the parish will continue to use the church as a worship site **(Example: rectory, school, convent, garage)**

1. The Pastor or Administrator should consult with the Parish Lay Members, Trustees, Parish Council and the Parish Finance Council in connection with the sale of any realty.
2. The Pastor or Administrator must mail a written request to the Archbishop for permission to sell realty owned by the parish corporation. That request must clearly identify and describe the realty to be sold, the reasons the parish has for desiring to sell it, and the position of the Parish Lay Members, Trustees, Parish Council, and Parish Finance Council regarding a sale.
3. If there is a Chapel or an Oratory within the realty either in the rectory, current (or former) convent, the Pastor or Administrator is to request the Archbishop to issue a Decree of Loss of Dedication or Blessing in accordance with canon 1212.
 - a. The sacred and religious goods contained therein must be disposed of in accord with the norms prescribed in canon law.

Only upon receipt of permission to sell realty (sometimes herein "Property"), may the parish Pastor/Administrator undertake the following:

1. The Pastor/Administrator with the assistance of the Department of Property and Assets ("DPA") should order an appraisal of the Property to be sold. Only an Archdiocese of Hartford approved appraiser can be used.
2. The Pastor/Administrator should contact legal counsel (Cooney, Scully and Dowling) to determine the use restrictions to be imposed on the Property.
3. The Pastor/Administrator selects a Real Estate agent and enters into a listing agreement with the assistance of the DPA, which listing agreement must clearly identify the use restrictions to be imposed on the Property post-closing and which listing agreement identifies the personal property to be included in the sale and the fixtures to be excluded from the sale. Only an Archdiocese of Hartford approved realtor can be used.
4. The Pastor/Administrator cooperates with the Real Estate Agent to show the property to prospective purchasers.
5. When the parish receives a Letter of Intent from a potential purchaser, the Pastor/ Administrator will review it with the realtor and with legal counsel. Once approved, legal counsel will prepare a Purchase and Sales Contract to be reviewed by the Pastor/Administrator and the Parish Lay Members, Trustees, Parish Council, and Finance Council and with the DPA.
6. The Contract must contain conditions allowing the parish sufficient time to obtain the approval of:
 - a) the parish Corporate Members (via Corporate Consent to be drafted by legal counsel);
 - b) the Archdiocesan Finance Council for all sales of realty valued at more than \$25,000; and
 - c) the Archdiocesan College of Consultors for all sales of realty valued at more than \$25,000.
7. Once all Seller and Purchaser contractual contingencies have been satisfied, a closing will be held. If the building is a church building, certain religious and sacred items must be removed prior to the transfer of title.

Merger or Closure of a Parish

1. When the parish and the Pastoral Planning Process determine that a parish should be modified by suppression or merger, the Pastor/Administrator in consultation with the parish Lay Members/Trustees, Parish Council, Parish Finance Council [and donors, if applicable] must write a letter to the Archbishop recommending that the parish be suppressed or merged if a decree has not been previously issued.
2. The Archbishop hears the Presbyteral Council for validity.
3. The Archbishop issues a decree of Merger or Suppression, as appropriate.
4. The Decree is then sent to the Pastoral Planning Office, the Finance Office, the Department of Property & Assets (DPA), and legal counsel.
5. The issuance of the Decree of Merger or Suppression initiates the sales process of the parish's Property as detailed above.

Specific conditions apply to the sale of a church building:

Prior to the closing on the sale of the Property, the Archbishop must issue a decree relegating the church building to profane but not sordid use.

For sale of all parish realty, i.e. church building, rectory, school building, convent, etc.:

1. The Archdiocesan Finance Council must approve alienations (transfers of ownership or sales) valued at more than \$25,000 by separate juridic persons (including parishes).
2. The College of Consultors must also approve alienations (transfers of ownership or sales) valued at more than \$25,000 by juridic persons separate from the Archdiocese (including parishes).
3. If the sale is valued at more than \$3.5 million dollars, Rome must also approve the sale.
4. In the interim, the property must continue to be utilized for religious or educational purposes in order to maintain their property tax exempt status.

During the entire Merger or Closure process, the Policies and Procedures Manual is used to manage the many additional tasks required on the part of the parish and the relevant AOHCT offices. Certain steps in the process must not be undertaken until all conditions in the contract for sale of realty have been satisfied. The parish should consult with the DPA and legal counsel regarding these steps.

Contact: Paul Connery,
 Director of Property & Assets
paul.connery@AOHCT.org
 (860) 541-6491 Ext. 161

Directives for Merging Parishes

Introduction:

The purpose of this section is to provide instruction for merging parishes and buildings. The roles of both the Chancellor's Office and the Department of Property & Assets are described below. The directives are stated in general terms and are meant to give clear information on the procedures to be followed throughout the Archdiocese. The Department of Property and Assets (DPA) will be available to address extraordinary circumstances or particular needs.

Directives:

The site of the new parish will be designated by the Archbishop through the modification decree. Use of other churches and other church buildings will be reviewed by Archbishop Blair with the pastor or administrator.

The Pastor or Administrator of the newly formed parish will assume full responsibility for the buildings and property formerly belonging to the individual parishes that have now been merged. If the Pastor or Administrator wishes to delegate responsibility for closure and sale of any property to the Archdiocese due to extraordinary circumstances, he must receive permission from the Archbishop. If permission is granted, Pastors of newly formed parishes will agree in writing via a sign-off sheet for management (see Page 29), which will then be countersigned for approval by Archbishop Blair or his delegate. In addition, the Pastor must enter into a Facilities Management Agreement with the Archdiocese.

A merger requires that all assets and liabilities of the merged parishes pass to the newly formed parish. All expenses to maintain the closed buildings are the responsibility of the newly merged parish. If the newly formed parish is not able to financially support the maintenance of the closed buildings, it must request a loan from the Archdiocese. If responsibility is delegated to the Archdiocese, the Archdiocese will assume total control of the closure, sale, and redistribution of assets. The net assets will be used to satisfy existing or incurred liabilities (e.g. debt, loans due to the Archdiocese, closing expenses (including management fees) as noted in the Facilities Management Agreement). An accounting of funds will be provided to the pastor, and to the Archdiocese, at the completion of the process.

As soon as possible following the issuance of the decree to merge, pastors / administrators must arrange for an inventory of sacred and religious goods with a representative of a designated religious goods company. Sacred and religious goods that are not the personal property of the priest, appliances, and any secular items belonging to the parish that have a value of \$1,000 or greater, **are not** to be removed from the parish unless specifically approved in writing by the Archdiocesan Chancellor.

Other Issues

Directives and procedures for merged parishes in the areas of communication, rescheduling of sacraments, employment, volunteer ministries, finance office procedures, and records retention can be found in other sections of this Policies and Procedures Manual.

PARISH MERGER

PROPERTY RESPONSIBILITY SIGN-OFF SHEET

As provided in Canon and civil law, in the case of a merger, all assets and liabilities of the merged parishes pass to the newly formed parish. If, due to extraordinary circumstances, the Pastor or Administrator of the newly formed parish cannot assume full responsibility for all the buildings and property formerly belonging to the individual parishes that have now merged, he must receive the approval of the Archbishop or his designee to delegate responsibility for closure and sale to the Archdiocese. In addition, the Pastor must enter into a Facilities Management Agreement with the Archdiocese.

If the newly formed parish is not able to financially support the maintenance of the closed buildings, it may request a loan from the Archdiocese, if responsibility is delegated to the Archdiocese, the Archdiocese will assume total control of the closure, sale, and distribution of net assets. Net assets will first be applied to pay existing or incurred liabilities (e.g. debt, loans due to the Archdiocese, closing expenses (including management fees) as noted in the Facilities Management Agreement) for the properties. Accounting of funds will be provided to the pastor, and to the Archdiocese through the yearly financial report, at the completion of the process.

At the conclusion of all real estate transactions, remaining balances, along with a strict accounting of funds, will be provided to the newly formed parish.

PROPERTY RESPONSIBILITY SIGN-OFF SHEET
FOR PASTORS / ADMINISTRATORS OF NEWLY FORMED PARISHES REGARDING
RESPONSIBILITY FOR THE MANAGEMENT OF ASSETS OF A CLOSED PARISH

This serves as a request to **delegate** to the Archdiocese of Hartford all responsibility for ongoing property management and disposition of the former parish properties that have been closed as a result of this merger.

Signed:

Approved:

 Pastor

 + Most Rev. Leonard P. Blair
 Archbishop of Hartford

 Date

 Date

 Parish

List properties by name, function, and location for which you seek to delegate responsibility for ongoing management:

Contact:

Chancellor's Office
 Archdiocese of Hartford
 Fr. Ryan Lerner: Fr.Lerner@AOHCT.org
 (860) 541-6491 ext. 154

Fr. George Mukuka: Fr.Mukuka@AOHCT.org
 (860) 761-7482

Sacred and Religious Goods

Introduction:

The Archbishop is the ultimate steward of parish property. In the absence of a document expressing an explicit will of a donor for the use of a gift, he has the authority to decide or delegate the appropriate parties to decide on disposition of church goods. Sacred goods are intrinsically connected with worship and therefore have a value which above merely monetary or emotional consideration.

Generally, a donor who has given an item to a parish has given it unconditionally. Any power to determine the future of such item has passed to the parish or its successor entity. No one (heir to donor, etc.) can exercise any rights over said object.

Sacred goods are those items directly involved with the Liturgy, namely, tabernacles, chalices, monstrances, patens, vestments, altar linens, stations of the cross, etc. These may not become the property of individuals. Religious goods include those items readily identifiable as used in the church.

For some objects of great artistic, material, cultural, or historical value, judgments will be made regarding their appropriate placement. This decision will take into consideration such factors as best use, issues regarding parishioners and parish sensitivities, any ethnic or cultural factors (e.g. mother church, church of same ethnicity), needs of the missions etc. Because of its great value, stained glass will be considered in the category of sacred goods. All decisions regarding sacred and religious goods will be directed by the Chancellor in accord with Canon Law.

Regarding disposal of surplus items, all efforts will be made to place said items in an ecclesiastical setting. No item having a sacred character is to be sold at auction or otherwise put in a situation where misuse is possible (e.g. monstrance becoming a night club decoration). Items deemed worn or damaged, and inappropriate for future use, will be destroyed as provided by Canon Law. Appropriate detailed records will be kept in the Archives to document the decision-making and disposition of these items.

The Chancellor and DPA will be available to assist the Pastor / Administrator in decisions regarding sacred and religious goods.

Directives:

Issuance of Closing / Merging Decree by Archbishop Blair sets in motion the following activities:

- Notification is sent to Parish, DPA, Human Resources, Finance, Archbishop's Staff, AOHCT departments, Archives, legal counsel, and other appropriate personnel.
- If parish realty is to be sold, Pastor / Administrator should contact DPA to order an appraisal from an approved real estate appraiser, and to list the property with an approved real estate broker.
- Parish will review the contents of Policies and Procedures Manual.
- Priests of the parish will identify and separate personal vs. parish owned sacred / religious goods prior to formal inventory.
- Pastor / Administrator will arrange for formal inventory of sacred and religious goods with DPA and designated Religious Goods Company as soon as possible after decree is issued.
- Inventory / Valuation spreadsheet will be created with descriptions and photos, etc. of items, and critical dates for generation of appropriate notices.
- Representatives from DPA, Human Resources, Finance, Education, Parish Life, Clergy & Religious, etc., schedule appointments with Pastor / Staff as necessary and appropriate.

- Parish will complete list with supporting documentation of all donor restricted gifts and assets.
- Parish will schedule appointments with AOHCT departments and contact legal counsel.
- Parish will conduct inventory of secular goods above \$1,000 (all working appliances remain in place).
- Pastor / Administrator responsible for disposition of secular goods with value less than \$1,000. Parish will dispose of all secular items of little or no value prior to closing (i.e. clean house).
- Parish will schedule / plan closing ceremony.

Last Mass - Closing Ceremony / Parish facility closure:

- When the closing ceremony is scheduled a notice will be sent to all appropriate personnel as above.
- After all conditions in contract for sale of realty have been satisfied, official closure occurs when the Archbishop issues the Decree Relegating the Property to Profane but not Sordid Use.
- Depending on whether the decree is a closure or merger, the Pastor of the newly merged Parish and / or DPA assumes responsibility for the buildings and property at closure. Duties include: coordination with DPA, the designated religious goods company, and others regarding disposition of sacred / religious assets; closing down and securing buildings to include board-up, mechanical shut down and notification of utilities and municipal authorities and Archdiocesan insurance office as appropriate; removal of any items left after sacred and religious goods have been removed.
- Within the first two weeks following closure, newly merged parish or the welcoming parishes in the event of a closure have first opportunity to claim sacred or religious items from the closed parish. Costs for removal and transportation will be borne by the claimant. Removal date and time must be coordinated with DPA and Designated religious goods company.
- Following the final pick-up of claimed items, the inventory of remaining items will be reconciled prior to transfer of remaining items to the designated religious goods company for storage, resale or destruction, as approved by the Chancellor.
- Other archdiocesan parishes / institutions may purchase sacred and religious items at market value as determined by appraisal valuation. Those interested will be directed to website of the designated religious goods company to view and purchase items. Costs for transportation to be borne by claimant
- Depending on whether the decree is a closure or merger, the Pastor of the newly merged Parish and / or DPA will provide ongoing property management of former parish properties until they are sold and title is transferred to new owner. Duties shall include: Coordination with utilities for meter readings and other legitimate requests for access to property / buildings including realtor showings as appropriate, grounds care, and periodic checks on property to assure ongoing building integrity.

Contact: Chancellor's Office
Archdiocese of Hartford
Fr. Ryan Lerner: Fr.Lerner@AOHCT.org
(860) 541- 6491 ext. 154

Fr. George Mukuka: Fr.Mukuka@AOHCT.org
(860) 761-7482

Paul Connery: paul.connery@aohct.org
Department of Property and Assets
(860) 541-6491 Ext. 161

Facilities Management and Property Issues

Introduction:

The purpose of this section is to outline the many aspects of facilities management and property issues that require deliberate attention.

The Archdiocesan Department of Property & Assets (DPA) will be available to assist in decisions regarding facilities management and property issues.

Once the Merging or Closing Decree has been issued by the Archbishop, the pastor / administrator will be contacted by the DPA Team to set up a meeting with the pastor, his business manager and maintenance person in order to discuss particulars of the parish buildings and to assist the parish in preparing the facility for closing. The following is a list of items to be addressed. The pastors, administrators, pastoral associates and staffs hold very valuable information that will be needed as part of the process. In addition, a Facilities Assessment will be completed to gather information on the buildings to determine the procedures required to close the buildings.

In the event of a merged parish vs. a closed parish, all property and facilities will remain under the direct responsibility of the pastor / administrator of the new Parish unless delegated to the Archdiocese. DPA will, however, be available to assist the pastor / administrator with facilities issues. The following list should be utilized as a guideline for the pastor / administrator of the merged Parish when dealing with the closed facilities. All expenses related to closings and mergers will be the responsibility of the closed or merged Parish.

Any one of the individuals above may be contacted for any and all facilities issues that the parish may have.

CONTENTS OF BUILDING

1. Personal Inventory – Following notification of the Parish closing, all clergy residing in the Parish Rectory must take an inventory of their personal possessions. This needs to be completed prior to the buildings and sacred objects inventory.
2. Sacred Objects Inventory – An inventory of sacred objects will be coordinated between the Pastor and the designated religious goods company. A copy of the inventory listing will be provided to the pastor. As soon as feasible following the final Mass, a representative of DPA will meet with the pastor / administrator to change the parish campus door locks. At that point, the responsibility for the property is still the responsibility of the pastor of the newly merged parish or, in the event of a closing, the DPA Team.
3. Non Sacred Goods Inventory – An inventory of all appliances / office equipment / furniture / other items (with an estimated value in excess of \$1000) will be arranged by the pastor and the DPA Team. An assessment will be done as to which items may be easily disassembled and sold quickly or distributed for re-use. All working appliances are to remain as part of the realty.

4. Utilities
 - a) Decide if heat system to be left on or turned off.
 - b) If heat is to remain on, the boiler feed system will require water.
 - c) If a sprinkler system exists, the feed for water should be able to be left on without other water systems.
 - d) Drain toilets / sinks and add antifreeze.
 - e) If heat is to be shut off, gas service should be shut off - utility notified.
 - f) Hot water heater should be shut off – both electrically and at the water fuel valve.
 - g) Phone lines, except alarms, shall be disconnected by notifying utility (including: lines for faxes & internet connection).
 - h) Cable lines for TV's and internet should be disconnected and utility notified.
5. Grounds
 - a) List arrangements for snow removal.
 - b) List arrangements for lawn maintenance including: mowing, general clean-up & hedge clipping, tree trimming.
 - c) List arrangements for maintenance of exterior lights.
6. Organ / Piano
 - a) Establish whether pipe organ is in operating condition. Is it valuable and worth moving to be used elsewhere or sold? Provide whatever information is available about the organ.
 - b) Establish whether Electronic organ is in operating condition. Decide if it is valuable and worth moving to be used elsewhere or sold. Provide whatever information is available about the organ.
 - c) List condition of piano. Decide if it is valuable and worth moving to be used elsewhere or sold. Provide whatever information is available.
7. Appliances / Office Equipment
 - a) List all items on inventory list with a value greater than \$1000 including: refrigerators, freezers, washers, driers, dishwashers, TV's, VCR's, DVD's, Blu-Rays, Xerox machines, fax machines, other copiers, furniture, etc., should be listed with size, make and condition, and maintenance warranties. All working and installed appliances such as stove, refrigerators are to remain as part of the realty. Identify whether equipment is owned by parish or leased by parish.
 - b) If the appliance or piece of equipment is not operational it should be discarded.

ELECTRICAL

1. Essential circuits – circuits such as sump pumps, heater, alarms, emergency lighting, outdoor lighting, dehumidifiers, A/C, fire protection equipment should be left on.
2. Non-essential circuits such as main lighting, narthex lighting, font water circulators, unused equipment, etc., should be left on.
3. Lighting needed for safety, such as in the boiler room, stairways, exterior, etc., should have their circuits left on so when switch is activated they will turn on.

MECHANICAL

1. Heating System
 - a) Fuel (gas or Electric)
 - b) Type (hot water, steam, forced air)
 - c) Remaining on (Yes / No)
 - d) Thermostats set at 45-50 degrees
 - e) Water feed to system On / Off
 - f) Schedule for checking and maintaining
 - g) Zone valves checked and operational
 - h) Alarms connected – local / remote
 - i) Service contract for maintenance / servicing
2. Air Conditioning System
 - a) Type – water, cooled air
 - b) Air handling system that also furnishes heat
 - c) Dampers secured
 - d) Intake covered
 - e) Exhaust covered (not to boiler room)

PLUMBING AND WATER

1. Domestic supply will be turned off unless water is required for heat system or sprinklers;
2. Toilets / sinks drained and antifreeze added;
3. Maintain any flood alarms, sump pumps, or dehumidifiers in use and install as needed;
4. Maintain sprinkler system & sprinkler alarms;
5. DPA Team will provide visual inspection and will arrange for routine maintenance;
6. Exterior spigots turned off and drained.

GENERAL PROPERTY INFORMATION

1. Please provide materials in your possession concerning:
 - a) Building architectural plan
 - b) Plot or property plans
 - c) Deeds
2. Name of each parish building, and its legal address, as recognized by the municipal authorities.

3. Please provide the names and contact information of those people most familiar with the operation of the parish property.
4. List any unresolved disputes or issues with the abutters about fences, property lines, parking rights or any similar items.
5. List shared real estate, drive way, etc.

Contact:

Paul Connery:
Director of Property & Assets
paul.connery@aohct.org
(860) 541-6491 Ext. 161

Communication and Public Relations

Prior to contact with the media, a parish should prepare itself by:

1. Being well acquainted with the Office of Pastoral Planning website at: stewardsoftomorrow.org.
2. Reviewing the Pastoral Newsletter, which is published on the website at: stewardsfortomorrow.org
3. Doing a local news search of your deaneries for media coverage.
4. Being well acquainted with Archbishop Leonard Blair's media protocol available through the Office of Communications.
5. Identifying parish spokesperson among its leadership. If the pastor is unavailable, he needs to designate someone to speak on behalf of the parish. Once the person is appointed, he / she needs to be identified to the parish staff.

Upon being contacted by the Media:

1. Immediately contact Communications Director Maria Zone upon receiving a media inquiry:
(860) 541-6491 – office
(860) 335-0836 – cell
Maria.Zone@aohct.org
2. If Maria is not available contact Vicar for Pastoral Planning Rev. James Shanley:
(860) 541-6491 – office
(860) 712-6170 – cell
Fr.Shanley@aohct.org
3. Work with the Office of Pastoral Planning and the Office of Communications Department to create a comprehensive communication plan for the parish community and your geographic location. Elements of this plan may include, but will not be limited to, town hall meetings, small group gatherings, bulletin announcements, letters to the editor, the parish website, FAQs, background and fact sheets, etc. The purpose of these public relations tactics will be the following:
 - a) Lead and manage the message;
 - b) Help people recognize and understand the reason for change;
 - c) Stay focused on mission;
 - d) Control rumors through proactive messaging;
 - e) Communicate with all audiences;
 - f) Recognize and respect all constituencies;
 - g) Protect against incorrect reporting by media as the result of those who have issues with the process.

Implementing Media Strategy:

By coordinating the message jointly with the Offices of Pastoral Planning and Office of Communications, the Parish pastor or his designee responds to the media's deadline with agreed upon, approved messaging. This may take the form of an on-the-record, on-camera, phone or in-person interview, press release, or approved media statement.

Media Follow-up

Consult Office of Communications, if media follow-up is necessary. For example, if overage includes inaccuracies or misquotes, or if coverage could be complemented by further information.

Contact: Maria Zone
Communications Director
(860) 541-6491 – office
(860) 335-0836 – cell
Maria.Zone@aohct.org

Fr. James Shanley
Vicar for Pastoral Planning
(860) 541-6491 – office
(860) 712-6170 – cell
Fr.Shanley@aohct.org

Rescheduling Marriage

1. Are there marriages scheduled for dates after the scheduled closing of the parish? If yes, please list the names of the couples and the planned date.

_____ Yes _____ No

2. If yes, please list the names of the couples and the planned date.
3. Have arrangements for these marriages been made with the new or receiving parish? If this has not been done, take the following steps:
 - a. Meet with the couple to discuss the preferred location for the wedding - determine at this meeting if there is flexibility regarding time;
 - b. Contact the new or receiving parish or the preferred parish to determine the availability of the desired date and time;
 - c. If this is not possible, speak again with the couple to consider other options;
 - d. Schedule the church, date, time, and celebrant.
4. Complete a Marriage Rescheduling Form for each couple.
5. Prior to the date of the closing or merger of the parish, attach the Marriage Rescheduling Form to the Marriage Preparation File and transfer these to the parish where the wedding will be celebrated.

Contact: Office of Family Life - Archdiocese of Hartford
 467 Bloomfield Ave, Bloomfield, CT 06002-2999
 Phone: (860) 242-5573
 Fax: (860) 242-0367

Marriage Rescheduling Form

This form should be filled out by the pastor or parish staff member who is responsible for preparing couples for marriage and making arrangements for the sacramental celebration of the wedding. The completed form should be attached to the couple's Marriage Preparation File and the file transferred to the parish where the wedding will be celebrated, after the marriage preparation of the couple is completed. Two copies of the form should be made immediately: one mailed to the parish where the wedding will be held (to confirm it on their calendar) and one copy given to the couple.

Names of the couple: _____

Contact Information

Name: _____

Address: _____

Phone(s): _____

Email(s): _____

New Location of Wedding: _____

Date and Time of Wedding: _____

Name of Celebrant: _____

Confirmation of the Rescheduling of this Wedding:

Person completing this Form: _____

Parish: _____

Phone / Email: _____

Name of the Person I spoke with at the parish where the wedding will be held: _____

- _____ Gave copy of the form to the couple
- _____ Mailed copy of the form to the parish
- _____ Mailed copy of the form to the Office of Family Life

Parish Statistical Information

1. Parish Sacramental Data

The Chancery will continue to gather information on parish sacramental activity for all of the parishes in the Archdiocese using the Annual General Statistical Report in order to establish a reliable baseline for future trends after reconfiguration is completed.

The data contained in these Reports will be shared with parishes that are involved in a merger in order to assist in the establishment of a reliable baseline of future trends.

2. Records

For those parishes that are scheduled to merge, the Chancery will provide oversight with regard to the sacramental registers and marriage files of the parishes involved in the merger to assure the appropriate and orderly transfer of these ecclesiastical documents.

For those parishes that are scheduled to close, the Chancery will provide oversight with regard to the sacramental registers and marriage files to assure that these ecclesiastical documents are transferred to the Archives and secured as required by canon law.

Contact: Chancellor
 Archdiocese of Hartford
 Fr. Ryan Lerner
 Fr.Lerner@AOHCT.org
 (860) 541- 6491 ext. 154

Database

The Archbishop's Annual Appeal Office continuously maintains a database for all registered households to be used for fundraising purposes as well as mailings of *The Catholic Transcript*. Each registered family is associated with a parish. It is imperative that parish databases are accurately maintained. Updates which must be made to the Appeal Office include parishioner additions, parishioner deletions, and changes to the parishioner's information.

In the event of a parish closing, all parishioners will be reassigned to a designated parish by the Archdiocese. The Appeal Office needs to be alerted as to which parish these parishioners will now be registered. Parishes need to send a letter to alert parishioners as to which parish they are now registered. If parishioners would like to make any changes, they can contact the Appeal Office or any Parish Office.

In the event of two parishes merging, all parishioner names will be combined into the new parish community. If a new parish community name is used, then the parishioners will be assigned to the newly named parish. The Appeal Office needs to be alerted as to which parish these parishioners will now be registered, including the new name of the parish community. Parishes need to send a letter to alert parishioners as to which parish they are now registered. If parishioners would like to make any changes, they can contact the Appeal Office or any Parish Office.

Archbishop's Annual Appeal Parish Goals:

The Archbishop's Annual Appeal has assigned a fundraising goal to each parish as part of the Overall Archdiocesan Goal.

In the event of a parish closing, the parish's goal will be added to the goal of the parish designated by the Archdiocese as the welcoming parish. The Appeal Office needs to be alerted as to which parish to shift the goal. If this is mid-year, the funds raised to date will also be credited to the determined parish.

In the event of two parishes merging, goals will be combined to establish one new goal for the new parish community. The Appeal Office needs to be alerted as to which parish to shift the goal. If this is mid-year, the funds raised to date will also be combined and reflected in the new parish community's totals.

Contact: Laurie DeLuca
Office of the Chancellor
Archdiocese of Hartford
134 Farmington Avenue
Hartford, Connecticut 06105-3784
Phone: (860) 541-6491
Fax: (860) 578-1444
laurie.deluca@aohct.org

ARCHDIOCESE OF HARTFORD

860.541.6491

Tina Poet – Appeal Coordinator
Archbishop's Annual Appeal
P.O. Box 28
Hartford, CT 06141-0028
Appeal Office Phone: 800-781-2550
Fax: (860)-828-7400
tinap@letterconcepts.com

Letter Concepts
33 Massirio Drive, Berlin, CT 06037
(860) 828-5101

Liturgical Issues

The final Mass in a parish church is an important moment for the faithful of the parish.

In addition to marking the closing of the parish with this final Mass, it may be appropriate for members of the parish to gather for prayer and fellowship at other times before the final Mass to remember the life they have shared together in that place. This is optional and may take various forms, such as:

- Evening Prayer (see www.liturgyofthehours.org or www.ebreviary.com)
- Solemn Exposition of the Holy Eucharist
- Parish Mission (themes of change, trust, hope, faith)

These gatherings may include:

- allowing a time for parishioners to come to the Church for private prayer;
- reading the names of the people who received the sacraments in the parish;
- inviting the faithful to bring pictures of themselves as they celebrated the various sacraments at the parish and dedicating a bulletin board to each sacrament;
- displaying photos of past parish groups (i.e. finance committee, choir, parish council, etc.) and gatherings (i.e. parish picnics, bazaars, etc.);
- reading the names of current parishioners;
- inviting clergy, religious, (former principals and teachers if a school was associated with the parish) and former parishioners to return for one last gathering.

Prayer is the center and the lifeblood of Christian life offered in response to our every joy and sorrow. The parish restructuring process is no exception. The Liturgical Commission, in collaboration with the Office of Pastoral Planning, has created eight prayer services (**Appendix 1** found at end of this Section 11) that may assist your parish community during this time of transition:

Praying Through Disbelief, Anxiety and Hurt
Praying for Acceptance and Healing
Praying Through Times of Transition
Praying for Hope and Trust in God's Faithfulness
Honoring Our Traditions, People and Treasures
Praying with Praise and Thanksgiving
Looking Forward with Hope (for merged parishes)
Looking Forward with Hope (for stand-alone parishes)

These prayer services reflect various characteristics. First, **they respond to practical needs** on the parish level. Parishioners may react in a variety of ways to the restructuring announcement. As they anticipate a new reality, parishioners may experience strong emotions. Communal prayer can provide an environment to express and process feelings of anxiety, fear, and denial. Additional services can offer a path toward building hope, trust, and acceptance of an uncertain future while honoring and revering a shared past. Second, **they are relevant**. The prayer services were prepared with a sensitivity toward a variety of parish responses to restructuring. Third, they **are flexible** and may be used in many ways.

The following practical points will assist parish teams in providing effective prayer experiences for their respective communities:

1. **Identify your need or goal** — Choose the service(s) that you think will work best for your community now and throughout the transition process.
2. **Look for opportunities** — Parish groups may have varying needs and may be available at differing times. Ministry groups, committee meetings, small Christian communities can gather to pray. The entire parish community might gather.
3. **Discern who leads** — To provide the greatest flexibility, services are designed to be led by a priest, deacon, or experienced lay leader. The pastor may not always be available. Prayer should happen anyway.
4. **Prepare carefully** — Services are designed in a simple two-page, 8 ½" X 11" format. They can be printed easily and used immediately. Options for readings and music are noted. Notify the designated contact person for a Microsoft Publisher or Word version allowing you to modify the service further to better suit your needs.
5. **Engage the senses** — Prayer is more than words. Whether you gather in church or in a meeting room, establish a reflective mood and environment. Light a candle; enthrone a Bible; prepare a vase of flowers. Use music — even unaccompanied — to set the mood and draw people together. Leave sufficient time for silence, especially during the period of reflection. A time of sharing among individuals, small groups or entire communities, is also a valuable component.

LITURGICAL CELEBRATION TO MARK THE FORMAL CLOSING OF A PARISH

The time and place for the final celebration is Sunday Mass because the ecclesial dimension of the Eucharist is expressed most especially on the day when the whole community comes together to commemorate the Lord's resurrection.

Every effort should be made to have a single celebration at which the entire parish can gather together for the final Mass. The Mass to mark the formal closure of a parish should be as inclusive of the whole parish community as possible. If this is not possible, the closing ritual that follows may be repeated at another parish Mass the weekend of the closing of the parish.

Archbishop Blair has established the following parameters for the closing Mass:

- The Mass texts of the day are used;
- The readings of the day are used;
- An optional concluding ceremony may follow the Prayer After Communion;
- If a Bishop is the celebrant of this Mass, the following liturgy information form must be completed and sent to him with a draft copy of the worship aid (if used). Once the Bishop-Celebrant has reviewed the worship aid and noted any changes, the parish may proceed to print the worship aid.

The Worship Aid

If a Worship Aid is created for this Mass, the following information will be of assistance to parishes:

- Prepare a worship aid that will also serve as a commemorative of the occasion. Choose hymns that will be familiar to several generations of parishioners. Proper copyright permission must be sought from the copyright holders of all music and texts printed therein (including texts of the Mass and texts of hymns, psalms, and songs);
- The contents of the worship aid should be limited to:
 - A brief history of the parish (no longer than 1 page) optional;
 - Identifying the parts of the Mass and providing music for the assembly's sung participation;
- It is not necessary to print the texts of the presidential prayers, the readings, the dialogues of the assembly in the worship aid;
- The best guide to the appropriate contents for a worship aid is found in those produced for archdiocesan celebrations (Chrism Mass, Ordinations, etc.).

Additional Suggestions

- Invite former pastors or parochial vicars to concelebrate;
- Have people representing various age groups to carry out sacred objects, such as the cross, statue, or altar cloth. The priest celebrant will carry out the Blessed Sacrament;
- Those entrusted with planning this celebration might consider the use of the Rite of Blessing and Sprinkling Holy Water, a procession with the *Book of Gospels*, and Holy Communion under Both Kinds. These elements highlight the essential bonds of communion within the parish – Baptism, the proclamation of the Word of God, and participation in the saving death and resurrection of the Lord in the Mystery of the Eucharist.

Introduction after the Greeting

After the greeting, the priest celebrant may possibly speak to the assembly in these or similar words:

We gather today to give thanks to God for the many years that (NAME) Parish has served us as a community of faith. While there is sadness in the closing of this parish, we can be grateful for all that it has provided us.

Although this is our last celebration in (NAME) Parish, we will continue to hear God's Word and share the Eucharist as a people of faith. In a spirit of gratitude, let us bring to this celebration of the Mass the memories of all the many blessings and graces we have received in this parish and trust in the providence of God as we soon become members of a new parish.

Rite for the Blessing and Sprinkling of Water

This rite is found in Appendix II of the Roman Missal.

Sample Petitions to be included in the Universal Prayer

For the pastors, priests, and deacons, religious and lay staff who has faithfully served in this parish in so many ways throughout its history, let us pray to the Lord...

For all members of our parish community, both past and present, who daily shared the Good News of Jesus Christ with a world in need of it, let us pray to the Lord...

For all our benefactors and for all who so generously gave of their time, talent, and treasure to benefit our parish, the diocesan Church, the local community, and the world, let us pray to the Lord...

For all those who have served as preachers and catechists and have shared the word of God - in our worship, in the classroom, and in the missions, let us pray to the Lord...

For all who have served in this place as liturgical ministers – as priests, deacons, servers, lectors, musicians, choristers and cantors, extraordinary ministers of Holy Communion, ushers, and greeters, and who enabled each of us to participate more fully in our liturgical celebrations, let us pray to the Lord...

For those who built this building with the works of their hands, for those who maintained it, and for those who, each season, created liturgical environments, let us pray to the Lord...

For all those who come to know Jesus in our midst and who, as infants or adults, have been welcomed here into the Body of Christ, let us pray to the Lord...

For those who were joined in marriage in this church and for all the married couples who modeled for us the sacrificial love of the marriage covenant, let us pray to the Lord...

For the vocations to the priesthood and consecrated life that were nurtured from our parish community for the good of the local and universal Church, let us pray to the Lord...

For our beloved dead, young and old, whose funerals we celebrated here and whom we have relied upon in the communion of saints, let us pray to the Lord...

For ourselves, the members of (NAME) Parish, that the gifts and graces we have received here in this holy place will guide us as we become members of a new community of faith, let us pray to the Lord...

Possible Ceremony to follow the Dismissal

If possible, have all join in a procession of remembering.

Adapt the route according to the layout of the building, but culminate with the altar.

A song may accompany the procession.

If a procession is not possible due to the nature of the building, invite all to turn in the direction of the prayer and sing between each invocation of thanksgiving.

Cross and candle bearers lead the procession to the various areas.

Priest: My brothers and sisters, now that this Mass has ended and we leave this church to become parishioners of a new parish, we must turn to the Father in thanksgiving for the many ways the sacred images and places in this building have formed us as the Body of Christ and have led us to deeper grasp of the presence of God in our lives.

At the Image or Statue of the Parish's Patron

Priest: Let us remember our parish patron (NAME) and the many blessings we have received through his / her intercession.

Pause for a moment of silence.

Priest: We thank you for the inspiration and spiritual patronage bestowed on us through our devotion to (NAME OF PATRON).

All: Blessed be God forever!

At the Shrine of Our Lady

Priest: Let us remember the generations of prayer and devotion that this sacred image of Mary has inspired over the years.

Pause for a moment of silence.

Priest: We thank you for the comfort and the consolation we have received through the intercession of Mary, the Mother of God and our Mother.

All: Blessed be God forever!

At the Twelfth Station of the Cross

Priest: Let us remember those who walked these stations of prayer and devotion over the years.

Pause for a moment of silence.

Priest: The twelfth station of Christ's Way of the Cross, "Jesus Dies on the Cross." We adore you O Christ, and we bless you, because by your holy cross, you have redeemed the world.

All: Blessed be God forever!

At the Font

Priest: Let us remember the baptisms celebrated here.

Pause for a moment of silence.

Priest: We thank you for the life of faith given to all who have passed through the waters of new life at this font.

All: Blessed be God forever!

At the Confessional or Reconciliation Chapel

Priest: Let us remember the times when we have been forgiven, comforted, consoled in the sacrament of penance.

Pause for a moment of silence.

Priest: We thank you for the healing and reconciling love that has been given through the Sacrament of Penance and Reconciliation.

All: Blessed be God forever!

At the Ambo

Priest: Let us remember the power of God's word proclaimed here in scripture and in preaching.

Pause for a moment of silence.

Priest: We thank you for your holy Word. May it always echo in our hearts and lives.

All: Blessed be God forever!

At the Altar

Priest: Let us remember the times we have gathered for the sacred banquet:
the Triduum kept each year,
the Sundays on which we worshiped faithfully,
the First Communion celebrations,

the feast days of saints and martyrs,
the weddings witnessed here,
the funerals celebrated here in certain hope of the resurrection.

Pause for a longer time.

Priest: God our refuge, our home is in you.
You are greater than any temple, church or cathedral which was built by human hands.
Yet in this place we have met your divine majesty. This church building has been a place
of blessing for us.
Protect us on our way. Lead us to new friends in another parish community.

All: ***Blessed be God forever!***

Priest: My brothers and sisters,
Our thanksgiving for the sacred images and places in this church reminds us of the
enduring reality they represent. Mary and all the Saints continue to intercede for us that
we may be faithful to all that God asks of us in this time and in all times. The Word of God
guides us and the Holy Body and Blood nourishes us to love and serve Him now and
throughout our lives and one day in glory.

May our thanksgiving strengthen and encourage us to walk bravely the new path set
before us with confidence in God's providence as members of a new family of faith.

If the entire community is being transferred to another church, delegate one or more members (the parish council president, the eldest member of the parish or the youngest) to carry an object (or objects) that can and will be used in the new place (such as a sacred vessel, a small icon, a parish sacramental register, or the Book of the Gospels.)

The items may be gathered on a nearby table and presented to each delegate as he / she comes forward.

Priest: The life of this community will continue in another place.
[NAME] receive this [name of item] that will be used at [name of the new church].
Take it (directly) from this place to [name of the new parish or pastor / pastoral administrator]
as a sign that our journey of faith will continue there.

The Removal of the Blessed Sacrament

The principal celebrant dons the humeral veil and goes to the tabernacle.

He removes the Blessed Sacrament, offers a benediction over the people, and follows (or leads) the procession out of the church.

The Blessed Sacrament is then taken directly to the new church or reserved in a previously-appointed place.

Procession

A final hymn is sung while all process to the entrance of the Church.

The processional cross leads the people out the main door.

The candle bearers remain with the principal celebrant, who is the last member of the procession.

Closing of the Church Doors

When the principal celebrant arrives outside the doors, the people pause and turn.

Priest: In this building, we, and those who have gone before us, have celebrated the mystery of our faith and shared our joys and sorrows. In this church we have encountered Jesus Christ in Word, sacrament, and one another. But now, after ____ years of faith, and with gratitude to almighty God for what He has allowed us to accomplish here, I declare this church of _____ closed.

Let us go in peace.

All: Thanks be to God.

Since he is still carrying the Blessed Sacrament he may delegate another person (perhaps a parochial vicar, a deacon, a charter member of the parish, or the Pastoral Council president) to close the doors and lock them.

A suitable hymn or instrumental music may follow.

LITURGICAL CELEBRATION TO MARK THE FORMAL OPENING OF A PARISH

The Mass to mark the formal opening of a parish should be as inclusive of the whole parish community as possible. Those entrusted with planning this celebration might consider the use of the Rite of Blessing and Sprinkling of Holy Water, a procession with the Book of Gospels, and Holy Communion under Both Kinds. These elements highlight the essential bonds of communion within the parish – Baptism, the proclamation of the Word of God, and participation in the saving death and resurrection of the Lord in the Mystery of the Eucharist. It is most important for this celebration of the Formal Opening of a Parish that there is a blend of liturgical ministries from all the former parishes that have now become the new parish. The liturgical music that is planned should be familiar to all those assembled for the celebration of Mass. Hospitality on this occasion includes signage and other directional information for those who may be in the church building for the first time. Finally, and perhaps a sensitive point, greeters and ushers should assist with arranging for seating for all in all parts of the church building.

Introduction after the Greeting

After the greeting, the priest celebrant might speak to the assembly in these or similar words:

We gather today to give thanks to God for bringing us to this new day in our life as a parish. We have passed through grief and loss and have arrived at the beginning of a new life. As we are now united as one people in this sacred place, we are reminded that in Baptism we are already united as the one Body of Christ.

Through this celebration of the Mystery of Christ's dying and rising, in Word and in Sacrament, may the Lord form us into

Rite for the Blessing and Sprinkling of Water

This rite is found in Appendix II of the Roman Missal.

Possible Petitions to be included in the Universal Prayer

That the Lord Jesus would pour out His Holy Spirit upon Fr. (NAME), our new pastor, our deacons, religious and lay ministers. May they be filled with the fire of God's love to lead us all into a new and deeper communion with Christ and with one another. Let us pray to the Lord...

That Christ will make us, the new parish of (NAME PARISH), a light to the community of (NAME TOWN), witnessing to the joy of our faith that comes from participation in the sacraments, the hearing of the Word of God and service to one another. Let us pray to the Lord...

RITUAL TEXTS FOR THE MERGING OF PARISHES

Introductory rites

The liturgy begins with a full procession including incense, cross, candles, and the Book of the Gospels.

It is important that the Opening Hymn be familiar to all members of the assembly.

Two representatives from each of the former parishes carry in a large vessel of blessed water from their parishes as part of the procession.

The procession moves to a visible place near the font, where the two containers of water can be easily poured.

The priest celebrant greets the people and welcomes them.

Invocation over Blessed Water

Priest: My dear brothers and sisters, we have been called to this water that we may share in the faith of the one Church and that we may have eternal life. By the mystery of this water, may we rededicate our lives to our baptismal call and to live the Gospel as a new community of faith. We ask this through Christ our Lord.

All: *Amen.*

Priest: God of mercy, through the waters of baptism you have filled us with new life.

All: *Blessed be God forever.*

Priest: From all who are baptized in water and the Holy Spirit, you have formed one people, united by your Son Jesus Christ.

All: *Blessed be God forever.*

Priest: You have set us free from sin and filled our hearts with the Spirit of your love, that we may live in your peace.

All: *Blessed be God forever.*

Priest: You call those who have been baptized to announce the Good News of Jesus Christ to all people.

All: *Blessed be God forever.*

Priest: You call us to this cleansing water and to new birth. By sharing the faith of your Church, may we come to know the joy of eternal life. We ask this in the name of Jesus the Lord.

All: *Amen.*

The presider sprinkles the assembly with the blessed water.

After the homily:

Proclamation of Consent

Priest: I ask the people of _____ and _____.
Is it your intention to become one parish community?

All: ***It is.***

Priest: Do you promise to work tirelessly for that unity of faith celebrated in the sacraments?

All: ***We do.***

Priest: Are you resolved to unite yourself more closely with Christ, and try to become more like him?

All: ***We are.***

Priest: May God who began this good work bring it to completion.

All: ***Amen.***

Decree from the Bishop

The opening paragraph of the decree from the bishop is read ending with the name of the new parish.

Presentation of the Pastor-Elect

Priest: My dear friends, because I am aware of your pastoral needs
and am confident of Father _____'s qualifications for the office of pastor. I now commend
Father _____ to you as your new pastor.

Presentation of the Parish Clergy and Staff

Priest: My brother, Father(s) _____, Deacon _____ and _____ (other staff members) will assist you
in the pastoral care of the people of this parish. Share this ministry in a spirit of mutual trust,
common prayer, and genuine concern.

The new pastor is greeted by his associates in the parish ministry.

Presentation of the Parish Council

Priest: Father _____, this is the pastoral council of _____ parish.
It is the voice of your people and will assist and counsel you as you minister to this parish. They bring
with them the names of all the baptized. Always be attentive to the needs that your council expresses.

New Pastor: My friends, I pledge to seek your counsel, guidance, and advice in the spiritual and temporal care of my parish.

The members of the parish council immediately come forward and greet the new pastor.

The parish registries from the merging parishes are brought forward and placed on the table in front of the altar by a member of each of the parishes.

After communion, devotional items may be brought forward and placed in shrines or other appropriate places.

The celebrant or another might explain what the items are, why they are important to the community and where they will be placed as a sign that two communities have become one.

APPENDIX I A

Praying Through Disbelief, Anxiety and Hurt

GREETING

We have gathered here this *morning / day / evening*, to place our future in God's hands.

As we pray through our uncertainty, our disbelief, our anger, or our hurt...all of our deeply felt emotions...let us remember that God has called us by name and desires to give us a future full of hope.

Let us pray...

O God, come to my assistance.

R/. Lord, make haste to help me.

Glory to the Father, and to the Son, and to the Holy Spirit.

R/. As it was in the beginning, is now, and ever shall be, world without end. Amen.

SUGGESTED SONG:

Healer of Our Every Ill (Haugen / GIA)
Though the Mountains May Fall (Schutte / OCP]

Psalm 46

(please sit)

The community will pray the psalm alternating sides.

Side I God is for us a refuge and strength, an ever-present help in time of distress: So we shall not fear though the earth should rock, though the mountains quake to the heart of the sea; even though its waters rage and foam, even though the mountains be shaken by its tumult.

ALL The Lord of hosts is with us: The God of Jacob is our stronghold.

Side II Come and behold the works of the Lord, the awesome deeds he has done on the earth He puts an end to wars over all the earth; the bow he breaks, the spear he snaps, the shields he burns with fire: "Be still and know that I am God, exalted over all the earth."

ALL The Lord of hosts is with us: The God of Jacob is our stronghold.

SCRIPTURE READING: 1 Corinthians 2:1a, 3-5, 7-11

(please sit)

A reading from the first letter of Saint Paul to the Corinthians

When I came to you, brothers and sisters, proclaiming the mystery of God, I did not come with sublimity of words or of wisdom.

I came to you in weakness and fear and much trembling, and my message and my proclamation were not with persuasive words of wisdom, but with a demonstration of spirit and power, so that your faith might rest not on human wisdom but on the power of God.

Rather, we speak God's wisdom, mysterious, hidden, which God predetermined before the ages for our glory, and which none of the rulers of this age knew; for if they had known it, they would not have crucified the Lord of glory. But as it is written: "What eye has not seen, and ear has not heard, and what has not entered the human heart, what God has prepared for those who love him," for this God has revealed to us through the spirit. For the Spirit scrutinizes everything, even the depths of God. Among human beings, who knows what pertains to a person except the spirit of the person that is within? Similarly, no one knows what pertains to God except the Spirit of God.

The Word of the Lord. ***R/. Thanks be to God.***

REFLECTION

Let us reflect in silence on the psalm and Scripture we have heard today.

After a time, consider these questions:

- What are your thoughts about the changes facing our parish and its people?
- Consider how you would complete this sentence:
Concerning the changes faced by this parish, "I feel..."

After taking this time to reflect on your feelings, if you wish, share with the group or the person next to you.

SPOKEN RESPONSE: Lord, heal our hearts and strengthen us in hope.

THE LORD'S PRAYER

(please stand)

So often we cannot find the right words, so now we turn to words we know by heart, the words our Savior taught us:

R/. Our Father...

CLOSING PRAYER

O God, you hear our inmost thoughts
and know the needs of our hearts.
In the midst of complex emotions, we turn to you in prayer.

Hear us, O God, in our uncertainty and doubt,
in our fear and in our anger.
If anger rises up, help us to rely on you.

Guide us with the wisdom to see new paths of possibility
and the vision to move forward.
Give us the strength to be unafraid of what is new.

We ask this through Christ our Lord.

R/. Amen.

BLESSING

(Led by a priest or deacon)

May the Lord bless you all,
the Father,
and the Son +
and the Holy Spirit.

(Led by a layperson)

May the Lord bless us,
protect us from evil
and bring us to the joy
of everlasting life.

R/. Amen.

Let us conclude our prayer with a sign of peace.

All exchange a sign of peace.

APPENDIX 1 B

One Morning
(Rosemerry Wahtola Trommer)

One morning
we will wake up
and forget to build
that wall we've been building,
the one between us
the one we've been building
for years, perhaps
out of some sense
of right and boundary,
perhaps out of habit.
One morning
we will wake up
and let our empty hands
hang empty at our sides.
Perhaps they will rise,
as empty things
sometimes do
when blown
by the wind.
Perhaps they simply
will not remember
how to grasp, how to rage.

We will wake up
that morning
and we will have
misplaced all our theories
about why and how
and who did what
to whom, we will have mislaid
all our timelines
of when and plans of what
and we will not scramble
to write the plans and theories anew.
On that morning,
not much else
will have changed.
Whatever is blooming
will still be in bloom.
Whatever is wilting
will wilt. There will be fields
to plow and trains
to load and children
to feed and work to do.
And in every moment,
in every action, we will
feel the urge to say thank you,
we will follow the urge to bow

If you wish, share your thoughts on the following questions:

- What in my life needs healing and acceptance?
- What in our church or parish needs to be healed?

UNIVERSAL PRAYER

(please sit)

Leader: We bring our prayer requests to our loving Father, as children in need of a home. We long to ask for strength to open our eyes, our ears, and our hearts to the needs of the people of our Archdiocese, and especially to the people in our local community.

Readers: Our response is, "Hear us, O Lord."

That we may be agents of healing in a time of pain, willing to consider the needs of others beyond our own, we pray ... ***R/***.

That bishops and priests may receive the support they need to carry out their mission to teach, govern and make holy, we pray ... **R/**.

That we may open our eyes to the presence of God in each person we encounter along this journey, we pray ... **R/**.

That we may open our ears to the message of hope ever before us, and the whisper of the Spirit at work in our midst, we pray ... **R/**.

That we may open our hearts to feel gratitude for what we have had and anticipation for what lies before us, we pray ... **R/**.

Leader: God of mercy, we plead for your gentle touch on our lives in this time of change. Help us in our words and actions to honor those who have gone before us, those who helped build your kingdom here in our community. Enable us to embody their faith and perseverance as we broaden our reach to the greater world around us. We ask this through Christ, our Lord.

Amen.

THE LORD'S PRAYER

(please stand)

Leader: Let us pray with hope, as Jesus taught us to pray: "**Our Father...**"

BLESSING

Leader: May God bless us with his mercy, strengthen us with his love, and enable us to walk in the peace of Christ.

R/ Amen.

Let us conclude our prayer with a sign of peace.

All exchange a sign of peace.

APPENDIX I C

Praying Through Times of Transition

GREETING

All: In the name of the Father, and of the Son, and of the Holy Spirit. Amen.

Leader: Let the morning bring me word of your unfailing love, for I have put my trust in you.
Show me the way I should go, for to you I entrust my life. (Psalm 143: 8)

R/. Let the morning bring me word of your unfailing love, for I have put my trust in you.
Show me the way I should go, for to you I entrust my life.

Leader: Lord, we your people are facing change here in (name of parish or the Archdiocese of Hartford). Our human hearts tremble with anger, with grief, with the angst of uncertainty. But like the sheep of the pasture, our lives are ever in your care, Lord. Remind us always of your unfailing love, your steadfast presence, through any kind of transition. That is all we really need and all we truly ask through your Son, Jesus Christ, our Lord.

R/. Amen.

SUGGESTED SONG: *Come to the Water* (Foley / OCP)
Blest Be the Lord (Schutte / OCP)

SCRIPTURE READING *John 14:1-7* (please stand)

A reading from the holy Gospel according to John:

"Do not let your hearts be troubled. You have faith in God; have faith also in me. In my Father's house there are many dwelling places. If there were not, would I have told you that I am going to prepare a place for you? And if I go and prepare a place for you, I will come back again and take you to myself, so that where I am you also may be. Where I am going you know the way."

Thomas said to him, "Master, we do not know where you are going; how can we know the way?" "I am the way, and the truth, and the life. No one comes to the Father except through me. If you know me, then you will also know my Father."

The Gospel of the Lord. ***R/. Praise to you, Lord Jesus Christ***

Let us take the time to prayerfully read the following reflection – Prayer in Time of Uncertainty and Prayer in Time of Hope -

After a brief period of silence, share your thoughts on the following questions, if you wish.

Consider how this transition is like other life changes: college or military service, marriage, loss of a parent.

Consider how this transition is like other changes in the community: a new pastor, the creation of a new church.

What helps you manage those transitions? What might help in this situation – for the community or for you?

RESPONSE:

Increase our Faith (Haas / GIA)

(Listening)

UNIVERSAL PRAYER

(please stand)

Leader: Filled with faith, energized by the power of God's love, and united by the mission to proclaim the Good News, we pray for the needs of the Church.

R/. God of mercy, hear our prayer

Readers: For Archbishop Blair, and all those working with him in prayerfully guiding this process to unite our parishes and strengthen the People of God in the Archdiocese of Hartford, that they may be blessed with discerning hearts, pastoral wisdom and deep humility in their efforts, we pray ... ***R/.***

For the lay men and women who serve our parishes, that the richness, diversity, and gifts of each person will be honored and employed, we pray ... ***R/.***

For those struggling with the prospect of change, that they may see through their difficulty to the possibility of renewal, not as a threat to what has been, but as an invitation to what can be, we pray ... ***R/.***

For those who fear the loss of their Catholic identity, that they may be inspired to greater involvement in extending the Church's firm foundation in new and unexpected ways, we pray ... ***R/.***

For each of us who make up the Church of the Archdiocese of Hartford, that we may be empowered in this time of transition to share our voices in honest, constructive and respectful ways and to listen with open hearts and minds, we pray ... ***R/.***

For those parishes facing immediate changes, that we may be sources of support, compassion and encouragement in this time of transition, we pray ... ***R/.***

Leader: Loving God, you give us more than we can ever imagine or ask for, even when we do not readily recognize your presence. Help us to be genuine in our self-reflection, tireless in our commitment, patient in our discernment, loving in our communion, imaginative about our future, and daring in our faith. We pray all these things through Christ Our Lord.

Amen.

THE LORD'S PRAYER

CLOSING PRAYER

All: We are your people, Lord, the flock you have called. Accept us, even in our weakness, our brokenness, our need to know, to manage, to save ourselves. Now in new and uncomfortable surrender, we hand over to you our planning for the next seasons of our lives. Show us the way through these transitions - of age and stage, of place and of past experiences, of finances and health, of ministries and communities. Shepherd us beyond our wants, beyond our fears. And guide us to pastures, to dwelling places, rich and verdant beyond our imagination.

BLESSING

Leader: (making the sign of the cross)

May the love of God embrace us, the obedience of Christ empty us, and the will of the Spirit embolden us as we journey together to the kingdom.

Amen.

Let us conclude our prayer with a sign of peace.

All exchange a sign of peace

¹ *Dies Domine* On Keeping the Lord's Day Holy, 32.

APPENDIX I D

Praying for Hope and Trust in God's Faithfulness

SUGGESTED SONG: *Though the Mountains May Fall* (Schutte / OCP)
 You Are Near (Foley / OCP)

OPENING PRAYER

Leader: In times of change and stress, God's love is constant and consoling. Even when we feel abandoned, God loves us. The promise of eternal life is invisible, yet we believe. We gather together to celebrate God's faithfulness to us and to seek ways to show our faithfulness to God. Hear us, O God, as we unite ourselves to you. Increase in us our faithfulness. **Amen.**

SCRIPTURE READING: *Hebrews 11:1-2, 8-19* (*please sit*)

A reading from Paul's letter to the Hebrews

Brothers and sisters: Faith is the realization of what is hoped for and evidence of things not seen. Because of it the ancients were well attested. By faith Abraham obeyed when he was called to go out to a place that he was to receive as an inheritance; he went out, not knowing where he was to go. By faith he sojourned in the Promised Land as in a foreign country, dwelling in tents with Isaac and Jacob, heirs of the same promise; for he was looking forward to the city with foundations whose architect and maker is God. By faith he received power to generate, even though he was past the normal age – and Sarah herself was sterile – for he thought that the one who had made the promise was trustworthy. So it was that there came forth from one man, himself as good as dead, descendants as numerous as the stars in the sky and countless as the sands on the seashore.

All these died in faith. They did not receive what had been promised but saw it and greeted it from afar and acknowledged themselves to be strangers and aliens on earth, for those who speak thus show that they are seeking a homeland. If they had been thinking of the land from which they had come, they would have had opportunity to return. But now they desire a better homeland, a heavenly one. Therefore God is not ashamed to be called their God, for he has prepared a city for them. By faith Abraham, when put to the test, offered up Isaac, and he who had received the promises was ready to offer his only son, of whom it was said, "Through Isaac, descendants shall bear your name." He reasoned that God was able to raise even from the dead, and he received Isaac back as a symbol.

The Word of the Lord.

R/. Thanks be to God.

REFLECTION

In this reading, we witness Abraham's faithfulness and his belief that God would fulfill his promises of countless descendants and the city of God. Hebrews 11:6 says: "But without faith it is impossible to please him, for anyone who approaches God must believe that he exists and that he rewards those who seek him."

Consider these questions in silence. Then discuss and share in small groups, or with the whole group.

Which of God's promises are most important to you?

(Name God's promises first. Then answer the second question for each promise.)

- What does each promise require of you?

UNIVERSAL PRAYER

(please stand)

Leader: In hope and trust, we bring our needs to the Lord and pray, "Strengthen us, Lord."

Readers: That those who shape your church may be guided by faith, wisdom and hope, we pray to the Lord...**R/**.

That the hearts and mouths of the faithful might be opened to participate fully in worshipping you, we pray to the Lord...**R/**.

That we may be thankful for the faithfulness God has shown to his people, we pray to the Lord...**R/**.

That we may grow in the strength to believe in the fulfillment of God's promises, we pray to the Lord...**R/**.

That we may believe God loves us always and that we are worthy of God's love, we pray to the Lord...**R/**.

Leader: Loving God, you gave Isaac back to Abraham, but sacrificed your Son for us. Help us to live each day sacrificing for others. We ask this through Christ our Lord.

All: **Amen.**

CLOSING PRAYER

Leader: Faithful God, we dream because you have given us vision, faith, hope and love. Without you, our dreams are worthless and our hopes empty. Sustain us with your love and renew us with your grace. We are men and women of faith and depend totally on you. Amen.

BLESSING

(Led by a priest or deacon)
May the Lord bless you all,
the Father,
and the Son +
and the Holy Spirit.

(Led by a layperson)
May the Lord bless us,
protect us from evil
and bring us to the joy
of everlasting life.

R/. Amen.

SUGGESTED SONG: *We Walk By Faith* (Haugen / GIA)

APPENDIX I E

Honoring Our Traditions, People and Treasures

Significant art work, statues, historic plaques, etc. may be honored with candles or flowers.

INTRODUCTION

Leader: Brothers and sisters, we gather here to recall all that we have been to each other as a parish community and all that Christ has been *through us* to the world beyond our parish boundaries. In this building, surrounded by many of the same people gathered here now, we have shed tears of joy and sorrow, shared in the rites and sacraments of the church and borne together the name, "People of God," as _____ Parish. We reflect upon all that God, our Father, has done for us and all that God will continue to do as we entrust our future to him. Let us now stand and sing together.

SUGGESTED SONG: *One Spirit, One Church* (Kiel / OCP)

OPENING PRAYER

Leader: Loving God, we rejoice in having been chosen to be the bearers of light, your Word, your love and your life. We rely on you to guide us on our journey. Send us your Holy Spirit, the spirit of wisdom, understanding and fortitude, to light our way. Send us your compassion, so that as one community we can unleash your power among us. We make our prayer through your Son, our Lord Jesus Christ.

All: Amen.

SCRIPTURE READING *Hebrews 12:1-3* (please sit)

A reading from Paul's letter to the Hebrews

Therefore, since we are surrounded by so great a cloud of witnesses, let us rid ourselves of every burden and sin that clings to us and persevere in running the race that lies before us while keeping our eyes fixed on Jesus, the leader and perfecter of faith. For the sake of the joy that lay before him he endured the cross, despising its shame, and has taken his seat at the right of the throne of God. Consider how he endured such opposition from sinners, in order that you may not grow weary and lose heart.

The Word of the Lord.

R/. Thanks be to God.

REFLECTION

*Take some time to reflect on our parish and its history and consider the questions below.
You may wish to share your thoughts with those around you or with the entire group.*

- What is most important to you about our parish history and tradition?
- How does our history point us toward the future? (How did the founders of the parish look to the future?)
- What elements of our community life should be preserved and revered to guide the next generation? (important festivals or gatherings, revered sacred items, etc.)

- In keeping with our Christian responsibility to spread the Gospel of Christ, how might we honor our past while looking toward building the church of the future?

Leader: Gracious God, may the people and events of the past that we bring with us into this new chapter of our Christian story be both a comfort and inspiration as we walk forward in faith. We pray through your Son, our Lord Jesus Christ.

All: **Amen.**

CLOSING PRAYER

(please stand)

All: O God of glory and majesty – of peace and compassion – of infinite and life-giving love; You are good! For untold years you have blessed this church. We praise and thank you for the countless women, men and children through the years whose faith, vision, and sacrifice have helped to build this house of prayer, this dwelling place of God, this church:

Reader 1: A church where the dignity of each person is respected, where one can feel at home, a church of freedom that welcomes without judging, that forgives without condemning, a church of mercy.

Reader 2: A church that listens before it speaks, that admits its mistakes and learns from them, a church of wisdom.

Reader 3: A church where daring to do something new is stronger than the habit of doing what has been done before, a church of possibility.

Reader 4: A church that reaches out to care for the least among us, the poor, the marginalized, and the forgotten, a church of justice.

Reader 5: A church where the faithful gather as seekers of God, where all are nourished by Word and sacraments, a church of healing.

All: Rooted in your Spirit, may we face our future with the same hope and faith and love as first envisioned by our founding priests and families as we commit ourselves to a new witness of service and sacrifice.

We pray through Christ, our Lord. **Amen.**

BLESSING

(Led by a priest or deacon)

May the Lord bless you all,
In the name of the Father,
and the Son +
And the Holy Spirit.

(Led by a layperson)

May the Lord bless us,
protect us from evil
and bring us to the joy
of everlasting life.

R/. Amen.

SUGGESTED SONG:

Praise God from Whom All Blessings Flow (OLD HUNDREDTH)]

APPENDIX I F

Praying with Praise and Thanksgiving

SUGGESTED SONG: *Glory and Praise to Our God* (Dan Schutte / OCP)

GREETING

Leader: In the name of the Father + and of the Son, and of the Holy Spirit. ***R/. Amen.***

We have gathered on this day to give thanks and praise to Almighty God for the many blessings bestowed on this community. We have come far in this pastoral planning process, and now we step into the future with courage and hope.

We praise the God who brings us healing and salvation, who always provides for his people, and who leads us through uncertainty to a place of peace and trust.

Thankful to the God who gives us all good things. Let us pray:

OPENING PRAYER

Leader: O God, whose Son promised to all those gathered in his name that he would be there in their midst, grant, we pray, that we may be aware of his presence among us and, in truth and charity, experience in our hearts an abundance of grace, mercy and peace. Through our Lord Jesus Christ, your Son, who lives and reigns with you in the unity of the Holy Spirit, one God, for ever and ever. ***R/. Amen.***

SCRIPTURE READING: *Sirach 50:22-24* (please sit)

A Reading from the Book of Sirach

And now, bless the God of all, who has done wondrous things on earth; who fosters people's growth from their mother's womb, and fashions them according to his will! May he grant you joy of heart and may peace abide among you; may his goodness toward us endure in Israel to deliver us in our days.

The Word of the Lord. ***R/. Thanks be to God.***

PSALM 33 ***Lord, let your mercy be on us, as we place our trust in you.***

Exult, you just, in the LORD; praise from the upright is fitting.
Give thanks to the LORD on the harp; with the ten-stringed lyre chant his praises. ***R/.***

Upright is the word of the LORD, and all his works are trustworthy.
He loves justice and right; of the kindness of the LORD the earth is full. ***R/.***

See, the eyes of the LORD are upon those who fear him,
upon those who hope for his kindness, to deliver them from death and preserve them
in spite of famine. ***R/.***

GOSPEL

Luke 12:22-34

(please stand)

A reading from the holy Gospel according to Luke

Jesus said to his disciples, "Therefore I tell you, do not worry about your life and what you will eat, or about your body and what you will wear. For life is more than food and the body more than clothing. Notice the ravens: they do not sow or reap; they have neither storehouse nor barn, yet God feeds them. How much more important are you than birds!

Can any of you by worrying add a moment to your life-span? If even the smallest things are beyond your control, why are you anxious about the rest? Notice how the flowers grow. They do not toil or spin. But I tell you, not even Solomon in all his splendor was dressed like one of them. If God so clothes the grass in the field that grows today and is thrown into the oven tomorrow, will he not much more provide for you, O you of little faith? As for you, do not seek what you are to eat and what you are to drink, and do not worry anymore. All the nations of the world seek for these things, and your Father knows that you need them. Instead, seek his kingdom, and these other things will be given you besides. Do not be afraid any longer, little flock, for your Father is pleased to give you the kingdom. Sell your belongings and give alms. Provide money bags for yourselves that do not wear out, an inexhaustible treasure in heaven that no thief can reach nor moth destroy. For where your treasure is, there also will your heart be.

The Gospel of the Lord.

R/. Praise to you, Lord Jesus Christ.

REFLECTION

Take some time to consider one of the questions below and then share in your small group.

- Throughout the pastoral planning process, I am most grateful for...
- As we move toward the future, I am most hopeful for / about...

UNIVERSAL PRAYER

Leader: God has blessed us, the church, in abundance. With faith and trust, let us bring our prayers before the one who gives us all we need. The response is "Lord, hear our prayer."

Readers: For the church of God throughout the world. May it be healed of all division and proclaim God's Word with one heart and one voice. We pray to the Lord... ***R/.***

For our Archdiocese. May we be strengthened in the bonds that unite us as God's church through our efforts of revitalization. We pray to the Lord... ***R/.***

For the *(merging or partnering)* parish(es) of _____. May we be fashioned into a community that promotes the fullness of life for its members and for all peoples. We pray to the Lord... ***R/.***

For all of us, gathered to give thanks to God. May we recognize the gifts we have received from the Spirit and use them for the good of our parish and for all. We pray to the Lord... ***R/.***

Leader: Good and gracious God, we give you thanks and place our trust in you. Hear our prayers, guide us in the time of change, and give us the strength to persevere so that one day we may share everlasting life with you. We ask this through Christ our Lord.

R/. Amen

THE LORD'S PRAYER

Leader: At the Savior's command and formed by divine teaching, we dare to say: ***Our Father...***

PRAYER AND BLESSING

Leader: God of mercy and love, we give you praise and thanksgiving for all your gifts and blessings. We look to you alone with trust and confidence that you will transform all of our dreams and aspirations into a zealous desire for the gifts of the Spirit. Send us forth to do your will, so that we might be a sign of your Spirit present in the world. We ask this through Jesus Christ our Lord.

R/. Amen.

Leader: May the Lord bless us, protect us from all harm, and lead us to everlasting life.

R/. Amen.

As we go forth, let us share with one another a sign of God's peace.

APPENDIX I G

***Looking Forward with Hope
(for merged parishes)***

INTRODUCTION

(All sit)

Leader: As we gather today to pray, we gather as church, the People of God, members of the Body of Christ. We remember that the church is one, both human and divine. In the pastoral plan for the Archdiocese of Hartford, we considered a partnered parish or one that will merge into a stand-alone parish. But no parish or church truly stands alone. Under the leadership of the Archbishop, parishes have been called to work with one another, to collaborate, so that together, we may be the hands and feet of Christ in our Church.

As we implement the pastoral plan, we look to the future with hope. We pray to grow in holiness and in our ability to evangelize and minister to those around us, especially the poor, the sick and the marginalized. We pray for faith, hope and charity as we continue our spiritual walk with the Lord. Let us begin by standing and singing together.

SONG:

One Spirit, One Church (Kiel / OCP)

OPENING PRAYER

(All stand)

Leader: God, loving Father, in the midst of confusion and change, keep us centered in you. When we are not confident of what is asked of us, keep us calm. When the voices around us say "This won't work," help us to trust in you. Give us the humility to embrace our own moments of doubt, so that we do not add to the confusion. Help us to trust only in you. For with you all things are accomplished; for you live and reign forever and ever.

All: Amen.

SCRIPTURE READING:

2 Corinthians 5:17-20

(All sit)

A reading from the 2nd letter of St. Paul to the Corinthians

So whoever is in Christ is a new creation: the old things have passed away; behold, new things have come. And all this is from God, who has reconciled us to himself through Christ and given us the ministry of reconciliation, namely, God was reconciling the world to himself in Christ, not counting their trespasses against them and entrusting to us the message of reconciliation. So we are ambassadors for Christ, as if God were appealing through us. We implore you on behalf of Christ, be reconciled to God.

The Word of the Lord.

R/. Thanks be to God.

REFLECTION

Take some time to consider the questions below and then discuss in small groups.

- How does the call to be partnered or to merge help us to be more deeply united as Christians?
- How could this change make us stronger and help us to spread the Good News of Jesus Christ?
- How can we honor our past and yet move forward while staying centered on Christ?
- How do we work together with other parishes and support one another as members of the Archdiocese of Hartford?

UNIVERSAL PRAYER

(All stand)

Leader: We are a pilgrim people embarking on a journey to unknown places. We need guidance and blessing and ask our God to hear us in our moment of need.

Readers: Our response will be "Lord, hear our prayer."

For hearts to be stilled and for faith that will not be shaken, we pray...**R/**.

For troubled hearts, that we may learn to savor how good the Lord is, we pray...**R/**.

For trust and patience, to know that all who call upon the Lord will be answered and delivered from distress, we pray... **R/**.

For courage and guidance when we walk through the dark valleys in life, we pray...**R/**.

For the members of our churches of _____ and _____, that we honor our history while building new traditions, we pray... **R/**.

For the faith and trust to honor our past, but to release it so that we might begin to build a future community of faith, we pray....**R/**.

THE LORD'S PRAYER

Leader: Let us pray as our Savior taught us: **Our Father...**

CLOSING PRAYER

Leader: Compassionate Father, grant us visions of truth, graces to persevere, and integrity in purpose and action as we strive to be good stewards. It is through us and what we do and are, that others come to know you. Teach us to bring peace and healing to our world. Help us to use our gifts for the building up of your church and hasten the coming of your kingdom; through Christ our Lord. **Amen.**

BLESSING and DISMISSAL

Leader: May the Lord bless us, protect us from evil and bring us to the joy of everlasting life. **R/ Amen.**

Go in peace, to love and serve the Lord.

SUGGESTED SONG:

You Are Mine (Haas/GIA)

***Looking Forward with Hope
(for stand-alone parishes)***

INTRODUCTION

(All sit)

Leader: As we gather today to pray, we gather as church, the People of God, members of the Body of Christ. We remember that the church is one, both human and divine.

In the pastoral plan for the Archdiocese of Hartford, we are considered a stand-alone parish. But no parish or church truly stands alone. Under the leadership of Archbishop Blair, parishes have been called to work with one another, to collaborate so that that, together, we may be the hands and feet of Christ in our Archdiocese.

As we implement the pastoral plan, we look to the future with hope. We pray to grow in holiness and in our ability to evangelize and minister to those around us, especially the poor, the sick and the marginalized. We pray for faith, hope and charity as we continue our spiritual walk with the Lord. Let us begin by standing and singing together.

SUGGESTED SONG: *Prayer of St. Francis (Temple / OCP)*

OPENING PRAYER

(Please stand)

Leader: God of mercy and love, we come before you with prayers of praise and thanksgiving, ever grateful for all your gifts and blessings. We look to you with total confidence. Stir in us a desire for the gifts of the Spirit. May we be ever vigilant for the day of your coming and serve our brothers and sisters in need after the example of your Son who lives and reigns forever and ever.

All: ***Amen.***

READING *1Corinthians 2:6-13*

(All sit)

A reading from the first letter of St. Paul to the Corinthians:

Yet we do speak a wisdom to those who are mature, but not a wisdom of this age, nor of the rulers of this age who are passing away. Rather, we speak God's wisdom, mysterious, hidden, which God predetermined before the ages for our glory, and which none of the rulers of this age knew; for if they had known it, they would not have crucified the Lord of glory. But as it is written:

"What eye has not seen, and ear has not heard,
and what has not entered the human heart,
what God has prepared for those who love him,"
this God has revealed to us through the Spirit.

For the Spirit scrutinizes everything, even the depths of God. Among human beings, who knows what pertains to a person except the spirit of the person that is within? Similarly, no one knows what pertains to God except the Spirit of God. We have not received the spirit of the world but the Spirit that is from God, so that we may understand the things freely given us by God. And we speak about them not with words taught by human wisdom, but with words taught by the Spirit, describing spiritual realities in spiritual terms.

The Word of the Lord.

R/. Thanks be to God.

REFLECTION

Take some time to consider some of the questions and then discuss in small groups.

- What values of this parish are most important to you?
- How do we discern the action of the Spirit among us and continuing to build the kingdom of God?
- What should this parish look like now and in the next decade?
- How can we collaborate more effectively with our neighboring parishes to achieve that vision?

UNIVERSAL PRAYER

(All stand)

Leader: We are a pilgrim people in need of guidance and blessing.
Let us voice our needs before our God...

Readers: Our response is "Lord, hear our prayer."

For gratitude and thanks that God's love endures forever, we pray...**R/**.

For steadfastness that wisdom will not slip from our sight and that God's advice and counsel will stay in view, we pray...**R/**.

For a yearning heart that cries out, "Come seek God's face", we pray...**R/**.

For a deep communion with the Jesus that his help be with us always and that we may not withdraw from him, we pray...**R/**.

For all Catholics, that the Holy Spirit may guide us to experience a renewal of faith, hope and charity, we pray...**R/**.

THE LORD'S PRAYER

Leader: Let us pray as our Savior taught us: **Our Father...**

CLOSING PRAYER

Leader: Compassionate Father, enkindle in our hearts the fire of your Holy Spirit. May that same Spirit renew us with energy and hope. Charge our hearts with the fire of passionate love, so that we may be for one another a sign of your presence in the world; through Christ our Lord. **Amen.**

BLESSING and DISMISSAL

Leader: May the Lord bless us, protect us from evil and bring us to the joy of everlasting life. **Amen.**

Go in peace, to love and serve the Lord.

SUGGESTED SONG: *You Are Mine* (Haas / GIA)

With gratitude to the Archdiocese of Milwaukee, the Archdiocese Philadelphia, the Diocese of Erie and the Diocese of Wheeling-Charleston for permission to adapt several rituals and prayers and for the use of A Struggle for Holy Ground: Reconciliation and the Rites of Parish Closure by Michael Weldon, Liturgical Press, 2004.

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Faith and Culture

Canonical Structures and Pastoral Care

On 14 May 2004 the Pontifical Council for the Pastoral Care of Migrants and Travelers, in an instruction entitled, ***Erga Migrantes Caritas Christi (The Love of Christ Toward Migrants)*** pointed out the fact that today's migration constitutes the greatest movement of peoples of all times.

From its very beginning, the counties of the Archdiocese of Hartford have become home to a great diversity of peoples from all over the world. Their presence has enriched the lives of all in this area of the country. Today, we continue to welcome persons from various parts of the world: from Eastern Europe, Middle East, Asia, Africa, the Pacific Islands, the Caribbean Islands, Mexico and from Central and South America. The 2004 instruction states that welcoming the stranger remains a permanent feature of the church of God. As a Catholic community, living in the spirit of the Gospel, we are called to create an authentic culture of welcome.

As we plan for the future of the many communities present in the Archdiocese of Hartford, attention to the **canonical norms** and the pastoral considerations presented in ***Erga Migrantes Caritas Christi (EMCC)*** will be helpful.

Canonical Norms:

The Code of Canon Law for the Latin Church, in confirmation and application of the spirit of Vatican Council II, directs parish priests to be especially attentive toward persons who are far from their own country (Canon 529.1) It stresses the desirability and obligation, whenever possible, of arranging specific pastoral care for them (Canon 568). Like the Code of Canons for the Eastern Churches, it envisions the establishment of personal parishes (Latin Canon 518 and Eastern Canon 280.1) as well as missions and other structures for the spiritual care of the faithful (Canon 516). The revised Code of Canon Law provides for the institution of other specific pastoral structures (Canon 516.2) as provided for in the legislation and practice of the Church. (cf. EMCC, 24; see also *Ecclesia in America*, 65)

Pastoral Care

Pastoral care of migrants means welcome, respect, protection, promotion and genuine love of every person in his or her religious and cultural expression (cf. EMCC, 28).

The person primarily responsible for this is the diocesan / eparchial bishop, who in full respect for the migrants' diversity and spiritual and cultural patrimony goes beyond the limits of uniformity, distinguishing the territorial character of the care of souls from that of care based on belonging to ethnic, linguistic, cultural and ritual groups (cf. EMCC, 89).

In this context, each host church is called upon to integrate the concrete reality of the persons and groups who compose it, bringing the values of each one into communion as all are called upon to build a church that is concretely Catholic. "In this way there is brought about a unity in plurality in the local church, a unity that is not uniformity but harmony, in which every legitimate diversity plays its part in the common and unifying effort (cf. EMCC, 89).

Pastoral work among migrants thus becomes a service of the church for the faithful whose language or culture are different from those of the host country, while at the same time it ensures that the foreign communities make their own contribution to the construction of a church that must be a sign and instrument of unity with the prospect of a renewed humanity.

It is this vision that has to be deepened and integrated also to avoid possible tensions between territorial parishes and ethnic-linguistic communities, between native-born presbyters and foreign-born presbyters. In all this consideration should also be given to the classic distinction between first, second and third generations of migrants, each one having its own characteristic and specific problems (cf. EMCC, 89).

Therefore, those responsible for pastoral work among migrants should have a certain expertise in intercultural communication. The same also applies to those responsible for pastoral care on the local level since those coming from abroad cannot effect such cultural mediation on their own.

The principal tasks of the pastoral worker of a territorial parish are, above all, thus:

- Safeguarding the migrants' ethnic, cultural, linguistic and ritual identity since effective pastoral activity is unthinkable if it does not respect and value their cultural heritage which, however, must also be brought into dialogue with the local church and culture so as to respond to new demands." (EMCC, 78). In support of this concept, a decree issued by the Supreme Tribunal of the Apostolic Signature, in response to a challenge presented to the Tribunal by a parishioner of St. Jeanne d'Arc Parish in the Boston Archdiocese, stated: "Moreover, there is not only a right of migrants to preserve their spiritual heritage, but also an obligation of rightful integration into their new homeland" (1 February 2008).
- Guiding on the way to authentic integration, avoiding a cultural ghetto and at the same time opposing the pure and simple assimilation of migrants into the local culture;
- Incarnating a missionary and evangelizing spirit by sharing the situation and conditions of migrants, with the ability to adapt and make personal contacts in an atmosphere of a clear witness of life (cf. EMCC, 78);

The challenge of helping ethnic-linguistic communities find their place in the church is mainly on two planes: one is canonical and structural and the other theological and pastoral (cf. EMCC, 90).

Response to the needs of the various ethnic communities can take a variety of forms.

Ethnic-linguistic pastoral care:

- A personal ethnic-linguistic parish is foreseen for places where there is an immigrant community that will continually have newcomers even in the future and where that community is numerically strong. It maintains the typical characteristic service of a parish and will be concerned above all with recent immigrants, seasonal workers or those coming in turns and with others who for various reasons have difficulty in finding their place in the existent territorial structures.
- A local territorial parish with an ethnic-linguistic mission. This is identified with a territorial parish which, with the help of one or more pastoral workers, would take care of one or more ethnic-linguistic communities. The presbyter here would be part of the parish team.
- An ethnic-linguistic pastoral service on a zonal level, understood as pastoral care for immigrants who are relatively well integrated in the local society. It seems important indeed to keep certain elements of pastoral care based on language or linked to nationality or particular rite. That would guarantee essential services, including those related to a particular type of culture and piety, and at the same time promote openness and interaction among the territorial community and the various ethnic groups (cf. EMCC, 91).

Canonical and Structural considerations:

When the canonical erection of a stable structure for pastoral care appears difficult or inopportune, this does not diminish the duty to help Catholic immigrants pastorally in whatever manner seems best in view of circumstances, even without specific canonical institutions. Informal, perhaps spontaneous, pastoral arrangements deserve to be recognized and encouraged within ecclesial circumscriptions, independent of how many people benefit from them, if only to avoid the danger of improvisation and isolated and unsuited pastoral workers or even of sects. (cf. EMCC, 92)

Finally, as we move forward in trying to address the pastoral needs of our communities, we may envisage certain environments, structures or specific pastoral sectors that are dedicated to animation and formation at various levels in the world of migrants. We have in mind:

Pastorates among young persons and for vocational orientation;

- Centers for the formation of the laity and pastoral workers in a multicultural perspective;
- Centers for study and pastoral reflection, with the task of observing the evolution of the migration phenomenon and presenting suitable pastoral proposals to those in charge. (cf. EMCC, 94)

Our Archdiocesan faith community strives to respond to the pastoral needs of all of our brothers and sisters belonging to a wide diversity of ethnic groups. The members of the Archdiocesan staff are eager to assist the parishes in the formation and care of the various ethnic communities. Please contact us for resources and assistance.

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References:

Erga Migrantes Caritas Christi (EMCC) (*The Love of Christ toward Migrants*), a document of the Pontifical Council for the Pastoral Care of Migrants and Travelers, published on May 3, 2004.

The Church and Human Mobility, a document of the Pontifical Council for the Pastoral Care of Migrants and Travelers, published in 1978.

Ecclesia in America (*The Church in America*) Pope John Paul II, published on January 22, 1999.

Clergy Issues

To Pastors, Parochial Vicars and Deacons:

This is not an easy time for you. If you are a Pastor, Administrator, Parochial Vicar or Deacon assigned to a parish that is merging or closing you too face the emotional experiences of transition as the rest of the staff and all the people in your parish. If you have been in a parish for a significant length of time, the transition could be dramatic. As the designated “leaders” of the parish, you carry the burden of having to support others through the trauma of this merger or closure while experiencing the distress within yourself. The courage, strength and grace you need are daunting. Archbishop Leonard P. Blair has asked Father Robert Vargo, Vicar for Clergy, to provide you with as much assistance as possible. Below are a few concerns about assignments and support.

Reassignment and Transition

The difference in the process of transition for clergy of a parish that will close from other staff members is your ordination and relationship to the Archbishop. When a parish is closed, the canonical assignment of pastor, parochial vicar or deacon ends. The Clergy Personnel Board addresses the transition of all clergy and makes an appointment recommendation to the archbishop. The normal procedures governing a reassignment will take place; however, given the numbers of ordained clergy in transition, the Clergy Personnel Board may establish special procedures to expedite the process. The goal will be to address your transition in the most personal and supportive way possible. Please be confident to tell the Vicar for Clergy or Director of the Office of the Permanent Diaconate your needs so that they can be considered.

PASTOR – When your pastorate ends due to the closing of the parish, there are a variety of scenarios that might take place. Because you have provided years of service to the Archdiocese as a pastor there may be great difficulty in moving to any new assignment. We will do our best to address whatever issues arise. Depending on individual circumstances, you may be called to schedule a meeting to discuss your future status, ministry and assignment and answer your personal questions.

ADMINISTRATOR – When your assignment ends due to the closing of the parish, depending upon individual circumstances, you may be called to schedule a meeting to discuss your future status, ministry and assignment and answer your personal questions. We will do our best to address whatever issues arise.

PAROCHIAL VICAR – If you are ending your assignment as a parochial vicar, depending upon individual circumstances, you may be called to schedule a meeting to discuss your future status, ministry and assignment and answer your personal questions. We will do our best to address whatever issues arise.

RELIGIOUS ORDER PRIESTS – If the parish where you have been assigned is being merged or closed, the Archbishop or his Vicar for Religious will collaborate with your Provincial Superior relative to your future status, ministry, and assignment in the Archdiocese of Hartford. We will do our best to address the issues and concerns that arise.

PERMANENT DEACON – If the closing parish has a permanent deacon, the Director of the Office of the Permanent Diaconate will work with him and the Vicar for Clergy. The deacon may be called to schedule an individual meeting to discuss his future status, ministry and assignment and answer personal questions. We will do our best to address whatever issues arise. However, it should be noted that those deacons who are employed for specific areas of parish life (business manager, principal, pastoral associate, etc.) will be treated in the manner similar to other parish employees as outlined in section 19 (Reduction in Force).

Support in Transition

We suspect that there will be individual issues arising around assignments and Father Robert Vargo will be available to help resolve those concerns. The coming months may be the most difficult time of your ministry. Some may experience a range of emotions. It is imperative that each person care for himself in a healthy and forthright manner. It will be difficult to help a person in transition if he does not face his emotional state honestly. Please do not hesitate to contact any of the above mentioned priests to help you.

Deanery – Our Archdiocese has a great sense of fraternity. The priests of most deaneries meet on a regular basis in order to be of support to one another in their priestly life and ministry. The Deans will continue gathering the priests in each deanery for discussions. These gatherings can provide added support by inviting speakers to offer direction and support and discussing some of the problems and solutions among you. The members of the deanery can actively support one another by gathering for prayer or socially, connecting by phone or e-mail and having meals together. More opportunities for communication and sharing will be beneficial to all.

Support from the Vicar for Clergy & the Diaconate Offices – Father Robert Vargo, Vicar for Clergy, is available to priests and deacons for listening to and addressing personal concerns – as well as providing outreach to you. Deacon Robert Pallotti, Director of the Office of the Diaconate is always available to deacons for sharing, listening and addressing issues related to your assignment. Father Michael Whyte, Director of the Office of Continuing Education, will offer some programs of support and spiritual direction. Other offices will also collaborate because we desire to provide as much help as necessary. We hope to increase communication among us through the AOHCT.org e-mail system and website that were introduced recently.

Self-Supporting Efforts – What do you need? In order that all priests and deacons remain effective leaders during this reconfiguration, it is imperative that you take responsibility for your personal health – mind, body and spirit. Monitor your physical health by having an updated physical examination. A comprehensive executive physical is covered in full and an enhanced benefit for all priests / administrators is covered when performed at St. Mary's Hospital in Waterbury and St. Francis Hospital in Hartford. Begin a regime of exercise, however minimal. Walking every day has been proven extremely effective. Be conscious of taking time away from the parish despite the overwhelming tasks. Don't forget to pray daily, go on retreat and days of recollection, study and read a bit more and just simply relax. Your good health is essential! Continue, or begin, spiritual direction on a regular basis. We also encourage priests and deacons to care enough for those around them to let Father Vargo know if someone needs help, and to humbly accept help if someone offers it.

The opportunities for support will only be as effective to the extent that they are used. It is certainly our desire to do whatever is necessary to assist you. We encourage you to share your ideas or concerns with any of us.

Let us trust the Lord in this endeavor and trust one another. As we regularly tell our people, we need not be afraid because God is with us.

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Religious Issues

Members of Religious Communities:

This is not an easy time for you, the members of consecrated life, the religious order Priests, Brothers and Sisters of the various religious congregations who are ministering in the Archdiocese of Hartford during this time. You face the same emotional experiences of transition as the clergy of the Archdiocese, our lay ministers and the staff, as well as the people in the parish where you are missioned to serve.

The Priests, Brothers and Sisters who are ministering in parishes may be affected by decisions made as a result of the recommendations / decisions that have brought about the proposed reconfiguration of the Archdiocese.

1. The Archbishop, as well as the Vicar for Religious as his delegate, will collaborate with the appropriate major superior of those religious orders who have members (Priests, Brothers, Sisters) engaged in a pastoral assignment at a parish that is being merged or closed, relative to their future status, ministry and assignment in the Archdiocese of Hartford.
2. The Office of the Vicar for Religious will make every effort to offer assistance, in collaboration with the appropriate major superior of those congregations involved, together with the Office of Human Resources of the Archdiocese of Hartford, to assist those whose positions have been modified in their continuation or eliminated.
3. Once the decisions regarding parish restructuring have been communicated, any religious who are engaged in ministry in those parishes will receive a newly revised, formal ministerial agreement signed by the pastor, the religious member(s) and the Vicar for Religious with copies of the signed agreement kept by each entity.
4. If a religious community is currently living in a parish building that is affected by reconfiguration, conversation with the Vicar for Religious, the major superior and the congregational representative in the local community will be part of a transition process for the residents. If helpful, the Vicar for Religious is willing to initiate the conversation with a religious community. If necessary, the community will be assisted in locating other housing accommodations.
5. In the event that, as a result of restructuring, there are major changes to a ministry that had been carried out by members of a religious community, and the community discerns that it can no longer fulfill that ministry, the major superior will formally notify the Office of the Archbishop and the Office of the Vicar for Religious. If the decision is to withdraw from the Archdiocese, the Vicar for Religious will communicate with the major superior regarding the necessary protocol.

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Lay Ecclesial Ministers in Transition

Lay ministers will be affected significantly by the parish closings, and mergers. Along with other parish staff, some may lose their position; others may find their responsibilities broadened, narrowed or expanded to include another parish, etc. This time in the life of the lay minister can be exciting, as new ministries and service are envisioned. It will also be stressful, as ministries and the vision that engendered them, come to an end. As discussions continue as to how best to implement the decisions of the pastoral planning process, it is essential that lay ministers take the time necessary to prepare pastorally, spiritually and personally for the challenges that will come their way.

Transition workshops offered by the lay Ministry Program for parish staff and parish teams regarding change, ministerial development and collaboration will be an excellent source of pastoral support for lay ministers and the ordained as they move through the many changes that will face them.

Lay ministers whose job responsibilities will change may want to take advantage of the many skills-based training programs offered by various archdiocesan offices. Other specialized programs, offered through the districts, our local Colleges / Universities and national organizations, may provide opportunities for lay ministers to expand their ministerial expertise and put them in contact with others with whom they can network and / or mentor as they expand their skills.

Being attentive to the skills brought to lay ministry can broaden the background individuals bring with them into a ministerial setting. However, skills alone are not enough as the challenges of this time of transition are experienced. It is just as essential to keep in mind the impact that change has on the spiritual and personal life of the lay minister.

During times of transition any time a lay minister spends in prayer, discernment, on retreat, and with a Spiritual Director are as essential as any of the other tasks expected of them. Without spiritual focus, the actions that transition will require of them will overwhelm not only the individual lay minister, but the community they serve. Individuals must, for the sake of their faith, their commitment to ministerial service in the Church and their identity as a lay minister, take the time needed to prayerfully process what this transition means for them and for their ministry. God often speaks to us through the internal chaos that change brings. To move through this chaos we all need the presence of centered, prayerful, open persons of faith to help us. Just as lay ministers may be called on to provide such a centered presence to the people they serve, they must attend to their own questions by seeking out persons and situations that will allow them to explore their spiritual development.

On the personal level, lay ministers will need the support of others who may be experiencing similar transitions and will have much to offer those who are transitioning with them. They will need to be attentive to their physical and psychological health as the stress of transition impacts them. They may also need to seek out new employment opportunities and refine their job search skills.

Peer support groups may be of significant assistance to them. Attention to communal opportunities for prayer and theological reflection, as well as honest assessment of the need to process stress can make the difference between a healthy transition and one that harms the individual emotionally, spiritually or psychologically. Lay Ministers seeking assistance and support during this time of transition should contact the Office of Religious Education, Evangelization and Catechesis:

Contacts: **Provost for Education, Evangelization and Catechesis**
 Sr. Mary Grace Walsh, ASCJ, Ph.D.
 467 Bloomfield Avenue
 Bloomfield, CT 06002
 Telephone: (860) 242-5573 ext.2662
marygrace.walsh@AOHCT.org

Catholic Schools

Parish closures or mergers will not necessarily require the closure of a parish school. The options available for a Catholic school to remain open following the closure of a sponsoring parish will vary according to the unique circumstances related to that particular school. The Office of Education, Evangelization and Catechesis will work with the school and the parish to consider the school's current viability, the best options for its continuation, and the most appropriate governance structure related to the school's new circumstances.

For all questions regarding Catholic Schools contact:

Dr. Michael S. Griffin,
Superintendent of Catholic Schools
467 Bloomfield Avenue
Bloomfield, CT 06002
Telephone: (860) 242-5573

Maria Maynard, Deputy Superintendent of Catholic Schools
maria.maynard@aohct.org, ext. 2658

Valerie Mara, Assistant Superintendent of Academics
valerie.mara@aohct.org, ext. 2656

Directors

Anne T. Clubb, Enrollment Management and Marketing
anne.clubb@aohct.org, ext. 2651

Laura McCaffrey, School Support and Academic Services
laura.mccaffrey@aohct.org, ext. 2664

Kenneth M. Przysiecki, CPA, School Finances
kenneth.przysiecki@aohct.org, (860)-541-6491

Provost for Education, Evangelization and Catechesis

Sr. Mary Grace Walsh, ASCJ, Ph.D.
467 Bloomfield Avenue
Bloomfield, CT 06002
Telephone: (860) 242-5573 ext.2662
marygrace.walsh@aohct.org

Foundation for the Advancement of Catholic Schools (FACS)

Cynthia Basil Howard, Executive Director
cbhoward@facshartford.org, ext. 7498

Marie Dussault, FACS Coordinator
mdussault@facshardford.org, ext. 7499

The Office of Religious Education, Evangelization and Catechesis

The Office of Religious Education, Evangelization and Catechesis:

- focuses on the mission and ministry of Jesus Christ and His Church in proclaiming the Good News of the kingdom of God;
- exists to assist the Archbishop in carrying out his catechetical responsibilities as Chief Catechist of the Archdiocese;
- is charged with the ministry of training, enabling, supporting and guiding parish catechetical leaders in their ministry of life-long Catholic faith formation.

Staff members of the Office of Religious Education, Evangelization and Catechesis are happy to be of service to you in a number of ways during this time of reconfiguration, transition and rebirth, providing consultant services for:

- Networking with other parishes / pastorates in order to strengthen parish programming
- Adult faith formation development and training
- Assistance with development of new catechetical roles necessitated by forming pastorates
- Program design and evaluation for parish catechesis
- Text and material Selection
- Volunteer management and recruitment
- Religion curriculum consultation
- Training and certification resources for parish catechetical leaders and catechists
- Training and certification resources for principals and teachers
- Sacramental preparation
- Catechesis for people with special needs / disabilities
- Intergenerational Catechesis
- Locating foundation grant opportunities for new and innovative programs
- Campus Ministry for students, faculty and staff on campuses

In the days and weeks to come, you will be asked to contribute as much information as possible about your various programs for religious education and faith formation. Whether your parish is closing or is merging with another in order to form a new parish, it is vitally important that you transmit pertinent details of your current programs to those who will be assisting you and your parishioners in this new configuration.

With that in mind, we have designed a form that will enable you to communicate a comprehensive picture of the faith formation opportunities currently available in your parish. Please provide as much information as possible. [Note: Opportunities for you to submit details regarding your parish sacrament preparation / celebration, as well as ministries with / for the disabled can be found elsewhere in the manual.]

Details concerning Religious Education / Formation Opportunities for Children, Youth and Adults in Your Parish

1. Do you have a Parish Catechetical Leader (DRE / CRE)? Yes _____ No _____

Please check (✓) appropriate:

- Full time or part time _____
- Paid staff or volunteer _____
- Responsibilities (Please list details, i.e., catechist recruitment, training, etc.)

2. Do you have a traditional PSR program? Yes _____ No _____

- # of students in each grade _____
- # of catechists - certified, Virtus trained, fingerprinted? _____
- Textbook series used _____
- Location and times of classes _____
- Do you have a separate junior high program? Yes _____ No _____

3. Do you use the program "Catechesis of the Good Shepherd"? Yes _____ No _____

- Students enrolled: Ages 3-6 years _____
- Students enrolled: Ages 6-9 years _____
- Students enrolled: Ages 9-12 years _____
- # of catechists – certified, Virtus trained, fingerprinted? _____

4. Do you offer Intergenerational Catechesis (GOF, etc.)? Yes _____ No _____

- # gatherings per year _____
- topics _____
- # of children _____
- # of youth / teens _____
- # of adults _____
- Do you have a planning team/s? Yes _____ No _____
- Resources (textbooks, etc.) used _____

5. Do you have a Vacation Bible School (VBS) program? Yes _____ No _____

- Do you have a team? Yes _____ No _____
- Location and times of gatherings _____

- # children / youth involved _____
- Ages / grade levels _____
- For parishioners only, or open to surrounding community? _____

6. Is home-schooling in religion an option for your students? Yes _____ No _____

- Do you have a process in place by which parents and parish coordinate efforts? Yes _____ No _____
- Resources used _____

7. Do you offer Adolescent Catechesis (High School)? Yes _____ No _____

- PSR type program Yes _____ No _____
- Within the context of total Youth Ministry Yes _____ No _____
- Textbook / resources used _____
- # of catechists - certified, Virtus trained, fingerprinted? _____
- # of students in each age / grade level _____
- Location and times of classes _____

8. Do you offer any Adult Faith Formation opportunities in the parish? Yes _____ No _____

If so, please list events offered in the past 12 months.

9. Do you offer religious education for those with special needs? Yes _____ No _____

If so, please go to the section of this Handbook which deals with services provided for people with Disabilities / Special Needs and enter details there.

10. At this time, are you collaborating with any other parishes / groups to provide religious education/formation? Yes _____ No _____

If so, please give details below.

Is there anything else you would like to communicate regarding religious education / faith formation opportunities in your parish?

For further assistance, please contact:

Contacts: **Provost for Education, Evangelization and Catechesis**
Sr. Mary Grace Walsh, ASCJ, Ph.D.
467 Bloomfield Avenue
Bloomfield, CT 06002
Telephone: (860) 242-5573 ext.2662
marygrace.walsh@AOHCT.org

Nicole M. Perone
Coordinator of Adult Faith Formation
(860) 242-5573 x2677
Nicole.perone@AOHCT.org

Volunteer Ministry and Parish / School Life Activities

Volunteer Ministry and Parish / School Life Activities

“Beyond the intimate community of family life, the parish is for most Catholics their foremost experience of Christian community, enabling them to express their faith, grow in unity with God and others, and continue the saving mission of Christ. We have seen a welcome renewal in all aspects of parish life and ministry, due in large measure to an informed and committed laity often encouraged by their pastors and priests imbued with the spirit of Vatican II.”

(Called and Gifted for the Third Millennium: Reflections of the U.S. Catholic Bishops on the Thirtieth Anniversary of the Decree on the Apostolate of the Laity and the Fifteenth Anniversary of Called and Gifted, 1995, United States Catholic Conference, Washington, D.C.).

Parish volunteers contribute in many ways to the vibrant pastoral life of their parish communities. Different from volunteers who donate time or money to secular charitable or professional organizations, a parish volunteer's service or ministry is intimately connected to their faith. By baptism, all are called to participate in the life of Christ. Volunteers use their God-given gifts in loving service to bring the Spirit of the Living Christ to the members of their parish communities and to the world beyond. It is vital that utmost care and respect be afforded both the person and the service of the volunteer.

Volunteers will have many questions and concerns about how they will be incorporated into a new parish, whether their volunteer service will be desired, and how the ministry will be coordinated in the new parish.

It is important to respectfully and carefully tend to the concerns of volunteer ministers as they transition from one parish to another. Transitions are never easy, but with prayer, sound planning and good communication, parishes honor the past contributions of their volunteers while inviting them to use their gifts in their new parish. The material that follows, while not exhaustive, is designed to assist parishes to identify, document and affirm the many ways that volunteers contribute to the vibrant life of our parishes. It is organized in the following manner:

1. **Listing** of selected ministries and situations in the parish where volunteers serve;
2. **Tools** to help parish staffs document information about the ministries, volunteers and special celebrations in their parishes in preparation for the transition; and
3. **Processes** that affirm the volunteers, acknowledge the value of their service to the closing parish, and invite their participation in the transition to service in the receiving parish.

Listing of Volunteer Service:

The following categories list some of the ministries and services that volunteers offer to their parishes. In addition to the categories listed below, it is important to remember that each parish community is a unique gathering of people from different ethnic groups, traditions and history. There may be parish or service projects that incorporate ethnic customs or neighborhood events. Honoring them, valuing them, and incorporating them into new receiving parishes (where possible) will go a long way to assure a smooth transition.

1. **Liturgical:** Eucharistic Ministers (at Mass and to the homebound or institutionalized), Readers, Ushers and Greeters, Music Ministers, Acolytes (youth and senior), Youth and Young Adult liturgical ministers, Sacristans or Liturgical Coordinators, Liturgy or Worship Commission, Art and Environment.
2. **Spiritual:** Spiritual Life Commission, Legion of Mary, Ministry of Praise (coordinators and the homebound parishioners), Ladies Guild, Altar and Rosary Society, Small Christian Communities, faith-sharing groups, devotional or prayer groups, parish library, book clubs, Moms ministry, Eucharistic Adoration, Holy Name Society, Cursillos.
3. **Social Concerns / Charitable Outreach:** Saint Vincent de Paul Society, Social Justice Committee, Prison Ministry, overseas Mission group, JustFaith group, Pro-Life group, faith-based community organizations, food pantry or homeless assistance, bereavement ministry, pastoral counseling, Elizabeth ministry, Parish Nurse, Environmental Concerns Committee, Hispanic Parish Social Ministry, Migrant Outreach, and other community outreach programs.
4. **Sacramental:** Rite of Christian Initiation of Adults / Children (RCIA/C) teams, Pre-Cana teams, Couples Ministry, Pre-baptism classes, Funeral Planning, Funeral Choirs, Funeral Lunches, First Eucharist / Reconciliation teams, Confirmation teams.
5. **Educational:** Parish Faith Formation for Children, Faith Formation for Adults, Youth Ministry, Parent-Teacher Association, Parish School volunteers, Education Commission, Adult Faith Formation committee, Bible study, Scouting, CYO teams.
6. **Parish Life:** Parish Pastoral Council, Parish Finance Council, Evangelization Commissions, Stewardship committees, Knights of Columbus, Knights and Ladies of St. Peter Claver, parish fraternal organizations, Sunday collection counters, parish festival or picnic committee, seasonal fundraising events (e.g., pumpkin sales, Christmas trees, baked goods sales, ethnic food sales, carnivals, etc.), bingo, volunteer maintenance, gardening, or snow removal service, parish connections to civic or ecumenical associations, parish special celebrations / neighborhood events, youth, women, men's parish retreats .

Tools for the Description of Ministries:

Four forms are included that will help the transitioning parishes or schools prepare for the smooth transition of the volunteers. Information regarding the confirmation of Safe Environment Training attendance and completion of a background check can be obtained by contacting the Office of Safe Environment and requesting a SE Training Report for the transitioning parish / schools.

1. **Administrative Overview of Parish Ministry** (see attached form) should be filled out by a member of the parish staff and will provide an overview of how the ministries and volunteer activities in the parish are organized, including recruitment, training, leadership, guidelines, and ongoing support. The completed form can be copied and given to each of the parishes in the area who will receive volunteers from the closing or merging parish. The form contains:
 - a) Name of parish and contact person with phone number;
 - b) Recruitment and application process for volunteers;
 - c) Safe Environment Compliance Requirements;
 - d) Initial training by the parish or the Archdiocese;
 - e) Leadership of the ministries; staff liaison for each group;
 - f) Written guidelines;
 - g) Annual blessing of volunteers, appreciation or recognition event, or days of prayer and reflection;
 - h) Other pertinent information about the parish's volunteer ministry.

2. **Individual Ministry Data Sheet** (see attached form) should be filled out by the chairperson or leader(s) of each ministry and activity in the parish. It will give specific descriptions of the activities relating to that individual ministry, i.e., recruitment, training, leadership, guidelines, and ongoing support. It will also describe the mission of the group, the duties and time commitments, as well as list the names, addresses, phone numbers, and email addresses of the volunteers who serve in the ministry. The Data Sheet contains:
 - a) Name of ministry / service and parish name;
 - b) Name of lay leader of the ministry and staff liaison and phone numbers;
 - c) Mission, duties, and time commitment of volunteers in the group;
 - d) Recruitment and screening of volunteers;
 - e) Initial and ongoing training and support;
 - f) Written guidelines;
 - g) Other pertinent information;
 - h) Current ministry volunteers: name, address, phone, email.

3. **Parish Special Celebrations / Neighborhood Events** (see attached form) should be filled out by the pastor or the parish staff. In addition to the liturgical and sacramental celebrations in the life of every parish community, there are occasions that build community and connect the parish to the ethnic communities and local neighborhoods of which they are a part. The purpose of this form is to accurately and completely describe the parish celebrations or neighborhood events so that they are not lost during the process. Awareness of these events and sensitivity in trying to incorporate them into the community life of the receiving parishes will be helpful to the transition process of parishioners who are already grieving the loss of their parish. The events will vary; be sure to look through the parish calendar. Here are a few suggestions:

- a) **Religious:** celebrations in honor of the parish's patron saint, a procession through the neighborhood in honor of a feast day or an event in Jesus' life (e.g., Corpus Christi, Good Friday), celebration of Marian feasts (e.g., Guadalupe, Assumption), Eucharistic Devotions (40 Hours), novenas, special devotions related to a particular ethnic community;
- b) **Ethnic / Cultural:** an ethnic food dinner or cultural festival, the sale of ethnic foods or baked goods, the celebration of holidays particularly significant to the community;
- c) **Neighborhood / Seasonal:** pumpkin sales, Christmas tree sales, parish picnic or festival, Mardi Gras;
- d) **Office of Safe Environment Data Sheet** (see attached form) should be filled out by the person in the parish / school who has been designated as the Office of Safe Environment Coordinator for the transitioning parish / school. This Data Sheet will describe the procedures for ensuring that all personnel of the transitioning parish / school are in compliance with the Policies and Procedures of the Office of Safe Environment.

Processes Relating to Volunteers:

The closing or merging parishes should meet with all of their volunteer ministers. If the total number of parish volunteers is small and can be accommodated at one time in a large parish meeting room, a gathering could be convened that begins with prayer and appreciation expressed for the faithful service of the volunteers. Then the volunteers could break off and meet with their individual ministry leaders in separate groups to share stories and complete the *Individual Ministry Data Sheet* together.

If the number of volunteers is large, a blessing in thanksgiving for the volunteers' service could be given at all of the Masses on a weekend, using or adapting the blessings in Part IV of the *Book of Blessings*. Each parish ministry or service group could use their next regularly scheduled meeting to share stories about their ministry experiences and complete the *Individual Ministry Data Sheet* together. A committee of parish leaders and a staff member could be convened to oversee this process and insure that all of the groups comply and that the process is handled with care and concern.

After the forms are completed, they should be photocopied for all of the staffs of the closing and receiving parishes who will meet to discuss the information about the special celebrations, neighborhood events and volunteer ministries. The purpose of the meeting is to develop a plan to incorporate and continue the service of the ministers at the receiving parish(es). Input from members of the Parish Pastoral Council may also be helpful in this process. After an initial plan is created, each parish staff should meet with the ministers at their respective parishes to share the plan and elicit their input. It is important to acknowledge that the transition process will not be easy and may be a bit confusing at first. What is needed is patience and charity. Prayer at these meetings could employ Scripture readings that describe some of the difficulties and joys during the beginnings of the Christian communities, e.g., Acts 2:42-47; Acts 4:32-35; Romans 12:9-18; Romans 15:1-6; 1 Corinth 1:10; 1 Corinth 3:5-9.

During the transitional months, it would be wise for the receiving or new parish to host meetings of the individual ministries so that the volunteers who serve in that ministry from all parishes (closing, new and receiving) could begin to get to know each other and socialize, share their stories, histories and values and iron out any details of the procedures relating to the ministry. Listening sympathetically to the shared grief over the closing of the parishes and continuing to focus on the essentials of the ministry that unite all who serve is very helpful.

Prayer is essential to this process of merging ministries. As a parishioner from a closed parish said, “Being angry, sad, and frustrated were not good things. I had to change my thinking. I turned my feelings around through prayer, by being informed, by being involved, and by communication with others.”

“The ministries which exist and are at work at this time in the Church are all, even in their variety of forms, a participation in Jesus Christ’s own ministry as the Good Shepherd who lays down his life for the sheep, the humble servant who gives himself without reserve for the salvation of all.” [No. 21] (Pope John Paul II. *The Vocation and Mission of the Lay Faithful in the Church and in the World / Christifideles Laici*, 1988)

Contact: The Office for Catholic Social Justice Ministry is available to help parishes restructure their social ministries, or develop new ministries to respond to the needs of the parish and greater community. (860) 242-5573 ext. 2688

1. Who leads the ministries? Is there a staff liaison for each group?
2. Does each ministry have a set of written guidelines?
3. Is there an annual blessing of volunteers or an appreciation or recognition event for volunteers? Is there a day of prayer and reflection for ministers?
4. Any other information about the parish's volunteer ministry?

Name of Parish: _____ City / Town _____
 Person responsible for collecting this data: _____ Position: _____

Contact: The Office for Catholic Social Justice Ministry
Lynn Campbell, Director
(860) 242-5573 ext 2688

Individual Ministry Data Sheet

This form should be filled out by the chairperson or leader(s) of each ministry and activity in the parish. It will give specific descriptions of the activities and guidelines relating to that individual ministry, as well as list the names, addresses, phone numbers and email addresses of the volunteers who serve in the ministry.

Name of ministry / service _____

Parish name _____ Staff Liaison _____

Name of Lay Leader _____ Phone _____

1. What is the mission of the group? What are the duties? What is the time commitment and is there a term of service for the volunteers?

2. How are volunteers recruited and screened?

3. Is there initial training and ongoing support for the members?

Ministry / Parish _____

4. Does the group have written guidelines?

5. Do you wish to share any other pertinent information?

6. Current ministry volunteers: name, address, phone, email (Use additional sheet if needed.)

Contact: The Office for Catholic Social Justice Ministry
Lynn Campbell, Director
(860) 242-5573 ext. 2688

Parish Special Celebrations / Neighborhood Events

In addition to the liturgical and sacramental celebrations in the life of every parish community, there are occasions that build community and connect the parish to the ethnic communities and local neighborhoods of which they are a part. The purpose of this form is to accurately and completely describe the parish celebrations or neighborhood events so that they are not lost during the process. Awareness of the events and sensitivity in trying to incorporate them into the community life of the receiving parishes will be helpful to the transition process of parishioners who are already grieving the loss of their parish.

The events will be varied, therefore, be sure to look through the parish calendar. Here are a few suggestions:

1. **Religious:** celebrations in honor of the parish's patron saint, a procession through the neighborhood in honor of a feast day or an event in Jesus' life (e.g., Corpus Christi, Good Friday), celebration of Marian feasts (e.g., Guadalupe, Assumption), Eucharistic Devotions (40 Hours), novenas;
2. **Ethnic / Cultural:** an ethnic food dinner or cultural festival, the sale of ethnic foods or baked goods;
3. **Neighborhood / Seasonal:** pumpkin sales, Christmas tree sales, parish picnic or festival, Mardi Gras.

Name and Description of Event	Date(s) Held and Frequency	Contact: Name(s) and Phone Number

Office of Safe Environment (OSE) Data Sheet

This form should be completed by the person designated as the Parish / School OSE Site Coordinator. The OSE Coordinator is responsible for implementing the AOH procedures to ensure that all personnel (employees and volunteers) of the parish / school are in compliance to the Charter for the Protection of Children and Young People. This form will show how the parish / school implemented all Policies and Codes as established in the OSE Handbook. The completed form and any attached documentation can be copied and distributed to each of the parishes / schools in the deanery which will receive personnel from the parish / school which is to be merged or closed.

Name and Town of Parish: _____

Parish Email Address: _____ Parish Phone: _____

Safe Environment Site Coordinator: _____

Coordinator Email Address: _____ Coordinator Phone Number: _____

Safe Environment Data and Records

A. OSE training report / compliance records for Adult Personnel:

- i. Has a current Parish / School training report been requested from the OSE?
- ii.
 - a. Are the names of all personnel, in every ministry, who has ongoing contact with children or vulnerable adults, listed on this report?
 - b. If a name is not on this report, please write it on the Training Report
- iii. Edits to this current report should be made and returned to the OSE for updating.
- iv. Edits should be as follows and marked to the left of the person's name directly on this training report:
 - I/A – Person is no longer in active ministry at the Parish / School;
 - D – Person is deceased;
 - X – You do not recognize this person as Personnel of your Parish / School;
 - N/C – person will not be registering with the merged parish and should be made inactive.
 - T- Transfer data of this person to the Parish / School that will be receiving them.

Employment Guidelines

Insurance Coverage and Reduction in Force

The ability for Catholic Mutual to provide employment practices liability protection for a claim made by a terminated employee is a determination made on a case-by-case basis by Catholic Mutual.

For protection to apply, Catholic Mutual requires that “prior to dismissal, discharge or termination you have sought and followed the advice of a qualified attorney or other professional person or service that we have approved. If the requirement to seek and follow the advice of a qualified attorney prior to dismissal, discharge or termination is not followed, coverage will not apply.”

Discussion of the situation with either the Director of Human Resources for the Archdiocese, or Archdiocesan Legal Counsel meets this requirement. This requirement covers any instance when the employer is initiating a detrimental change in employment status for an employee. This includes layoffs, non-renewals, reduction in force, cuts in hours, termination, or when the employer suggests or gives the employee an opportunity to resign.

Policy (See Section 22)

In the event of a reduction in force in a merged parish, the following criteria shall be used in determining which staff must be terminated; the best interests of the parish, qualifications or suitability for the job, overall job performance and seniority. Only if no existing employees meet the qualifications for the job shall the parish open the application process to a wider population. The parish should contact the Archdiocesan Human Resources Director for any candidates who are available due to other parishes closing or merging.

In the event of a parish suppression and joiner of its territory, assets and liability to an existing parish, the existing parish may not have the same freedom as a merged parish to lay off or terminate present employees in favor of what it perceives to be better qualified employees laid off by the suppressed parish. If the parish wishes to terminate or lay off employees in such a situation, then it should consult the Human Resources Director.

The pastors/administrators of parishes that are closing, due to the suppression or merger, should cooperate with the pastors/administrators of existing or merged parishes so that jobs in the latter may be offered to employees laid off by the former before the last scheduled day of an employee who is laid off.

As parishes begin to prepare for closing, pastors and administrators should not enter into contracts with employees. Parishes are bound by contracts, and so the terms thereof, and may deal with the issue of severance pay in the contract in a specific provision or according to the term (length) of the contract.

This policy only applies to reductions in force arising out of parish consolidation; it does not apply in other situations. This policy applies to all lay employees who are at-will employees and it may apply to permanent deacons who are at-will employees and who have a position that is not a ministerial position; questions concerning permanent deacons should be referred to the Vicar for Clergy. This policy would only apply to Religious who are at-will employees.

Notification

An employee whose employment is terminated due to a reduction in staff or lack of work, will be given a minimum of two (2) weeks written notice or, at the discretion of the pastor/administrator, two (2) weeks work of pay in lieu of notice. Although the notice must be in writing, the employee who is terminated due to reduction in staff or lack of work should be told in person first, and then the notice should be followed up in writing.

Severance

It is understood that the parishes find themselves in varying financial circumstances, so it does not seem prudent to have a uniform severance payment policy. Rather, a minimum and maximum are proposed, and it is up to the parish to fit their scales of payment in line with that. No parish should pay a severance of less than two weeks' pay. Therefore, two weeks is the minimum severance pay.

Employees will be required to sign a severance agreement, which will contain a release of claims in order to be eligible for a severance. Please contact the Human Resources director who will provide you with a severance agreement.

Fairness would seem to demand that those who have worked many years at a parish would get more severance pay and those who have worked fewer years would get a lesser severance pay. Each parish should set a maximum severance pay; in cases of financially distressed parishes, the maximum and the minimum may be the same, so that all employees, no matter how long that they have been employed would get the same severance pay. A severance schedule is below:

<u>Years of Service</u>	<u>Weeks of Severance Pay</u>
Less than one year	None
1 to 9 years	2 weeks
10 to 14 years	3 weeks
15 or more years	4 weeks

Severance pay will be pro-rated for eligible part-time employees. Please note that part-time employee who work less than twenty (20) hours a week are not eligible for severance pay (see section below, #5).

Employees Eligible for Severance Pay

Note: Employees who were employed by a parish which has been merged or suppressed and immediately become employed by the remaining parish shall not lose seniority, or accumulated vacation or sick time from their previous jobs.

Except for the following, each employee who job is eliminated as a result of a reduction in force is eligible for severance pay and the below listed financial and non-financial benefits:

1. All employees who fail to complete their last scheduled day of service (i.e., those who take another job before their final scheduled work day);
2. All employees who are offered a comparable job in another parish, in Archdiocesan administration, or in an Archdiocesan school or facility prior to their final scheduled work day. It should be noted that employees, who go to work for another parish or another entity, start the new job as a new employee do not have any seniority nor any accumulated vacation or sick time from their previous jobs. Employees who were participants in the Archdiocese of Hartford sponsored Pension Plan for Lay Employees in their former jobs, are covered by the same pension plan in their new jobs, and provided the employee works the required hours to participate in the pension plan. The status of those individuals in the pension plan will likely not change, depending on length of service and any breaks in service. Contact the Human Resources Benefits Office with any questions and a final determination on pension status;
3. Employees who had signed employment contracts;
4. Employees with less than one year of service on their last scheduled work day; and,
5. All employees working less than 20 hours per week.

Payment of Severance

The amount of severance paid will be net of all applicable State and Federal withholdings and employee contributions toward health, dental and vision coverage, and will be paid out in a lump sum following the last date of employment on the next regularly scheduled pay day.

Accrued Vacation

Payment will be made for all earned but unused vacation time in the final paycheck and will be subject to all applicable State and Federal withholdings.

Benefits

All benefits, including health insurance, life insurance, and pension will continue through the severance period in full month increments (i.e., if the separated employee receives four weeks of severance, benefits will continue to the last day of the month covered by the severance pay.). Health, dental, and vision coverage may be continued for up to six months following the severance period with the employee responsible for paying the full monthly premium.

Unemployment

Any employee who loses his or her job as a result of parish consolidation may apply for unemployment compensation. Not all parishes participate in CT unemployment compensation, and not all employees are eligible for unemployment compensation. Eligibility for unemployment benefits and the amount of any benefits are determined by the State of CT Unemployment Compensation Office.

Transition Assistance

Employees are encouraged to apply for open positions throughout the Archdiocese of Hartford. Pastors/Administrators are encouraged to post open positions on the Archdiocesan website. Contact the Human Resources Director who will help draft the position openings and post on the Archdiocesan website.

Contacts

For all Termination Issues, Labor Relations Issues, Unemployment Issues, Career Resource Issues, Employee Benefit Issues, contact:

Karen Kean

Director of Human Resources
Archdiocese of Hartford
467 Bloomfield Avenue
Bloomfield, CT 06002
Phone: (860) 541-6491 ext. 7491
Email: karen.kean@AOHCT.org
Fax: (860) 241-0827

For all questions regarding employee benefits and pension plan contact:

Lesli Anderson

Group Benefits Coordinator
Archdiocese of Hartford
467 Bloomfield Avenue
Bloomfield, CT 06002
Phone: (860) 541-6491 ext. 7458
Email: Lesli.Anderson@AOHCT.org

Health Care Services

For all questions regarding health care services please contact:

Lesli Anderson

Group Benefits Coordinator

Archdiocese of Hartford

467 Bloomfield Avenue

Bloomfield, CT 06002

Phone: (860) 541-6491 ext. 7458

Email: Lesli.Anderson@aohct.org

Development Issues

Archbishop's Annual Appeal

We ask that parishes being consolidated communicate to our office any procedures relating to the Archbishop's Annual Appeal. Please contact the Appeal office regarding any questions or assistance with the Appeal, or with donors and prospective donors who need assistance:

The Appeal Office
Contact: Tina Poet
Telephone: (860) 781- 2550
Fax: (860) 828-7400
Email: tinap@letterconcepts.com

Office of Development

The Office of Development asks that parishes being consolidated communicate to our office any questions or assistance relating to:

- Planned Gifts (Wills, Bequests, Charitable Gift Annuities, Trusts, Life Insurance, Charitable IRA Rollovers, Estate gifts)
- Grant Applications

Office of Development
467 Bloomfield Avenue
Bloomfield, CT 06002
Telephone: (860) 547-0513
Email: Developmentoffice@aohct.org

The Hartford Bishops' Foundation

For any business or assistance relating to the Hartford Bishops' Foundation please contact:

The Hartford Bishops' Foundation
467 Bloomfield Avenue
Bloomfield, CT 06002
Telephone: (860) 913-2668
Email: John.laframboise@aohct.org

Finance Issues and Procedures

In a parish closing, the business affairs of the parish corporation must be brought to a conclusion. In a parish merger, the business affairs of the merging parish corporations continue to be managed under the direction of the pastor / administrator of the newly merged parish. Accordingly, this section covers the process of addressing and assessing the business matters of parish corporations that are merging or are closing.

Due to the expected differences that will arise in merger and closure situations, special and specific attention must be given to each individual merger and closure situation. New pastors or administrators in merger or closure situations should contact the Parish Financial Services Office, the Archdiocesan Department of Property and Assets, and Archdiocesan legal counsel for consultation as soon as possible. Parishes that are merging should:

- Complete the process of reviewing financial records: In accordance with the records retention policy, records should be sorted into the records that are required to be retained and the records that may be discarded. The records retention policy can be found in this manual in the section titled **Archives and Records**. The records to be retained should be boxed and labeled. Arrangements should be made to destroy, by shredding, the records that will not be retained. The parish can hire a company to securely perform this task or may utilize existing staff and equipment to gradually shred the records that must be destroyed.
- Streamline bank accounts: Unnecessary bank accounts should be closed. The newly merged parish corporation should start out with only the bank accounts that are absolutely necessary.
- Complete worksheets: The completed worksheets contained in this Section 22 will provide valuable information to the pastors or administrators in the merger and closure process.
- Evaluate facility equipment and leases: This information will be valuable in assisting the pastor or administrator in considering possible alternative uses for buildings and equipment that will be vacated after the merger is completed.
- Discard unwanted and unneeded items: A parish inventory should be performed of all sacred objects, religious objects, and secular objects. The preparation of the parish inventory should be accomplished in collaboration with the Archdiocesan Director of Property and Assets. All closets, cupboards, and storerooms should be cleared of unusable secular items. If the parish corporation is selling realty, the contract for sale must be reviewed to determine which secular items must remain at the property because they are being sold with the property (e.g. appliances). Please keep in mind that all parishes, whether closing or merging, must comply with the directives of the Chancery in regards to disposal of sacred and religious items. Sacred goods and religious articles are covered in another section of this manual and must not be discarded without consultation with the Chancellor.
- Compile all documentation regarding restricted gifts received by the parish.

The procedures for concluding the business affairs of a parish require timely attention. Very detailed planning must take place so the final days of a parish can be orderly. A great deal of planning may be accomplished many months prior to closing, although much will still have to be dealt with during the final weeks and days of the parish's operation and after the closing Mass.

The worksheets that follow this section are required to be completed by both closing and merging parishes. They will be a valuable resource during the closing or merger process and will aid in making the process as efficient and effective as possible. These procedures are also needed for the parish and the Archdiocese to be fully accountable to the parish community.

Please complete the worksheets pursuant to the following schedule. If more than one page is needed to prepare a complete report, please photocopy the form and attach as many pages as required.

The procedures for concluding the business affairs of a parish require timely attention. Very detailed planning must take place so that the final days of a parish can be orderly. There is a great deal of planning that can take place many months prior to closing, while some items must be dealt with during the final weeks and days and other items will be resolved after the closing Mass.

Worksheet 1	Bank and Investment Accounts	When closing announcement is made
Worksheet 2	Unpaid Bills Listing	On the final day of business
Worksheet 3	Service Contracts / Agreements	When closing announcement is made
Worksheet 4	Lease and / or Rental Agreements Where Parish is Lessee	When closing announcement is made
Worksheet 5	Lease and / or Rental Agreements Where Parish is Lessor	When closing announcement is made
Worksheet 6	Organizations Using Parish Property	When closing announcement is made
Worksheet 7	Charge Accounts	When closing announcement is made
Worksheet 7A	Credit Cards	When closing announcement is made
Worksheet 7B	Memberships / Subscriptions	When closing announcement is made
Worksheet 8	Restricted Accounts / Gifts / Assets	When closing announcement is made
Worksheet 9	Employee Listing	At least two months before effective closure / merger date
Worksheet 10A	Parish Office Inventory	Check with Director of Property and Assets re outsourcing inventory obligations
Worksheet 10B	Maintenance Equipment Inventory	Check with Director of Property and Assets re outsourcing inventory obligations
Worksheet 11	Parish Sacred Objects Inventory	Check with Director of Property and Assets re outsourcing inventory obligations
Worksheet 12	Automobiles	When closing announcement is made
Worksheet 13	Checklist of Financial Records	On the final day of business
Worksheet 14	Contact Person List	On the final day of business
Worksheet 15	Vendor Listing for 1099's	On the final day of business
Worksheet 15A	Vendor Check List	On the final day of business

Although we understand that there are many things that need to be done during this difficult time, it is essential that the process commence immediately. The amount of time it takes to complete the closing process can be lengthy.

Please send completed worksheets to the Archdiocesan Parish Financial Services Office and to the Department of Property and Assets within 30 days of the closing announcement.

GOVERNMENTAL FILINGS

In a merger of parishes, specific documentation must be filed with various governmental entities. Until such time as Parish C is incorporated civilly, all temporal work will be managed by the pastor / administrator through the corporate entities of Parish A and Parish B. In other words, ongoing operations shall continue by the two existing parish corporations and decisions will be made in the normal course of business, with the intent to transition the business and financial operations of Parish A and Parish B into the newly formed Parish C, once it is incorporated civilly.

Parishes must continue to follow all existing policies and procedures of the Archdiocese, as well as the laws of Connecticut, in conducting their business practices.

Legal counsel for the Archdiocese of Hartford will represent the parish in securing the incorporation, merger, or dissolution of the religious corporation, in compliance with the Religious Corporations Act of Connecticut. This process will entail the preparation and submission of specific corporate documentation. In addition, Archdiocesan legal counsel shall obtain a new tax identification number for the new parish corporation, and shall file necessary governmental filings with the Internal Revenue Service, the Department of Revenue Services, and the Department of Labor for the merged or new parish corporation.

BANK AND INVESTMENT ACCOUNTS

The pastor / administrator and the parish accountant and / or bookkeeper shall compile a listing of all parish and parish organization bank accounts, including investment, brokerage, and d/b/a accounts. The listing will include:

- The name of the bank of investment institution;
- Account number;
- Account signatory(ies);
- The current balance (See Worksheet 1 - Bank and Investment Accounts).

The pastor / administrator shall collect copies of the bank statements and the corresponding monthly book reconciliations for all bank accounts, for the period beginning on January 1 of the year in which the merger or closure will occur.

Restrictive Gift Accounts

The pastor / administrator must establish a separate file for each restrictive gift account. That file will identify funds in the bank accounts, if any, that are restricted in use by a donor. Restricted gifts must be documented on Worksheet 8. Any question regarding the assignment or repatriation of restricted funds, once the merger takes place, should be submitted to the Finance Office of the Archdiocese and Archdiocesan legal counsel for a review of the restriction.

Each restricted gift file must contain information regarding the source of the funds from which the account was established, a history of why the fund was established, a copy of the agreement stating the purpose of the fund and documenting any restrictions on the fund, and documentation that any restrictions on the fund have been satisfied. Any correspondence regarding activity in the account must also be included. All account statements must also be in the file. The authorized signers on the account as well as the mailing address must be changed as of the last date of operation.

Non-restrictive, Investment, and Associated Organization Accounts

The parish should seek to have all non-restricted savings, checking, investment, and associated organization accounts (except PACT investment accounts) closed as soon as is practicable and deposit these funds into the parish operating account. Documentation from the banking or investment institution confirming the closure of the account should be retained by the parish for its records. The pastor / administrator, with the assistance of the Parish Financial Service Office, shall determine how such investment funds and associated organization funds should be reinvested by the new parish. The parish shall reinvest and reallocate these funds, if needed, once the new parish (Parish C), or the merged parish, is operational. PACT accounts should enter into a new investment agreement with US Trust in the name of the new parish.

Please note that the final date of business will be different from the date the final Mass is held. It is necessary to have additional time after the closing Mass to wind down the business affairs to perform such tasks as making the final offertory deposit, paying all the invoices for the costs incurred for the final Mass, performing the final bookkeeping tasks, and the preparation of the final parish report.

Once it is announced that the parish is closing or merging, all old outstanding checks listed on the monthly reconciliation must be examined. If the checks are to current vendors, they must be contacted and an investigation conducted by the bookkeeper as to why the check had not been cashed. Checks on the outstanding list should be referenced against checks that have been voided and re-issued to make sure they are not being listed as outstanding when in fact, they have been voided. Individuals with checks outstanding must be contacted and an inquiry made as to why the check was not cashed. In both cases, the bookkeeper should tell the party that the account will be closed and the check should be cashed immediately. The goal is to have all checks cleared by the final date of business.

The main operating account should remain open if all checks written in the final days have not cleared, or if the parish's payroll service has to withdraw funds for the payment of payroll or payroll taxes. Any automatic payments must be cancelled before closing the main account. If the parish has certificates of deposit that will mature after the final date of business, they should remain open, the signers and mailing address changed, and statements or passbooks forwarded to the newly merged parish with the maturity date clearly identified. The mailing address of the certificates of deposit can be changed before the final date of business. Once the merger or closing date has been determined, no new certificates of deposit can be opened. Existing certificates should be redeemed when due, with the money going to the operating account of the merged parish. If the parish is closing, it should contact the Archdiocesan Parish Financial Services Office for assistance with the Certificates of Deposit.

Safe Deposit Boxes

Safe deposit boxes should be inventoried and the box closed. Prior to closing the safety deposit box, an inventory of the contents must be performed by two people. The contents should be placed in a tamper evident bag for delivery to the merged parish or, if the parish is closing, pursuant to the direction regarding assets issued by the Chancery.

Stock Certificates

Any stock certificates held by the parish on site should be liquidated as soon as practical and the funds placed in the main operating account. This relates to miscellaneous, general small stock holdings. For larger investment accounts, contact the Archdiocesan Parish Financial Services Office. If you need help in liquidating stock certificates, please contact the Archdiocesan Finance Office. The Archdiocese of Hartford has an agreement with a local broker to handle such transactions.

If the parish has stock in book entry (this means the parish owns stock, but there is no actual physical certificate held on site or issued by the company), the stock should also be liquidated and the proceeds placed in the main operating account. All stocks and mutual funds must be liquidated before the final date of business if the parish is closing. If the parish is merging, all stocks and mutual funds, except those held in the PACT account, should be liquidated.

Opening of Bank Accounts for the New Parish (Parish C)

Once Parish C (the new parish) has been incorporated, the pastor / administrator shall open a parish operating account and other accounts. The parish corporation will appoint a new signatory for these accounts by Corporate Consent. Archdiocesan legal counsel can provide documentation required by the banking institution to activate the new bank accounts.

Once the bank accounts for Parish C are opened, the final bank statements for Parish A and Parish B shall be reconciled and the parish bookkeeper or office manager will contact all outstanding check holders to request that the checks be deposited immediately and to notify them that the parish bank account will be closed. Bank accounts of Parish A and Parish B should be closed as it is practical.

CATHEDRATICUM AND CSSP

When a parish is merged into a new parish (parish C), both Cathedratium and CSSP become the liability of the new parish which may have two or more operating sites. If a parish is closed or ceases to have Sunday Mass, then that closed parish pays its remaining Cathedratium and CSSP due upon the date of closing or soon thereafter its closure.

OUTSTANDING DEBT

The pastor / administrator should compile the listing of all outstanding (unpaid) bills of local vendors, independent contractors, etc. (Worksheet 2 – Unpaid Bills Listing).

It is the responsibility of Parish C to settle all outstanding bills or invoices that cannot be paid by Parish A or Parish B because of insufficient funds. In the event that Parish C does not have the resources to meet the outstanding bills and invoices without affecting its ongoing operations, the pastor / administrator of Parish C should contact the Finance Office to request support from the Archdiocese. Financial support provided by the Archdiocese will be in the form of a loan. The parish will issue a note in favor of The Hartford Roman Catholic Diocesan Corporation that carries prevailing interest rates which indebtedness will be secured by parish property.

FINANCIAL REPORTING

The parish pastor / administrator and parish staff, with the assistance of Parish Financial Services, shall complete a final accounting of Parish A and Parish B. At the discretion of the pastor / administrator, the parish bookkeeper or business manager may be retained on a short-term contract to complete filings and postings related to the merger.

The parish bookkeeper or business manager or accountant will prepare the final financial report for the last month of operation of Parish A and of Parish B. All asset transfers for both the merging and new parishes must be reflected on financial reports to be submitted to the Archdiocesan Finance Office within sixty (60) days of the date that the parishes merge or the parish closes.

CHARGE ACCOUNTS AND CREDIT CARDS

The pastor / administrator will compile a list of all parish charge accounts and credit cards with both local and national companies, including the name of the institution, address, account number, approved parish signatories, and current balance (using Worksheets 7 and 7A - Charge & Credit Accounts). The balance on each charge or credit card account should be paid in full and the account closed prior to the merging or closure date of the parish. The pastor / administrator must ask for confirmation from the banking institution, credit card company or vendor that the account is closed and the card canceled as of the specified date and the written confirmation should be retained with the final statement.

VENDOR CONTRACTS AND AGREEMENTS

When a parish is contemplating merger or closure, it must NOT enter into written contracts with vendors, unless such contracts include a termination clause that the parish may exercise in the event of parish merger or closure. All service contracts or agreements currently in force should be listed using Worksheet 3 - Service Contracts / Agreements).

Early termination of a lease may cause damages to be assessed pursuant to the terms of the lease. Careful examination of lease provisions is necessary so that proper notice for equipment leases may be given and to ensure that the lease will not automatically renew on a certain date. Establishing the effective date of a lease termination should be considered carefully, as the parish may need the leased equipment to continue operations between the time of the announcement that the parish is closing or merging and the actual last day of business or merger date. In the event the parish is merging, consideration should also be given to whether to retain leased equipment for use in the combined parish.

Service contract vendors should be notified in writing of the date of merger or closure of the parish and the provider should prepare to discontinue service by that date. The pastor / administrator must request confirmation from the vendor that the service will be discontinued on the specified date. Among those vendors to be notified are the bulletin company, the envelope supplier, and the website host. A file must be prepared for each piece of equipment that is leased. The file must contain a copy of the lease agreement, a copy of the financing agreement, all operating manuals, warranty information, and a copy of any service agreements for the leased equipment. It should also include the amount of the service agreement payment, the frequency of the payment, any remaining term of service to which the parish is obligated, and contact information for vendors supplying service contracts. The date that notice must be received by the lessor should be clearly indicated in the file that contains all lease information. Legal counsel may be contacted to assist with termination of tenant or equipment leases. A copy of each vendor notification letter and the confirmation notices from the vendors must be retained in the file for that equipment.

If the parish is to be closed, the file is to be forwarded to the Archdiocesan Office of Property and Assets. If the parish is to be part of a merger, the file would be forwarded to the new parish.

Worksheet 3 pertains to service agreements. It should be completed as soon as the announcement is made regarding the parish's future to help the parish evaluate considerations and options for termination.

Cable television and satellite services must be cancelled prior to closing. All equipment must be returned to the provider, if required, before the last day of business. All internet connection services should be cancelled as of the last day of business.

The telephone service to the parish for voice lines should be cancelled as of the last day of business. If the parish has voicemail through the telephone company, the mail box(es) should be cleared and terminated as of the last day of business. If the parish uses a telephone line for a security system, it is extremely important to make certain that the line that is used for system communications remains active. The address for the bill for that line must be changed.

The pastor / administrator should NOT CANCEL these services or agreements:

- Alarm system
- Electrical service
- Landscaping company
- Oil or gas company
- Snowplowing company
- Telephone lines for security
- Water and sewer

The pastor / administrator, with the assistance of the Archdiocesan Office of Property and Assets, if needed, may arrange with these vendors to assign the contracts to the new parish at the time or in advance of the day of merger. Until such time as the assignment is completed, the contract obligations shall be met by the parish that is the party to the service contract with the vendor. There should be no cessation in the services provided to the parish under these contracts. It is permissible to have the vendor terminate the existing contract and replace it with a new contract with the new parish.

The pastor / administrator should also prepare a detailed list of all equipment that is leased or rented by the parish (see Worksheet 4 - Lease and / or Rental Agreements). The list should include a copy of the lease or rental agreement for the equipment. By or before the day of merger, the pastor / administrator will arrange with the lessor to terminate the agreement and return the equipment. Additional costs may be incurred as a result of early termination per any written agreement that is in place. If there are difficulties terminating leases, the pastor / administrator should work with the Archdiocesan Office of Property and Assets and Archdiocesan legal counsel, if needed, to address such difficulties.

LEASES OF PARISH PROPERTY

If the parish leases its property and is merging, written notice should be given to tenants to make their rental payments payable to the merged parish and to send their monthly rent to the parish office of the merged parish.

If the parish is closing and there is a tenant remaining in the building whose lease will not be terminated, the parish should contact the Department of Property and Assets regarding oversight, and should contact the Archdiocesan Parish Financial Services Office to determine how future rental payments will be handled and to obtain the address where payments should be sent. Written notice regarding future payments should be given to the tenant in accordance with the lease terms or early in the process.

Worksheets 5 and 6 pertain to leases. They should be completed as soon as the announcement is made regarding the parish's future to help the parish evaluate considerations and options for termination.

OCCASION RENTALS

If the parish is to be closed and the parish rents its facilities for outside events such as wedding receptions and community or similar events, the parish must contact each party that has an event booked at the parish's facility. The parish needs to inform the party that the parish is scheduled to be closed prior to the date of their event. As soon as the closing date is known, the calls to the user should be made. The parish must offer any assistance possible to help the party locate another facility for their event. In the event the parish merges and the site selected will still be available for rental, the party should be notified that the parish will be merged before the date of their scheduled event, and that the scheduled event can go forward as planned.

MEMBERSHIPS AND SUBSCRIPTIONS

The pastor / administrator will complete the listing for parish memberships and subscriptions in effect (see Worksheet 7B - Memberships & Subscriptions). The pastor / administrator should notify the vendor to cancel the memberships and / or subscriptions prior to the merger date of the parish. The pastor / administrator should ask for confirmation that the membership and / or subscription is canceled as of the specified date. A copy of the confirmation notice should be attached to the Worksheet.

CHANGE OF ADDRESS

The pastor / administrator should complete a change of address form at the local post office branch, indicating that all parish mail should be forwarded to the new parish. Shortly before the day of merger, the pastor / administrator will direct the parish staff to send out an announcement to all parties with which the parish routinely corresponds (i.e., parishioners, vendors, service providers, etc.) informing recipients of the proper mailing address and name for all correspondence with the new parish. Similarly, a notice regarding the change of an email address should be sent to all those in the parish's address book.

If the parish is closing, it should notify all vendors and the post office via appropriate forms to forward mail to the Archdiocesan Department of Property and Assets.

FINANCIAL SOFTWARE AND DATA

The parish and its accountant must make two complete system back-ups of each company file on the day of merger and send one to the Archdiocesan Parish Financial Services Office. Church management / parishioner database for the merging parishes should also be merged.

A final copy of the hard drive of the computer or network should be made and included with the financial records that will be archived. This copy of the hard drive and / or network should be made as of the last date any transactions are processed on the system or computer. Any computer being disposed of will need to be cleaned before disposal to make certain that all data is wiped clean from the hard drive.

All financial data backups should be saved for the same amount of time that printed records should be saved. It is important to note that the data backup should also include a copy of the program and / or operating system needed to access the data on the backup. The Archdiocesan Parish Financial Services Office should be contacted for assistance with automated records and technology needs. In the event the parish is merging, the records and systems needed to access those records should be moved to the merged parish.

PARISH INVENTORY (Non-Liturgical)**PARISH OFFICE**

The pastor / administrator should contact the Director of Property and Assets to discuss whether the inventory process should be outsourced. If not outsourced, the pastor / administrator shall make an inventory of all tangible office and computer equipment. The inventory should include serial numbers, condition, and approximate date of acquisition,

what inventory is needed by the new parish and shall assist the parish in divesting of any unnecessary equipment.

AUTOMOBILES

The pastor / administrator should inventory all automobiles owned by the parish, including those insured through the Archdiocesan Insurance Division. The description must include the vehicle identification number (VIN), mileage, and the names of any lien holders. (Worksheet 12 - Automobiles).

Generally, all vehicles should be disposed of if the parish is to be closed. In the case of a merger, the pastor of the newly merged parish should be consulted before disposing of any vehicle as the new parish may need it.

Parish owned trucks, utility vehicles, and trucks with snow plows should be offered first to other parishes and institutions in the Archdiocese before selling them to individuals. The vehicles will be listed in the parish inventory. All vehicle transactions with individuals will be at fair market value with appropriate tax reporting. Transactions between exempt entities must be at a reasonable value according to the financial circumstances of both the selling parish and the receiving parish.

If a parish owns a vehicle, and the parish is closing, as soon as the vehicle is no longer needed, the pastor should make arrangements to sell the vehicle. All details of the sale must be retained in a file. The pastor should sell the vehicle in a cash sale, and the money should be deposited into the parish operating account. The sale price of the vehicle must be reasonable and can be researched using one of many internet sites dealing with the sale of vehicles. The title to the vehicle must not be signed over to the purchaser until payment to the parish is made. It is suggested that the parish accept only cash or a bank check for the purchase. It is not recommended that a personal check or a money order be accepted.

Arrangements must be made for all vehicles to be disposed of before the final date of business, unless the vehicle is needed by the merged parish. The insurance office must be notified as soon as a vehicle is disposed of to remove it from the covered vehicle list.

MAINTENANCE EQUIPMENT

The pastor / administrator should inventory the parish owned maintenance equipment, i.e., lawn mowers, leaf blowers, snow plows, snow shovels, floor buffers, etc. (using Worksheet 10B – Maintenance Equipment Inventory). The maintenance equipment must remain on the parish property to maintain the site.

The pastor / administrator will retain one copy of the inventory sheet for the merged or closed parish and will distribute copies of the inventory sheets as follows:

1. Newly merged parish
2. Archdiocesan Property and Assets Office
3. Archdiocesan Parish Financial Services Office

FINANCIAL RECORDS / RECORDKEEPING

All financial records must be examined at the institution or parish. The record retention policy is located in the Archive section of this manual. All old records must be destroyed by shredding. The only financial records that need to be transported to the new parish or to the Archdiocese are the records required to be retained by Archdiocesan policy. In the case of a parish merger, the financial documents to be retained should be transported to the location of the merged parish. Sacramental records are covered in other sections of this manual. Educational records, including records of grade schools, Parish School of Religion records are also covered in other sections of this manual. The Office of Catholic Schools will give direction for educational records. The parish record custodian must contact the Archives Office or the Parish Financial Services Office if there are questions regarding record retention and destruction. All records to be saved and transported must be boxed, clearly labeled, and a listing prepared as to the contents of each box.

About forty-five (45) days prior to the last day of business, the bookkeeper or business manager must hold a meeting with a representative of the Parish Financial Services Office. At that meeting, the remaining records will be reviewed, and progress on all worksheets prepared as of the date the closing announcement will be reviewed. The meeting with the Archdiocesan Parish Financial Services Office representative will take place regardless if the parish is to be closed or merged.

It is expected, to the extent that funds are available, that all invoices will be paid as of the last date of business. Worksheet 2 must be completed on the final day of business listing any unpaid invoices for a parish that is merging or closing. If funds are not available to meet all final expenses, the parish should contact the Archdiocesan Parish Financial Services Office. The normal operating procedure for all parishes is that all parish liabilities will be paid in full and on time each month, including all obligations owed to the Archdiocese.

Information must also be compiled with names, mailing addresses, and tax identification numbers for those vendors that would need to be issued the Form 1099, and supplied to the Archdiocese Finance Office with the federal identification number of the parish or paying institution. The Archdiocese will issue the forms in the name of the parish at the appropriate time. If the Form 1099 is available for the year in which the last day of business occurs, then the parish should prepare and issue the 1099 forms, with a copy retained in the financial records that will be sent to the Archdiocese. Worksheets 15 & 15A should be completed when dealing with vendors and contractors needing 1099's.

All merged and closed parishes must file a final annual report as of the date the parish ceases all operations. All accounts must be reconciled and the annual report completed and signed by the outgoing pastor and preparer. The annual report is due as soon as practical but not more than sixty (60) days after the closing Mass has been celebrated. The report should be as accurate and complete as possible under the circumstances.

DONORS

In the case of a merger, it is important that contributors continue to receive envelopes on a consistent basis. All donations must be posted to donor records prior to closing and year-to-date contribution statements must be prepared and mailed, including contributions for the closing Mass. A hard copy of all donor contribution records for the year must be retained. Frequently, donors will need to obtain an additional copy of their donations for the year at tax time if they failed to keep them when they were sent. It is important that all parishes send proper acknowledgement for all donations made to the parish, including but not limited to offertory. Copies of those acknowledgements must also be retained. In the case of a parish closing, contribution records will be forwarded to the Archdiocese with the other financial records. In the event of a merger, the contribution records will be forwarded to the new parish.

DIRECT DEBIT / ACH TRANSACTIONS

In the case of a merger or a closure, automated transactions must be addressed. If the parish has a program that allows the parish to receive contributions electronically from parishioner bank accounts, the program must be terminated. If the ACH or direct debit is initiated weekly or monthly by the parish, a final date must be established when the last direct debit/ACH will take place. This date must be communicated to the parishioners affected. After the last debit, the banking information for the parishioners should be erased from all computers, computer systems, networks, and backup files. After the information to complete the transactions is no longer needed, it must not remain in the parish office in any form.

If the parish has vendors taking payments from the parish operating account, these automatic payments should be cancelled when it is announced that the parish is closing. Often it will take several cycles for the vendors to suspend automatic payments and send an invoice to the parish. If the parish has on-line access to the parish bank account (s), the on-line access should be terminated as soon as the announcement is made that the parish is closing. The bank should be notified that all inquiries and transactions will be made in person.

PAYROLL AND PERSONNEL (SEE SECTION 19)

The parish must make arrangements with Paychex to file all payroll forms and final tax returns for the final payroll. Paychex must be notified of the date of the final payroll, and the payroll company must be notified to send the W-2 forms when they are available. See Sections of the Manual regarding payroll, personnel, and benefits.

Appropriate notification must be provided to Archdiocesan Offices for employee benefits as employee changes occur. The Archdiocesan benefit offices must have a current address and contact information on file for each employee before the parish closes. This will enable the Human Resources Office and the Group Benefits Coordinator to be able to contact employees if necessary. Worksheet 9 is to be completed to provide correct employee information to the Archdiocese.

For specific employee matters, please contact the following individuals: Karen A. Kean, Director of Human Resources, and Leslie Anderson, Group Benefits Coordinator. These individuals may be able to visit the parish to speak with your employees in a group, and will handle specific questions as they arise. The needs will vary significantly by parish. If an employee is more comfortable meeting individually, that employee should be encouraged to call one of the persons listed to schedule an individual appointment.

MASS INTENTIONS

Mass Intentions must all be satisfied and all stipends paid to celebrants prior to the last day of business. If the parish is closing and there is remaining money in the Mass Intention fund, those funds should be forwarded to the Chancellor of the Archdiocese of Hartford for the purpose of having the Mass Intentions fulfilled by the retired priests of the Archdiocese of Hartford or by priests in the missions. If the parish is merging, the Mass intentions for the unsaid Masses should be given to the merged parish.

BINGO AND BINGO RECORDS

If the parish has Bingo, all invoices and accounts dealing with Bingo suppliers and vendors must be terminated and settled prior to closing. The final Bingo and sealed ticket reports should be prepared and filed with the Connecticut Department of Consumer Protection Charitable Games Unit prior to closing and all steps taken to properly notify the Department of Consumer Protection Charitable Games Unit of the cessation of operations and to dispose of sealed tickets. In the case of a merger, the merged parish may need to apply for a new Bingo license. If the merged parish decides to continue Bingo, please contact the State of Connecticut, Department of Consumer Protection Charitable Games Unit for more information. Bingo licenses are location specific and organization specific. If the name of the charitable organization changes or the location of the Bingo game changes, then a new license may be required. The merged parish should not conduct a Bingo session until the State of Connecticut issues a new license to the merged parish. All Bingo records must be maintained for at least the current year and three previous filing years. In the case of a closed parish, the records will be forwarded to the Archdiocese. In the case of a merged parish, the records should be transferred to the new parish.

Contact Information for this Section:

Archdiocese of Hartford Finance Office:

Parish Financial Services Office:

Patrick Egan
Dean Walford
(860) 541-6491

General Insurance Matters:

Brenda Rock
(860-541-6491)

Parish Billing Matters:

Dan Dunphy or Cheryl Roaix
(860-541-6491)

Department of Property and Assets:

Paul Connery, Director of Property and Assets
(860) 541-6491, Ext. 161

Human Resources:

Karen A. Kean, Director of Human Resources
(860) 541-6491 Ext. 7491

Employee Benefits:

Lesli Anderson, Group Benefits Coordinator
(860) 541-6491, Ext. 7458

Archdiocesan Attorney:

Karen Jansen Casey
Cooney, Scully and Dowling
Ten Columbus Boulevard
Hartford, CT 06106
kcasey@csd-law.com
(860) 527-1141

WORKSHEET #1 **BANK AND INVESTMENT ACCOUNTS**

BANK AND INVESTMENT ACCOUNT LISTING

Please attach copy of the latest bank statement and corresponding monthly reconciliation.

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Bank Name and Location	Account Name	Account Number	Account Type (Checking/Savings/ Money Market/CD/ Investment)	Account Balance	Signer(s) on Account	Restricted Account (Yes/No)	Reason for Restriction	Date of Account Closure
Name: _____ Address: _____ _____								
Name: _____ Address: _____ _____								
Name: _____ Address: _____ _____								
Name: _____ Address: _____ _____								

Please copy form if additional pages are needed

WORKSHEET #2 UNPAID BILLS LISTING

UNPAID BILLS

(Please attach each unpaid invoice and copy of the open item listing from the accounting system).

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Vendor Name and Address	Vendor Tax ID #	Account #	Invoice #	Amount	Date Invoice Due
Name: _____ Address: _____ _____					
Name: _____ Address: _____ _____					
Name: _____ Address: _____ _____					
Name: _____ Address: _____ _____					

Please copy form if additional pages are needed

WORKSHEET #3 **SERVICE CONTRACTS / AGREEMENTS**

SERVICE CONTRACTS / AGREEMENTS

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Service Contract Vendor	Account #	Equipment Under Contract / Agreement (Attach written agreement)	Termination Date of Contract/Agreement
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			

Please copy form if additional pages are needed

WORKSHEET #4
LEASE AND / OR RENTAL AGREEMENTS
WHERE PARISH IS LESSEE

LEASE AND / OR RENTAL AGREEMENTS

(Please attach a copy of the signed lease and / or rental agreement)

Prepared by: _____

Date: _____

Parish Name: _____

Parish Merger / Closure Date: _____

Company Leased From	Account #	Realty/Equipment/Vehicle Being Leased/Rented	Termination Date of Lease/Rental Agreement
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			

Please copy form if additional pages are needed

WORKSHEET #5
LEASE AND / OR RENTAL AGREEMENTS
WHERE PARISH IS LESSOR

LEASE AND / OR RENTAL AGREEMENTS

(Please attach a copy of the signed lease and / or rental agreement)

Prepared by: _____

Date: _____

Parish Name: _____

Parish Merger / Closure Date: _____

Organization Leased To	Property Being Leased/Rented	Frequency of Use (Daily, Weekly)	Amount Being Received	Termination Date of Lease/Rental Agreement
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				

Please copy form if additional pages are needed

WORKSHEET #6
ORGANIZATIONS USING PARISH PROPERTY

ORGANIZATIONS USING PARISH PROPERTY

Prepared by: _____

Date: _____

Parish Name: _____

Parish Merger / Closure Date: _____

Organization Name	Building / Location Being Used	Dates/Times of Use
Name: _____ Address: _____ Phone: _____		
Name: _____ Address: _____ Phone: _____		
Name: _____ Address: _____ Phone: _____		
Name: _____ Address: _____ Phone: _____		

Please copy form if additional pages are needed

WORKSHEET #7 **CHARGE ACCOUNTS**

CHARGE ACCOUNTS

(Please attach a copy of the latest statement)

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Store or Institution	Account #	Signer(s) on Account	Date Closed
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			

Please copy form if additional pages are needed

WORKSHEET #7A
CREDIT CARDS

CREDIT CARDS
(Please attach a copy of the latest statement)

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Financial Institution (Fleet/Capital One/Sovereign)	Account #	Signer(s) on Account	Date Closed
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			
Name: _____ Address: _____ Phone: _____			

Please copy form if additional pages are needed

WORKSHEET #7B **MEMBERSHIPS / SUBSCRIPTIONS**

MEMBERSHIPS / SUBSCRIPTIONS

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Company Name	Membership/Subscription ID or Account #	Date Cancelled
Name: _____ Address: _____ Phone: _____		
Name: _____ Address: _____ Phone: _____		
Name: _____ Address: _____ Phone: _____		
Name: _____ Address: _____ Phone: _____		

Please copy form if additional pages are needed

WORKSHEET #8
RESTRICTED ACCOUNTS / GIFTS / ASSETS (Tangible or Intangible)

RESTRICTED ACCOUNTS / GIFTS / ASSETS

Prepared by: _____

Please attach copy of document imposing restriction

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Donor	Institution Where Funds Are Held	Account Name	Account Number	Signer(s) on Account	Reason for Restriction
Name: _____ Address: _____ _____	Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____	Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____	Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____	Name: _____ Address: _____ _____				

Please copy form if additional pages are needed

WORKSHEET #9 EMPLOYEE LISTING

EMPLOYEE LISTING *Please list all lay employees*

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Parish paying into the CT Unemployment Insurance Fund? (yes or no) _____

Employee	SSN (last 4 digits only)	Last Day Worked	Date of Hire	W-2 or Unreported	Medical Plan FAM/IND	Dental Plan FAM/IND	Pension Plan YES/NO	Hours per week	Pay Period (Weekly/bi-weekly/monthly)	Rate	Current Annual Salary	Unpaid Vacation Time (in days)	Severance Amount
Name: _____ Address: _____ _____ Phone: _____													
Name: _____ Address: _____ _____ Phone: _____													
Name: _____ Address: _____ _____ Phone: _____													

Please copy form if additional pages are needed

**WORKSHEET #10A
PARISH OFFICE INVENTORY**

PARISH OFFICE INVENTORY

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Item (Furniture, office equipment, etc.)	Control #	Quantity	Description	Condition (Excellent, Good, Fair, Poor)	Make	Model	Serial #	Estimated Value	Comments

Please copy form if additional pages are needed

WORKSHEET #10B
MAINTENANCE EQUIPMENT INVENTORY

MAINTENANCE EQUIPMENT INVENTORY

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Item	Control #	Quantity	Description	Condition (Excellent, Good, Fair, Poor)	Estimated Value	Comments

Please copy form if additional pages are needed

WORKSHEET #11
PARISH SACRED OBJECTS INVENTORY/APPRAISAL/SALES REPORT

Parish Name: _____
Parish Merger / Closure Date: _____

Prepared by: _____
Inventory Date: _____

Item/Description	Control #	Quantity	Condition (Excellent, Good, Fair, Poor)	Saleable? (Yes/No)	Estimated Fair Market Value	Proposed List Price	Selling Price	Date Sold	Sold to ?	Comments

Please copy form if additional pages are needed

WORKSHEET #12
AUTOMOBILES

AUTOMOBILES

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Automobile Make	Model	Year	VIN	Mileage	Condition	Lienholder	Terms

Please copy form if additional pages are needed

WORKSHEET #13
CHECKLIST OF FINANCIAL RECORDS TO BE PRESERVED
*(Provided for example purposes only for types of financial records
but not limited to the items listed.)*

Parish Name: _____

Please box financial records by fiscal year. Please ensure that the fiscal year is clearly marked on all boxes.

THE FOLLOWING APPLIES TO ALL PARISH AND ASSOCIATED ORGANIZATION ACCOUNTS
(Examples: Holy Name Society, Parent / Teacher Group, School Accounts)

General:

Bank Statements
Cancelled Checks
Deposit Slips
Deposit Summary Forms
Reimbursement Request Forms
Monthly Financial Reports to Parish
Vendor Contracts
Bills / Invoices / Receipts
Copies of Lease or Rental Agreements
Parish Donations Records
Donation Acknowledgement Letters Sent To Donors
Fundraising Records

Payroll:

Employee Personnel Files
W-2 Forms
1099 Miscellaneous Forms (For Independent Contractors, Visiting Priests, Bingo / Raffle Winners)
Employee Time Sheets
Employment Contracts
Employee Federal W-4 Forms
Employee I-9 Forms
Job Descriptions
Payroll Reports from External Payroll Company (if applicable)
Manual Payroll Forms (if applicable)
941 Quarterly Reports
Workers Comp / Unemployment Reports

Software Application Data:

Full back up of accounting software data
Full back up of census / donation data

WORKSHEET #14 **CONTACT PERSON LISTING**

CONTACT PERSON LISTING

Please provide the following information for the person(s) who prepared these forms and identify sexton and maintenance personnel)

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Name and Address	Area of Responsibility	Phone	Fax	Email
Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____				
Name: _____ Address: _____ _____				

Please copy form if additional pages are needed

WORKSHEET #15
VENDOR LISTING FOR 1099 MISCELLANEOUS FORM(S)

VENDOR LISTING FOR 1099 MISCELLANEOUS FORM(S)

Please ensure you note the vendor's tax id#)

(Please attach a detailed list of the checks issued to each vendor – worksheet provided)

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

Vendor Name and Address	Vendor Tax ID #	Total Amount Paid (from Jan. 1 to final payment)
Name: _____ Address: _____ _____		
Name: _____ Address: _____ _____		
Name: _____ Address: _____ _____		
Name: _____ Address: _____ _____		
Name: _____ Address: _____ _____		

Please copy form if additional pages are needed

WORKSHEET #15A
VENDOR CHECK LISTING FOR 1099 MISCELLANEOUS FORM(S)

VENDOR CHECK LISTING
FOR 1099 MISCELLANEOUS FORM(S)
(Please list each check separately)

Prepared by: _____

Parish Name: _____

Date: _____

Parish Merger / Closure Date: _____

	Vendor Name	Check Date	Check #	Amount of Check	Total for Vendor
1	_____	_____	_____	_____	
2		_____	_____	_____	
3		_____	_____	_____	
4		_____	_____	_____	
5		_____	_____	_____	
6		_____	_____	_____	
7		_____	_____	_____	
8		_____	_____	_____	
9		_____	_____	_____	
10		_____	_____	_____	
11		_____	_____	_____	
12		_____	_____	_____	
13		_____	_____	_____	
14		_____	_____	_____	
15		_____	_____	_____	_____
1	_____	_____	_____	_____	
2		_____	_____	_____	
3		_____	_____	_____	
4		_____	_____	_____	
5		_____	_____	_____	
6		_____	_____	_____	
7		_____	_____	_____	
8		_____	_____	_____	
9		_____	_____	_____	
10		_____	_____	_____	
11		_____	_____	_____	
12		_____	_____	_____	
13		_____	_____	_____	
14		_____	_____	_____	
15		_____	_____	_____	_____

Please copy form if additional pages are needed

Parish Cemeteries

Guidelines for transfer

The relevant canons are chiefly cc. 1205-1213, 1240-1243, and also cc.50, 51, 120, 121,122, 123, and 127.

Critical issues for the transfer of a parish cemetery include:

1. The condition and accuracy of cemetery records;
2. Back up, archiving, and storage of cemetery records;
3. The condition of the cemetery property and any maintenance needs;
4. Existing contracts for cemetery care and maintenance;
5. The status (funding) of the perpetual care fund;
6. Possible funding the perpetual care reserve from the sale of the parish's property;
7. The lot split of the property if the parish property will be sold separate from the cemetery;
8. Determining who will care for the cemetery in the future.

Parish cemeteries (including their assets, liabilities, and records) are to be transferred as follows:

- Extinctive Union (merger): to the new parish;
- Extinctive Union (amalgamation): to the new parish;
- Total Division: to one of the parishes receiving parishioners, as determined by decree;
- Suppression: to a new parish, as determined by decree.

The cemetery may not be incorporated as a separate entity or otherwise alienated from ecclesiastical care.

The decree modifying the parish will account for the care of the cemetery and the transfer of its assets, liabilities, and records.

The pastor / administrator will assemble all records for the cemetery, dating back to its inception. These records will be inventoried and given to the pastor / administrator of the new parish. The records will include:

1. Cemetery plans, maps, surveys, grave location listings;
2. Certificate of right of burial (deed) books;
3. Copy of original deed for the property when it was purchased;
4. Vital Statistics records;
5. Insurance certificates, titles and insurance cards for all equipment and vehicles;
6. Exact inventory of equipment and maintenance logs;
7. Contract and contractor files;
8. Correspondence files;
9. Employee records;
10. Financial records;
11. Interment registers;
12. Investment records;
13. Lot cards and plot record cards;
14. Memorial and monument applications;
15. Payroll records;
16. Rules and regulations;
17. Sales records;
18. Unused cemetery records;

The parish accountant, bookkeeper, or business manager will reconcile the operating and perpetual care fund accounts.

Title to the cemetery and the burial equipment will be transferred to the newly merged parish, or to one of the parishes receiving parishioners, as determined by decree. Consideration must be given to determining the adequacy of the perpetual care fund and the value of the remaining unsold inventory.

The new parish must not change the name of the cemetery.

Contact: Chancellor

Archdiocese of Hartford

Fr. Ryan Lerner: Fr.Lerner@AOHCT.org

(860) 541- 6491 ext. 154

Paul Connery

Director of Property & Assets

paul.connery@aohct.org

(860) 541-6491 Ext. 161

For assistance with other specific cemetery related questions, contact:

Catholic Cemeteries Association of the Archdiocese of Hartford, Inc.

Executive Director: John Pinone

Phone: (203) 239-2557

Email: jpinone@ccacem.org

Archives and Records

If a parish closes or changes status through forming a parish, records issues become extremely important. Records literally tell the story of the parish and embody and preserve its unique heritage and contributions to the Life of the Church in the Archdiocese of Hartford.

Records contain information that has ongoing value to the parish. The loss of such records would have serious impact on the present and future operation of the parish. They preserve important information regarding the finances and property of the parish. They can have (as in the case of sacramental records) continuing impact on people's lives. Not all records need to be permanently maintained.

Archival records include those records which have permanent and enduring status, based on historic, legal, financial and administrative values. These are records that are either created by the parish or contain information about the parish.

Records come in different formats. They can be blueprints, specifications, legal documents, official correspondence, decrees, insurance policies, organizational minutes, bulletins, newsletters, photographs, financial ledgers and journals, videos, cassettes, homilies, reports published and unpublished, parish and organizational histories.

To help you, the following is a Records Retention Schedule for Parishes and Schools:

Records Retention Schedule

Record Group	Type of Record	Time	Medium	Retained	Disposal
	<p>Note on email: The fact that a record is Electronic or Email should not affect its retention. The schedule to be followed should be determined by the content of the record. For example, an Email about finance matters would follow the schedule for financial records. An Email about Tribunal matters would follow the schedule for Tribunal records. A personal email or spam would not be a record at all and could be disposed of, etc.</p> <p>Emails may be filed in Electronic folders or printed and filed as paper documents based on their content.</p>				
	Administrative Records All Departments (correspondence, memoranda, rules and regulations, etc.)				
	a. Records originating in the organization that document policy, procedure, rules or regulations	Permanent	Paper/Electronic	On site	
	b. Records that document routine activities	2 years	Paper/Electronic	On site	Shred/Electronic
	Abstracts, deeds (property)	Permanent	Paper	On site	
	Annual Reports to (Status Animarum)	Permanent	Paper	On site	
	Articles of Incorporation (of the church corp., parish)	Permanent	Paper	On site	
	Bequest and estate papers	Permanent	Paper	On site	
	Bishop's Decrees	Permanent	Paper/Electronic	On site	
	Communications from the Bishop regarding the parish	Permanent	Paper/Electronic	On site	
	Bylaws	Until dissolved	Paper	On site	
	Correspondence, legal	Permanent	Paper/Electronic	On site	
	Correspondence, official (paper and email regarding diocesan/parish policies,	Permanent	Paper/Electronic	On site	
	Correspondence, routine	Biennial review		On site	Shred/Electronic
	Donor lists	Permanent	Paper/Electronic	On site	
	Finance Committee Minutes	Permanent	Paper/Electronic	On site	
	Insurance policies	Permanent	Paper	On site	
	Inventories of property and equipment	Permanent	Paper/Electronic	On site	

	Leases	Expiration + 7 years	Paper	On site	Shred/Electronic
	Office files, general	Biennial review	Paper/Electronic	On site	Shred/Electronic
	Policy Statements	Permanent	Paper/Electronic	On site	
	Subject files (memos, rules, schedules, etc.)	Annual review	Paper/Electronic	On site	
	Wills, testaments, codicils	Permanent	Paper/Electronic	On Site	
Archives					
	Parish History Files	Permanent	Paper	On site	
	Photo Files (priests, parishes, institutions, general)	Permanent	Paper/Electronic	On site	
	Baptism Record Index Files	Permanent	Paper/Elec/micro	On site	
	Historical material (clippings, photos, booklets, etc. related to the parish)		Paper/Electronic	On site	
	<i>Publications -</i>				
	Parish histories	Permanent	Paper/Electronic	On site	
	Parish anniversary books	Permanent	Paper/Electronic	On site	
	Newsletters (parish)	Permanent	Paper/Electronic	On site	
	Parish directories	Permanent	Paper/Electronic	On site	
	Parish bulletins	Permanent	Paper/Electronic	On site	
Catholic Schools Office					
General					
	Standardized Test Results	10 years	Paper	On site/ school	
	Curriculum Standards	Until superseded	Paper/Electronic	On site	
	Federal Program Allotments	5 years	Paper/Electronic	On site	
	NCEA Reports	Permanent	Paper	On site	
AHERA					
	School Management Plans	Permanent	Paper	On site/ school	
	Periodic Surveillance Reports	Permanent	Paper	On site/ school	
	Abatement documents and manifests	Permanent	Paper	On site/ school	
	School Annual Report for Continued Accreditation	Permanent	Paper	On site/ school	
	School Self-Study Document	Permanent	Paper	On site/ school	
	VT Consensus Report/Notification of Status	Permanent	Paper	On site/ school	
	School Required Actions	Permanent	Paper	On site/ school	
	Interim Reports	Permanent	Paper	On site/ school	
	Guide to Quality and Effectiveness Manual	Until superseded + 5 years	Paper/Electronic	On site/ school	
	TCCED Health Manual	Until superseded	Paper/Electronic	On site/ school	
	Individual Deficiency Removal Plans/Verification	Termination + 5 years	Paper	On site/ school	
Education Personnel					
	Certificates and Licenses	Termination + 5 years	Paper	On site/ school	
	Employee Service Record including wage & salary	Permanent	Paper/Electronic	On site/ school	
	Official Teacher Service Record (included above)	Permanent	Paper/Electronic	On site/ school	
	Employment Applications (Potential Hires)	2 years from receipt	Paper/Electronic	On site/ school	

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	Official Transcripts	Termination + 5 years	Paper	On site/ school	
	Employment Contracts	Last effective date+4 yrs	Paper	On site/school	
	Grievance Records (not EEOC)		Paper	On site/school	
	Training and Educational Attainment Records	Termination + 5 years	Paper/Electronic	On site/school	
Communications					
	News Media Clippings	Permanent	Paper/Electronic	On site	
	Employee Performance Reviews	3 years	Paper	On site	
	Pastoral Center News	Permanent	Electronic	On site	
	Clergy Newsletter	Permanent	Electronic	On site	
Business Office					
Risk Management					
	Incident Reports (accidents/injury)	7 years	Paper/Electronic	On site	
	Employee medical complaints	7 years	Paper/Electronic	On site	
	Employee medical records	7 years	Paper/Electronic	On site	
	Environmental test records/reports	Permanent	Paper/Electronic	On site	
	Hazardous exposure records	Permanent	Paper/Electronic	On site	
	Toxic Substance exposure reports	Permanent	Paper/Electronic	On site	
	Workers Compensation Records	12 years	Paper/Electronic	On site	
Payroll					
	Permanent earnings and records	Termination + 7 years	Paper/Electronic	On site	
	Attendance records	Termination + 7 years	Paper/Electronic	On site	
	Employee contracts	Termination + 7 years	Paper/Electronic	On site	
	Employee deduction authorization	Termination + 7 years	Paper/Electronic	On site	
	Employee salary schedules	Termination + 7 years	Paper/Electronic	On site	
	Labor contracts	Termination + 7 years	Paper/Electronic	On site	
	W-2 years Forms	Filing + 7 years	Paper/Electronic	On site	
	W-4 years Forms	Filing + 7 years	Paper/Electronic	On site	
	Time Cards	Filing + 3 years	Paper/Electronic	On site	
	Time Records	Filing + 3 years	Paper/Electronic	On site	
Banking					
	Bank deposits	7 years	Paper/Electronic	On site	
	Bank statements	7 years	Paper/Electronic	On site	
	Cancelled checks	7 years	Paper/Electronic	On site	
	Check registers/stubs	7 years	Paper/Electronic	On site	
General					
	Audit reports	Permanent	Paper/Electronic	On site	
	Balance sheets, annual	Permanent	Paper/Electronic	On site	
	Balance sheets, monthly/quarterly	1 year	Paper/Electronic	On site	
	Budgets, approved, revised	7 years	Paper/Electronic	On site	
	Financial Reports, annual	Permanent	Paper/Electronic	On site	
	Financial reports, monthly	1 year	Paper/Electronic	On site	
	Financial statements	Permanent	Paper/Electronic	On site	
Investment/Ins.					
	Certificates of Deposit, canceled	Redemption + 3 years	Paper/Electronic	On site	
	Insurance policies, active	Permanent	Paper/Electronic	On site	
	Insurance policies, canceled	Permanent	Paper/Electronic	On site	
	Mortgage records	Permanent	Paper/Electronic	On site	
	Letters of credit	7 years	Paper/Electronic	On site	
	Securities sales	7 years	Paper/Electronic	On site	
	Stock investment	Sale + 7 years	Paper/Electronic	On site	

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Accounting					
	Accounts payable, invoices	7 years	Paper/Electronic	On site	
	Accounts payable, ledgers	7 years	Paper/Electronic	On site	
	Accounts receivable, ledgers	7 years	Paper/Electronic	On site	
	Credit card statements/charge slips	7 years	Paper/Electronic	On site	
	Invoices and bills paid, major building construction	Permanent	Paper/Electronic	On site	
	Invoices and bills paid, general accounts	7 years	Paper/Electronic	On site	
	Cash books	7 years	Paper/Electronic	On site	
	Cash journals	7 years	Paper/Electronic	On site	
	Cash journals, receipts on offerings and pledges	7 years	Paper/Electronic	On site	
	Receipts	7 years	Paper/Electronic	On site	
	Mortgage payments	7 years	Paper/Electronic	On site	
	Chart of accounts	7 years	Paper/Electronic	On site	
Other Records					
	General ledger, annual	Permanent	Paper/Electronic	On site	
	Journals, general and specific funds	Permanent	Paper/Electronic	On site	
	Journal entry sheets	7 years	Paper/Electronic	On site	
	Ledgers, subsidiary	7 years	Paper/Electronic	On site	
	Payroll journals	7 years	Paper/Electronic	On site	
	Payroll registers (<i>summary schedule of earnings, deductions & accrued leave</i>)	7 years	Paper/Electronic	On site	
	Pension records	Permanent	Paper/Electronic	On site	
	Pledge registers/ledgers	7 years	Paper/Electronic	On site	
	Permanently restricted gift documents	Permanent	Paper/Electronic	On site	
	Temporarily restricted gift documents	7 years after restrictions	Paper/Electronic	On site	
Tax Records					
	Employment taxes (<i>contributions and payments including withholding and FICA</i>)	File + 7 years	Paper/Electronic	On site	
	W-2 years Forms	File + 7 years	Paper/Electronic	On site	
	W-4 years Forms	File + 7 years	Paper/Electronic	On site	
	IRS exemption determination letters (<i>Other than OCD listed organizations</i>)	File + 7 years	Paper/Electronic	On site	
	Form 990	Permanent	Paper/Electronic	On site	
	IRS exemption determination letters: <i>income, excise, property, sales, use, etc.</i>)	Permanent	Paper/Electronic	On site	
Property Records					
	Architectural records, blueprints, building designs, specifications	Permanent	Paper/Electronic	On site	
	Architectural drawings	Permanent	Paper/Electronic	On site	
	Deeds files	Permanent	Paper/Electronic	On site	
	Mortgage documents	Permanent	Paper/Electronic	On site	
	Property appraisals	Permanent	Paper/Electronic	On site	
	Real estate surveys/plots, plans	Permanent	Paper/Electronic	On site	
	Title search papers and certificates	Permanent	Paper/Electronic	On site	
Cemetery Records					
	Account cards (<i>record of lot ownership & payments</i>)	Permanent	Paper/Electronic	On site	
	Annual Report	Permanent	Paper/Electronic	On site	
	Bank statements	7 years	Paper/Electronic	On site	
	Board minutes	Permanent	Paper/Electronic	On site	
	Burial cards (<i>record of interred's name, date of burial, etc.</i>)	Permanent	Paper/Electronic	On site	
	Burial records (<i>record of interred's name, date of burial, etc.</i>)	Permanent	Paper/Electronic	On site	
	Contracts documenting lot ownership	Permanent	Paper/Electronic	On site	
	Correspondence	BANR	Paper/Electronic	On site	

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	General ledger	Permanent	Paper/Electronic	On site	
	Lot maps	Permanent	Paper/Electronic	On site	
Human Resources					
Admin. Records					
	Employee Policy Manual	Permanent	Paper/Electronic	On site	
	Job Descriptions	Permanent	Paper/Electronic	On site	
	Organizational Chart	Permanent	Paper/Electronic	On site	
	1-9 years Audit	Permanent	Electronic	On site	
Personnel Records					
	Employee Application	Termination + 4 years	Paper	On site	
	Resume	Termination + 4 years	Paper	On site	
	Employee contracts/offer letters	Termination + 4 years	Paper	On site	
	Salary Information	Termination + 4 years	Paper/Electronic	On site	
	Attendance Records (<i>Jury, PTO, STD, LTD, FMLA, Bereavement</i>)	Termination + 4 years	Paper/Electronic	On site	
	Eligibility Verification Form 1-9 years	Termination + 4 years	Paper	On site	
	Performance Reviews	Termination + 4 years	Paper	On site	
	Write Ups	Termination + 4 years	Paper	On site	
	Promotions/Transfers	Termination + 4 years	Paper	On site	
Benefit Records					
	Open Enrollment	Termination + 4 years	Paper	On site	
	New Hire	Termination + 4 years	Paper	On site	
	Life Event	Termination + 4 years	Paper	On site	
	Cont. of Benefits	Termination + 4 years	Paper	On site	
	Term of Benefits	Termination + 4 years	Paper	On site	
	Disability Records STD/LTD	Termination + 4 years	Paper/Electronic	On site	
	FLMA	Termination + 4 years	Paper	On site	
	403b Retirement Plan	Termination + 4 years	Paper	On site	
	Life Insurance Policies	Termination + 4 years	Electronic	On site	
	Benefit Plan Description	Rollout + 4 years	Electronic	On site	
	Benefit Plan Annual Reports	6 years	Electronic	On site	
	Personnel File	Termination + 4 years	Paper	On site	
	Rejected Applications/Resumes	1 year	Paper	On site	
Pastoral Planning					
	<i>Ad Limina</i> Reports (Quinquennial Report)	Permanent	Paper	On site 10 yrs.	
	Official Catholic Directory Report	Permanent	Paper	On site 10 yrs	
	October Mass Counts	Permanent	Paper	On site 10 yrs	
	Census Records (parish)	Permanent	Paper/Electronic	On site 10 yrs	
Safe Environment					
	Application	Termination + 7 years	Paper	On site	
	Screening Form	Termination + 7 years	Paper/Electronic	On site	
	Interviews	Termination + 7 years	Paper	On site	
	References	Termination + 7 years	Paper/Electronic	On site	
	Criminal Background Check	Termination + 7 years	Paper/Electronic	On site	
	Training Records	Termination + 7 years	Paper/Electronic	On site	
	Policy Acknowledgement	Termination + 7 years	Paper/Electronic	On site	
	Computer/Internet Policy	Termination + 7 years	Paper/Electronic	On site	
Newspaper					
	Newspaper back issues	Permanent	Paper/Electronic	On site	
	Other newspaper back issues	Permanent	Paper	On site	
	Photos	Permanent	Paper/Electronic	On site 10 yrs	Archives
	Photos	Permanent	Paper/Electronic	On site 10 yrs	Archives

	Subscription Database	Permanent	Paper/Electronic	On site	
	Subscription Database	Permanent	Paper/Electronic	On site	
	Website	Permanent	Electronic	On site	
	Freelancer Information	Permanent	Electronic	On site	
	Advertising Contracts	Permanent	Paper/Electronic	On site	
	General Information Files	Permanent	Paper	On site	
Youth Ministry					
	Waiver of liability forms	7 years	Paper	On site	Shred
	Medical release forms	7 years	Paper	On site	Shred
	Code of Conduct forms	7 years	Paper	On site	Shred
	Incident report forms	7 years after resolution	Paper	On site	Shred

Additional Notes:

As time approaches for a closing or a building transition, the question of records transfer becomes critical. It is important to check the building thoroughly because valuable records, such as blueprints can be and often are stored in out of the way places such as closets, basements, attics, crawlspaces. Please look inside any stored boxes because many times labeling is very inadequate on stored boxes or may even be misleading since people recycle good boxes!! Please contact the Archives staff for any needed assistance. If you have a question regarding whether items should be sent to the Archives, pack and transfer them anyway. Your time is very valuable so please ask for assistance.

Items should be packed in sturdy boxes. Labeling should be placed on the side of the box identifying the contents of the box and if it is part of a series, e.g. Saint Anthony, Ansonia, Historic Parish Correspondence, 1895 to 1943 (box 1 of 2). Ideally boxes should be taped. Three lists detailing the contents of the box should be made. One will be given to the Archives, one to the delivery person and one kept by the parish for reference.

If there are questions regarding records, what should be kept, or getting packing material, please contact the Archives staff. If one questions whether something should be forwarded to the Archives, please pack it and send it to us. We will be able to sort and arrange at the Archives. We want to respect your time and understand that you have many tasks to complete.

Persons with Disabilities

On the five (5) pages that follow, you will find a checklist that will allow you to indicate any ministry services (sacramental preparation, etc.) or ministry opportunities which currently exist for members of your parish who have disabilities. Please take time to complete the checklist and make sure that it is submitted with all other relevant parish information to the parishes where your current parishioners might choose to become affiliated. The information you provide here will be important to them as they move forward.

If you have any questions or concerns about this form, please contact:

Office for People with Disabilities, (currently vacant)
Archdiocesan Center at St. Thomas Seminary
467 Bloomfield Avenue
(860) 242-5573

Catholic Deaf Apostolate
Deacon Dennis Ferguson
(860) 233-5131

Ministries for Persons with Disabilities in our Parish

Parish Information

Parish Name: _____

Pastor's Name: _____

Person completing this form: _____

Phone: ____ (____) _____ Email: _____ @ _____

Please provide information on ministries your parish currently offers for persons with disabilities. We want to assure that these ministries will continue. Review and answer the following to provide the new pastor with any needed information.

Individual Sacramental Records

- ☐ Provide the new pastor with any sacramental records of persons with disabilities.
- ☐ Provide the names, contact information, and which Sacrament they are preparing for.
- ☐ Explain any special liturgical accommodations.

Special Religious Education Programs (SRE)

Is an SRE program provided at your parish? ☐ Yes ☐ No

If no, what parish provides the program? _____

Who is the program for? Children _____

What types of disabilities?

Deaf / Hearing Impaired	Blind / Visually disabled
Autism	Intellectual disabilities (MR / DD)
Multiple challenges	Mental Illness
Physical challenges (i.e. use of a wheelchair, cane, has cerebral palsy, multiple sclerosis, etc.) Other (please specify):	

Parish Advocacy Program (The Parish Advocate is a person who serves his / her parish community by speaking for and representing persons with disabilities regarding parish concerns. Their role is to consider their parish's needs and work with the pastor to include all persons into the life of the parish community.)

Does your parish have an advocacy program? Yes ☐ No ☐

If yes, please provide contact name and phone number and / or email address:

Name: _____

Phone: _(_____)_____

Email address: _____@_____

Other programs and ministries

Do you offer any other programs or ministries in which persons with disabilities participate? Please check below if any persons with disabilities participate in any of the following programs and/or ministry opportunities.

	Deaf / hearing impaired	Blind / Visually disabled	Intellectual disabilities (MR/DD)	Autism	Mental Illness	Physical Disabilities	Multiple Challenges	Other
Special Worship Services								
Faith & Light								
Eucharistic Ministers								
Servers								
Bible Studies								
Socials								
RCIA								
Sacramental Preparation								
Readers / Lectors								
Greeters								
Parish Council								
Catechist								
Parish Staff								
Youth Group								
Other (please specify)								

Accessibility Information

Please check yes, no or not sure to the following questions regarding the current level of accessibility of your buildings and liturgies:

	Yes	No	Not sure
Do you provide a sign language interpreter?			
Are homilies and other spoken material provided in an alternative form?			
Are assistive listening devices available?			
Are printed materials available in alternative forms? (large print, tape, Braille)			
Are there clearly marked parking spaces for people with disabilities?			
Is at least one entry way to each facility accessible to people with mobility challenges (parishioners and guests who use wheelchairs, canes, crutches, walkers or are unsteady)?			
If yes, which do you use in the entryways?			
Ramp			
Lift Device			
Elevator			
Steps have continuous hand rails			
Doors open easily or automatically			
Other:			
Are the following areas accessible to people with mobility challenges?			
Sanctuary			
Confessionals			

Choir Area			
Parish Hall			
Rectory			
Restrooms			
Water Fountains			
Telephones			
Other:			

Resources:

Office for People with Disabilities, (currently vacant)
 The Archdiocesan Center at St. Thomas Seminary
 467 Bloomfield Avenue
 (860) 242-5573

Catholic Deaf Community
 Deacon Dennis Ferguson
 (860) 233-5131

Celebration of the Sacraments

Introduction:

This section is provided to help organize communication between parishes. There is no expectation that new entities are to provide services in a manner similar to that of the previous parish.

Celebration of the Sacraments

“The seven sacraments touch all the stages and all the important moments of Christian life: they give birth and increase, healing and mission to the Christian’s life of faith. There is thus a certain resemblance between the stages of natural life and the stages of the spiritual life.” (Catechism of the Catholic Church, #1210).

Goal: To communicate to the new or receiving parish the ways in which the *sacraments are* celebrated in the present parish in order to facilitate a good transition for those in preparation for the reception of a sacrament.

General Guidelines

Once the closing or merging of the parish is determined, communicate with those preparing for the reception of a sacrament (or the parents of children) so that they are aware of how, where and when the sacrament will be celebrated. Reassure them of the parish’s concern for their reception of the sacrament.

Communicate with the new or receiving parish to determine when the sacraments are celebrated in that parish.

If preparation has been or will be completed and time permits, arrange for the celebration of the sacrament at the present parish.

Information to be communicated for those who will celebrate the sacrament in the new or receiving parish

A description of how and when the sacrament has been celebrated in the present parish.

A description of how preparation for the sacrament has been provided for in the present parish; this would include the names of persons providing the formation, materials and resources used, where each person (or group) is in their preparation process.

The names and contact information for the person(s) preparing for the sacrament.

Please provide a completed information sheet about each of the sacraments to the new or receiving parish

BAPTISM

1. What is the present schedule being followed for Baptism Preparation Classes?
2. Who is conducting the Baptismal Preparation Classes? (name, contact information)
3. What is the parish policy regarding parental preparation for this sacrament?
4. Are there other criteria to be met before this sacrament is conferred (parents' marital status, sponsor qualifications, etc.)
5. Describe the Baptism Preparation Program
6. What materials or resources are used in the sacramental preparation program?
7. List the names, contact information and level of preparation of each candidate for the Sacrament of Baptism.
8. When and how frequently is the sacrament celebrated? Does the parish provide a sacramental remembrance? (e.g., a cross-embroidered white cloth)

PENANCE

1. When are children prepared for the reception of the Sacrament of Penance?
2. Who is responsible for this preparation? (name, contact information)
3. Is there a parent preparation program? Is it done in conjunction with the parent program for First Eucharist? Describe this. (materials used, person responsible, etc.)
4. What are the criteria for admission to preparation for this sacrament? (years of religious education, age of candidate, registration in the parish, etc.)
5. Describe the program for the preparation of children for the Sacrament of Penance.
6. Are there any distinctions between day school and PSR preparations?
7. What materials or resources are used in the program?
8. List the names, contact information and level of preparation of each child in his / her preparation for the Sacrament of Penance?
9. When and how is First Penance celebrated? Does the parish provide a sacramental remembrance?

EUCHARIST

1. How is the reception of First Eucharist scheduled in the parish?
2. Who is responsible for the preparation of children for First Eucharist? (name, contact information, etc.)
3. Is there a parent preparation program? Describe this. (person responsible, materials used, etc.)
4. What are the criteria for admission to preparation for this sacrament? (years of religious education, age of candidate, registration in parish, parent participation in preparation, etc.)
5. Describe the program being used for preparation for First Eucharist.
6. Are there any distinctions between day school and PSR preparations?
7. What materials or resources are used in the program? Is there a retreat day?
8. List the names, contact information and where each child is in their preparation for First Eucharist.
9. When and how is First Eucharist celebrated? Does the parish provide a sacramental remembrance?

CONFIRMATION

1. What is the present schedule being followed for Confirmation Preparation Classes?
2. Who is responsible for the Confirmation preparation program? (name, contact information)
3. Is there a parent preparation program? Describe this. (materials used, person responsible, etc.) What is required of sponsors?
4. What are the criteria for admission to preparation for this sacrament? (years of religious education, age of candidate, registration in the parish, etc.)
5. What is the parish policy regarding adult Confirmation? How are adults prepared for the sacrament?
6. Describe the Confirmation preparation program. Are there service requirements?
7. What materials or resources are used in the program?
8. List the names, contact information and where each person is in their preparation for the Sacrament of Confirmation. (Indicate adult candidates on a separate sheet.)
9. When will the sacrament be celebrated / or when was the sacrament last celebrated? Does the parish provide a sacramental remembrance?

MARRIAGE

1. If there are weddings scheduled after the date of the parish closure, see the section in this manual entitled, *Rescheduling Marriages*.
2. If there are couples being prepared for marriage (even if no wedding date has been scheduled,) please provide the contact information for each couple.
3. Who is responsible for helping the couple in their preparation for marriage? Who is in possession of the marriage preparation file and the couple's Prepare / Enrich information? Does the parish host a Pre-Cana Day or recommend a location for this?
4. Is there a Couples Ministry in the parish for marriage preparation? If so, please provide contact information for the couples trained and active as Couples Ministers.
5. In addition to the Pastoral Guidelines for the Sacrament of Matrimony, does the parish have particular policies pertaining to the selection of prayer texts and ritual options, the selection of Scripture, liturgical music, and the option for the choice of a guest presider?
6. Has the parish had an ongoing marriage enrichment program? Are married couples using the Prepare-Enrich program in this ongoing program? Who is responsible for this program? Please provide names and contact information.
7. Annulments: Please list all the applications for Declaration of Nullity currently submitted and pending in the Archdiocesan Tribunal? Please list the name, the identification number and the name of the advocate assigned to each of these cases.
8. Are there any annulment cases in the preparation phase not yet submitted to the Tribunal still in parish possession? Who has possession for those files? Who is responsible for this process in the parish? If other than the priest or deacon, please provide contact information.
9. Is there a Separated / Divorced Ministry? Who is facilitator of this ministry? What resources are being used?

ANointing OF THE SICK
PASTORAL CARE OF THE SICK AND HOMEBOUND

1. What is the current schedule for the celebration of the Sacrament of the Anointing of the Sick (large group)?

2. Do the people of the parish take advantage of this opportunity? Does the parish provide transportation assistance?

3. Is there any ministry in the parish which connects those who are homebound with the broader parish community? (receive the parish bulletin, post names of sick in bulletin or on bulletin board at church, prayer line, Ministry of Praise, etc.)

4. Homebound: Do those who are homebound have the opportunity to receive the Eucharist? If so, who are the ministers, how frequently do they visit? (Please attach a listing of the names and contact information for the homebound of the parish, as well as a listing of those who are visiting.) Do those who are homebound have the opportunity for the Sacrament of Penance and the Anointing of the Sick? If so, how frequently?

6. Hospitals: Is the parish responsible for the pastoral care of those in a local hospital? If so, do you share this responsibility with another parish? Is someone coordinating this ministry? Are others in the parish providing this ministry? If so, please attach a listing of names and contact information? Is the priest called for the Sacraments of Penance and Anointing of the Sick?

7. Nursing Homes: Is the parish responsible for the pastoral care of those in a nursing home in the area? Do you visit those from the parish who are in nursing homes in other geographic areas? Who is coordinating this ministry for the parish? How frequently do these visits take place? Is Mass celebrated at the Nursing home? Are there Communion Services, rosary? (Please attach a listing of the parishioners in the nursing homes with contact information, as well as a listing of those who are visiting, etc.)

8. Funerals and Wake Services: Who does them? Is there a liturgical coordinator? Does the parish provide funeral hospitality, e.g., funeral brunch, a place to hold the brunch or lunch after the funeral?

Contacts

Provost for Education, Evangelization and Catechesis

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Suggested Process for Closing a Parish: Process and Checklist

Those leading the process of closing a parish have two categories of responsibility during this time of transition:

- To accompany the people of the closing parish on a journey of grief and sadness at the loss of what they have known and loved through reconciliation and healing to a new vision of hope and life;
- To facilitate a process that will assist each parishioner on their journey to find and experience welcome and community as they make the transition into their new parish.

STEPS IN THE CLOSING PROCESS

During this time of transition, as the people experience the closing of their parish and the integration into their new parish community, the focus of those assisting in this process is:

- The pastoral care of the people of the closing parish: understanding their anger, their grief, and their sense of loss; their need for healing and reconciliation; and the power of faith and hope to create a renewed sense of the future;
- The leadership capacity to communicate effectively with all the people thus helping them to face the challenges of the present and work together to create a more vibrant future for themselves and the parish communities to which they will belong;
- To plan and implement the required steps in closing a parish as outlined in the Policies and Procedures Manual:
 - Disposition of all properties: buildings, sacred and secular goods;
 - Communication, both internal and external;
 - Rescheduling of the sacraments;
 - Gathering and transfer of all statistical information;
 - Attention to Human Resource responsibilities;
 - Gathering of all information concerning the school and religious education programs of the parish
 - Gathering of information concerning parish activities and volunteers;
 - Gathering of information on the care of the sick and homebound;
 - Closing and transfer of all financial records;
 - Transfer of all archival documents: sacramental records, marriage files, historical documents
 - Gathering of information concerning the celebration of the sacraments;
 - Transfer of information and documents concerning the parish cemetery if one exists;

Suggested Process

1. Form a Closing Transition Team who will assist the Pastor / Administrator in this process.

Responsibilities

- To provide leadership and assistance in the process of closing the existing parish;
- To communicate with and engage the people of the parish through the entire process of closing;
- To provide accurate information about what will happen in the parish and for the people during the time of transition;
- To help people to deal with their feelings of loss and sadness and to grasp a vision of hope for the future;
- To facilitate the process of invitation and welcome into a new parish community for each parishioner;
- To plan and implement the required steps in closing a parish as outlined in the Policies and Procedures Manual.

Membership

- The Pastor / Administrator and the two lay leaders or parish representatives who attended the first deanery parish level meeting;
- Members of the Parish Pastoral Council and Finance Council, and / or other parishioners who are able to help in this process;
- Members should be invited who have the skills and experience to help with specific tasks.

Structure:

- Select a chairperson or co-chairpersons and a secretary;
- Depending on the size of the group involved in this work, subcommittees could be formed or the tasks could be undertaken by the entire committee and individual tasks assigned to a small group of members. If subcommittees are formed, select a chairperson and secretary for each group;
- Throughout the entire process, however, it is most important that this work be undertaken in such a way that the pastoral care of the people and good communication with them is always evident.

Resources:

- Members of the parish staff may serve as resources to each of the committees providing them with information, etc.;
- The various agencies noted in the Policies and Procedures Manual and the Department of Property and Assets will assist the parishes in the process of closing their parishes and provide resources to help them in doing this;
- Members of the Archdiocesan Staff are available to assist as needed;
- Additional resources are listed at the end of this document.

Function of the Closing Transition Team:

- The chairperson would be responsible for planning the agendas for the meetings and coordinating follow-up to each meeting. The chairperson would also see that a record of the process followed would be recorded and given to the pastor / administrator for the record of the parish;
 - Either the full committee or the full committee working with the subcommittees under the direction of the parish leader (pastor or administrator) would assist and support all work related to the closing of the parish.
 - The Closing Transition Team would:
 - Assure effective and frequent communication and engagement of the parish community throughout the entire process of closing the parish;
 - Be sensitive to and attend to the needs of the parish community throughout the entire process of the closing. Provide frequent opportunity to listen to and pray with the people;
 - Help in making the connections between the welcoming parish communities and the parishioners of the closing parish;
 - Develop a realistic outline of what needs to be done to close the parish, then set a timeline;
 - Involve the people of the parish in the closing process by recruiting and orienting volunteers as they are needed, providing opportunities where the knowledge or opinions of the people can be heard, or by seeking the assistance of the people as it is needed.
2. Develop a process for regular ongoing communication within the parish and with the wider community
- Help people recognize and understand the reasons for change;
 - During the entire transition process, be sensitive and respond to the feelings and concerns expressed by the parishioners as well as their expressions of hope for the future;
 - Update the parish community regularly, sharing accurate and appropriate information in a timely manner;
 - Be sure that the information regarding the closing of the parish is communicated and explained to the people of the parish first. The people should not be getting this information from the media or from other sources;
 - Correct misinformation and control rumors;
 - Manage the communication process effectively. Suggestions for dealing with the media are included in the Policies and Procedures Manual;
 - Some possible ways to do this might be:
 - Soon after meeting with DPA, gather the people of the parish in a town hall meeting to:
 - Provide people with the information shared by the Archbishop;
 - Acknowledge the good and the rich history of the parish community;
 - Recognize the pain and the feelings of loss in the community;
 - Place the closing within their own life experiences;
 - Talk about other opportunities which will be planned for prayer, listening, remembering and the process that will be followed in the months ahead.

- Place frequent, regular articles in the parish bulletin (weekly, if possible), on the parish website, and make announcements. These experiences can also be addressed in the homilies.
 - The members of the Closing Transition Team should listen carefully to the concerns and questions being expressed by the people and bring them to their regular meetings so that they can be expressed and appropriate responses developed.
 - Gather small groups in the parish to discuss what is happening: organizations, ministry groups, parish staff, parish pastoral and finance councils
 - Speak with individuals who are experiencing difficulty. Seek out those who are no longer seen in the parish and invite them to meet with the pastor / administrator or a member of the staff or a friend in the parish who might be able to help them
3. The pastoral care of the people of the parish community needs to address trauma, grief, transition, as well as welcome and integration.
- Closing a parish is a very painful process for all: for parishioners, for members, and parish leaders—the pastor or administrator Acknowledging and responding to those feelings of sadness and anger at the loss of a parish community will help the people to see they are not alone and that their feelings are normal.
 - The leadership of the pastor or administrator will be very significant in helping people to express what they are feeling and in assisting them to move towards feelings of hope and life.
 - Closing a parish is a difficult journey, encouraging the parish to make that journey together, understanding and supporting one another as they continually move forward. Those in parish leadership need to model that for the whole parish
 - Provide opportunities for the people to express and address their feelings:
 - Small groups of the parishioners gathered with parish leadership for conversation and prayer;
 - Opportunities for those in particular parish organizations to gather and talk about their memories of the parish and their group, their feelings at this time, their hopes for the future;
 - Gather the youth in the parish, talking about the change to take place, their concerns and fears, their hopes for the future and what would be important to them;
 - The senior citizen group who will have their particular concerns about the future and special needs which should be addressed;
 - With each group listen carefully to what has been said so that future planning will reflect their input;
 - Provide speakers who could come and meet with the entire parish to talk about change and transition in life. Similar opportunities might be provided for groups parishioners, staff members, etc.;
 - Provide prayer experiences for the parish community throughout the time of transition: Liturgies, prayer experiences, intercessions at the Mass, familiar devotional experiences;

- Plan meetings with the parishioners to plan for the future:
 - What are our hopes for the future?
 - What is very significant about our parish community that we would like to share with those in our new community?
 - How do we hope our new parish experience will help us to grow and to participate more fully?
 - What are the strengths, values, traditions we want to bring to our new parish?
 - Which are the groups in our parish about which we have particular concern, i.e. the youth, the elderly, the homebound, those in hospitals, ongoing ministries to the poor, refugees, the homeless, etc.?
 - Identify and list those concerns and possible ways to address them
 - Discuss ways in which the presence of the Church will continue in this community:
 - The relocation of ministries which are significant to the local community;
 - Evangelization of the community in the neighborhood;
 - Care of the property and the future of the parish property (see the Policies and Procedures Manual for information on this).
4. Activities to celebrate the history and heritage of the closing parish:
- At a meeting of the parish community, take some time to talk about the history of the parish community, to identify what people feel is the heritage of the community. Talk about ways in which their insights might be shared with their new parish communities;
 - Celebrate the particular feasts, anniversaries, events of the parish in a significant way during this transition time. At each, if it is possible, encourage those who have pictures, etc. to display them and to tell stories of the past;
 - Have parishioners' record memories and stories of their life in the parish and make these available for others to enjoy. Photographs and other visual displays can also be shared;
 - Ask organizations to have special celebrations for remembering and giving thanks during the transition period;
 - Plan an event which includes a Liturgy and reception and consider inviting the following: present and former parishioners, clergy and religious who have served in the parish as well as those whose vocations were formed in the parish, alumni of the parish school, non-Catholic Christian congregations, other friends and neighbors in the surrounding community;
 - Consider engaging the people of the parish in making as to which sacred objects would have special significance in their new parish;

5. Communicate with parishes to which the parishioners will be moving so that they can begin the process of welcoming new members into their parish
 - Identify from Archbishop Blair's Decree the parish to which the closing parish's territory will be assigned. This would be a welcoming parish for territorial parishes;
 - For an ethnic parish, talk to the people about their options in moving to a new parish: another parish of the same nationality, one of the parishes in their cluster, or the parish in the geographic area where they live;
 - Contact the pastors / administrator at those parishes to inform them of what parishioners have said;
 - Ask each of the parishioners to fill out a card with their contact information or ask pastors / administrators to send PDC/PDMS database of contact and request permission to send that info to the new parish;
 - Suggest to the new pastor that he write a letter of invitation and welcome to the new members of the parish.
 - Contact the welcoming parishes and set up a meeting between the pastors / administrators to discuss planning for the parish communities.
 - Invite the pastor of the new parish to write a letter of invitation and welcome to new parishioners.
 - Invite members of the parish pastoral and finance councils of the former parish and new parish to meet:
 - Discuss what it means to move into a new parish;
 - Share the strengths, values, traditions, and hopes of both parishes;
 - Plan ways to bring the parishes together so that people get to know one another: prayer, social gatherings, outreach activities;
 - Identify the areas about which the people of the closing parish have concern and suggestions on maintaining the presence of the church in the area they are leaving;
 - Plan ways to help the people of the closing parish to become familiar with their new parish;
 - The pastors/administrator might exchange pulpits for Sunday liturgy.

- For these Masses, the pastor / administrator of the closing parish would speak about his parish community, the people, a bit of their history and hopes for the future; asking the people to welcome them to their new parish.
 - For these Masses, the pastor of the new parish would welcome the people and speak of their new parish and its qualities, and the desire of the people to welcome them into a new community.
 - Plan meetings between members of the staff in each parish to share information on ministries.
 - Plan for similar organizations in the two parishes to meet and talk about ways of coming together; seeing how one might enrich the effort of the other.
 - Identify organizations in the closing parish which might benefit the new parish and invite their participation, thereby including what may be new organizations to the welcoming parish.
 - Plan opportunities for the youth to begin to become involved in activities together.
 - Invite members of the new community to join the closing parish for a liturgy followed by a reception. Invite the welcoming community to prepare a display showing their ministries and organizations. Ask parishioners to make displays of the new parish's groups so that they can speak to potential new members inviting them to consider joining these parish groups,
6. Plan the celebration of the closing Mass for the parish community
- There are resources for planning the closing liturgy in the Policies and Procedures Manual.
7. Plan and implement the required steps in closing a parish as outlined in the Policies and Procedures Manual:
- Communication both internal and external;
 - Rescheduling of the sacraments;
 - Gathering and transfer of all statistical information;
 - Attention to Human Resource responsibilities;
 - Gathering of all information concerning the school and religious education programs of the parish;
 - Gathering of information concerning parish activities and volunteers;
 - Gathering of information on the care of the sick and homebound;
 - Closing and transfer of all financial records;
 - Transfer of all archival documents: sacramental records, marriage files, historical documents;
 - Gathering of information concerning the celebration of the sacraments;
 - Transfer of information and documents concerning a parish cemetery if one exists;
 - Disposition of all properties: buildings, sacred and secular goods.

Resources available for Parishes

- The formation of a Closing Transition Team;
- The responsibilities of the subcommittees;
- Parishioners from parishes that have recently closed who are willing to share their experience with other parishes;
- Ways to memorialize closed parishes;
- Prayer and care resources for parishes in transition;
- The Welcoming Manual.

These resources will typically include the following:

- A description of a possible process;
- Samples of what has been done by other parishes;
- Forms that could be used to support the process.

CHECKLIST OF ACTIVITIES RELATED TO PARISH CLOSING

Canonical Implications: Section 3 of the Policies and Procedures Manual

- Determine from the Archbishop's letter whether the parish is being closed, closed and joined to another existing parish or if the parish is being merged with another to create a new parish.
- Read Section 3 for a clarification of the distinction between "suppression and joining of parishes" and "merging two or more parishes."

Closing a Parish (Technical Responsibilities): Section 4 of the Policies and Procedures Manual

- Set an appointment with the various agencies noted in each section of the Policies and Procedures Manual to discuss and schedule the following:
 - the assistance of the DPA in the care and closing of the buildings;
 - the inventory of sacred objects done by a designated Religious Goods Company;
 - the assistance of the Archdiocesan Finance Office;
 - contacting Archdiocesan legal counsel who will prepare the necessary corporate and governmental filings;
 - the assistance of the Archives in the care and transfer of parish records and history;
 - Priests should label items which belong to them personally;
 - Secular items having a value of greater than \$1,000 should be identified DPA will assume responsibility for their sale following the closing of the parish;
 - Secular items having a value of less than \$1,000 may be disposed of at the discretion of the pastor / administrator.

Sacred and Religious Goods: Section 6 of the Policies and Procedures Manual

- Work with DPA to determine what will be done with the stained glass throughout the church and any other buildings.
- Inform the people of the closing parish of the way in which sacred / religious goods will be cared for and / or disposed of.
- Discuss the placement of items of particular significance to a parish community with the neighboring parish (to which the territory has been assigned) or with an ethnic parish of the same community.
- Inform the people of the parish where religious items (larger and more significant) will be sent, if possible.

Facilities Management and Property Issues: Section 7 of Policies and Procedures Manual

- Confirm that the priests in residence have made an inventory of personal religious/sacred belongings.
- Arrange a meeting with DPA for the Pastor, Business Manager and Maintenance Person to discuss issues pertaining to the building and properties.
- Prepare and provide information on the following topics (see details in Section 7 of the Policies and Procedures Manual):
 - Windows: their condition, information on stained glass windows
 - Security System

- Fire Protection
- Utilities
- Grounds and arrangements for care
- Organ / Piano
- Appliances / Office Equipment
- Heating System
- Air-conditioning System
- Gather documents and information related to Mechanical, Plumbing and Water, and General Property Information

Communication and Public Relations: Section 8 of the Policies and Procedures Manual

- Prepare to offer immediate and accurate responses to the media when questions arise.
- Designate a spokesperson for the parish regarding all inquiries from the media.
Make all parish personnel aware of this.
- Know how to contact the Archdiocesan Department of Communications for assistance, when needed.
- Establish a comprehensive communication plan for the parish community which includes a variety of means of communication: town hall meetings, small group gatherings, bulletin announcements, letters, and the parish web site.
- The purpose of these communication efforts will be the following:
 - Help people recognize and understand the reasons for change;
 - Correct misinformation and controlling rumors;
 - Communicate with all audiences;
 - Respect all constituencies;
 - Maintain calm even in the midst of critical comments and attitudes;
 - Retain a sense of the history of the parish community;
 - Listen not only to words but feelings;
 - Remain clear, consistent and focused on the tasks at hand;
 - Assure your audiences hear things from the parish leader before they hear them from the media;
 - Share information in as many ways and venues as possible;
 - Engage the wisdom of your parish community in this process;
 - Protect against abuse of media by those who have issues with the process;
 - Keep the focus on our mission as a church, praying for the people of the parish, the Archdiocese and the universal church.

Rescheduling Marriages: Section 9 of the Policies and Procedures Manual

- Complete Section 9 of the Policies and Procedures Manual.
- Complete the Marriage Rescheduling Form.
- Attach the original to the couple's Marriage Preparation File.
- Mail a copy of the Marriage Rescheduling Form to the parish where the wedding will be held.
- Give a copy of the Marriage Rescheduling Form to the couple.
- Transfer the Marriage Preparation File (with the Marriage Rescheduling Form attached to it) to the pastor of the parish where the marriage will take place, after the couple's marriage preparation is completed.

Parish Statistical Information: Section 10 of the Policies and Procedures Manual

- Coordinate with the Chancery regarding the transfer of sacramental registers and marriage files to the Chancery where they will be permanently stored.
- Assemble, pack and label all records to be transferred to the Chancery.

Liturgical Issues: Section 11 of the Policies and Procedures Manual

- Develop a plan for spiritual gatherings that will help to support people in the process of closing their parish. Some possibilities to consider:
 - Evening prayer;
 - Solemn exposition of the Holy Eucharist;
 - Parish Mission on themes of change, trust, hope, faith, grieving;
 - Opportunities for prayer and reflections for individual parish groups and organizations;
 - Plan for the Mass which will mark the closing of the parish--refer to Section 11 for further details.
- Develop a plan for communal experiences that will bring the people of the parish together. For example:
 - Invite parishioners to bring pictures of themselves as they celebrated various sacraments; Use these for a bulletin board or other display;
 - Display photos of past parish groups and parish gatherings;
 - Invite clergy & religious who have served at the parish as well as former parishioners to significant events;
 - Invite alumni or past membership of parish groups to a reunion or homecoming.

Ethnic Communities: Section 12 of the Policies and Procedures Manual

- Meet with the specific ethnic groups who have been served in this parish. Discuss with them ways in which their values, traditions and customs may be preserved as they join a new parish.
- Plan special gatherings of these groups to minister to their unique needs in the transition process of closing their parish.
- Discuss with them possible options for the future: joining another parish of the same nationality, joining a parish in the cluster, attending the geographic parish in the area where they live.
- Discuss ways in which the faith, traditions, customs and supportive relationships of the community might be maintained and celebrated. Consider ways to continue the particular liturgical celebrations, devotions, activities, organizations or groups of the parish.
- If the ethnic group will remain with one of the parishes in the cluster, discuss with that parish the ways in which the special devotions and customs of the community may be honored in that parish.

Human Resource Issues: Sections 13, 14, 15, and 19 of the Policies and Procedures Manual

- Give copies of the pages relating to securing future ministry (employment) in Sections 13, 14, 15 and 19, to all those on the parish staff: priests, deacons, religious and lay.
- Contact the staff of the Office of Continuing Education and Formation of Ministers for assistance with transition issues and / or programming relating to change and transition.
- The *Reduction in Parish Staff Guidelines* contained in Section 19 of the Policies and Procedures Manual “only applies to reductions in parish staff arising out of parish consolidation; it does not apply in other situations.”
- The *Reduction in Parish Staff Guidelines* applies to all lay and religious “at will” employees; it may apply to permanent deacons who are “at will” employees in a non-ministerial position; and does not apply to employees under contract. Parishes are bound by the terms of contracts.
- Read information on termination notice, severance pay, accrued vacation and benefits, and unemployment compensation in Section 19 of the Policies and Procedures Manual (Please note that one must confer with Archdiocesan legal counsel prior to undertaking any terminations or layoffs (as required by Catholic Mutual) in order to maintain insurance coverage against claims arising from such employment situations).
- Refer all employees to the Human Resources Department of the Archdiocese of Hartford who will provide transition assistance, including workshops and outplacement services. (Section 19 of the Policies and Procedures Manual).
- Encourage parish employees to take advantage of all workshops and other assistance which will be offered to help them in this transition and in finding new employment.

Catechetical Services: Section 17 of the Policies and Procedures Manual

- Complete the form labeled, *Details Concerning Religious Education/Formation Opportunities for Children, Youth and Adults in your Parish*. This information will help the welcoming parishes to support their new parishioners.
- Provide this form to the pastor of the parish(es) welcoming members of the closing parish.

Volunteer Ministry and Parish Life Activities: Section 18 of the Policies and Procedures Manual

- Complete the *Administrative Overview of Parish Ministry and Individual Ministry Data Sheet* in Section 18.
- Complete the form, *Parish Special Celebrations/Neighborhood Events* in Section 18.
- Complete the *VIRTUS Training Data Sheet* in Section 18.
- Photocopy all the forms and distribute them to the receiving parishes as indicated in Section 18.
- Hold a meeting with the parish staffs of all of the involved parishes to discuss how to incorporate volunteer ministries and special celebrations or neighborhood events.
- Health Care Services: Section 20 of the Policies and Procedures Manual.

- Complete the forms in Section 26 of the Policies and Procedures Manual concerning the Pastoral Care of the Sick and Homebound.
- Make a listing of all those ministering to the sick, i.e., Eucharistic Ministers, members of the Legion of Mary, Stephen Ministry, etc.
- Provide these forms and listings to the pastors of the new parishes.

Development Issues: Section 21 of the Policies and Procedures Manual

- Send information to the Archdiocese on any pending grant or proposal activity which will require follow-up once the parish closes.
- If a need arises, contact the Archdiocese for information on parishioners of parishes which have been suppressed. This may be of assistance to neighboring and merging parishes.

Finance Issues and Procedures: Section 22 of the Policies and Procedures Manual

- Review Section 22 of the Policies and Procedures Manual to get an overview of all financial responsibilities.
- Complete all forms as requested according to the schedule outlined in Section 22.

Cemeteries: Section 23 of the Policies and Procedures Manual

- Contact the Chancellor with issues pertaining to the care of a parish cemetery. Among issues to be considered are the following:
 - Condition and accuracy of cemetery records
 - Back up, archiving and storage of cemetery records
 - Condition of the cemetery property and maintenance needs
 - Contracts for cemetery care and maintenance
 - Status of the perpetual care fund
 - Future funding of the perpetual care reserve
 - Lot split of the property
 - Future care of the cemetery

Archives and Records: Section 24 of the Policies and Procedures Manual

- Review the Archdiocesan policy on the retention of archival documents and records that is contained in Section 24 of the Policies and Procedures Manual.
- Assemble, pack and label all documents and records.
- Transfer all financial records as directed in Section 22 of the Policies and Procedures Manual.
- In parishes that are closing:
 - Transfer all archival records as directed in Section 24 (including sacramental records and marriage files, historical documents) to the Archdiocesan Archives.

Persons with Disabilities: Section 25 of the Policies and Procedures Manual

- Complete all pertinent sections of the forms that detail your past or present “Ministries to Persons with Disabilities,” as well as the accompanying form “Accessibility Information.”
- Provide these forms to the pastors of the neighboring or new parishes the people will be attending.

Sacramental Preparation and Pastoral Care of the Sick: Section 26 of the Policies and Procedures Manual

- Complete the forms in this section:
 - Baptism
 - Reconciliation
 - Eucharist
 - Confirmation
 - Marriage
 - Anointing of the Sick / Pastoral Care of the Sick and Homebound
- Provide these forms to the pastors of the neighboring or new parishes the people will be attending.

Closing a Parish: Process and Checklist: Section 27 of the Policies and Procedures Manual

- Gather the parish pastoral and finance councils to familiarize them with the information in this Policies and Procedures Manual.
- Use the Process for Closing a Parish as your guide: Section 4.
- Form a Closing Transition Team from the councils and others from the parish to assist the pastor administrator in the process of closing the parish.
- Use the checklist marking it as tasks are completed.

Suggested Process for Merging a Parish: Process and Checklist

Parishes engaged in the process of a merger have two separate categories of responsibility during the time of transition:

- To close the existing parishes
- To engage all the people of the parish communities in the process of building a new pastorate

These two processes go on simultaneously and details of both must be attended to by the Pastor / Administrator and parish leaders.

A Merger Transition Team is recommended to provide the needed collaborative leadership to support the Pastors/Administrators in preparing all that is necessary to establish the new merged pastorate. This Team is led by the Pastors, or Administrators and two representatives of each parish. These leaders may wish to invite members of the Parish Pastoral Council and Finance Council of the parishes or other parishioners to serve on the Team. Members of the Team offer their expertise and leadership skills in order to insure a smooth transition by assisting with the procedures necessary to close the original parishes, and then form one new parish community. They do this with the assistance of DPA who will help to facilitate this process in the parishes and will provide additional resources as needed.

The current Pastors/Administrators of the merging parishes are responsible for maintaining the existing services in the respective parishes and providing staff coverage, even if temporary or transitional. They consult, when appropriate, with the respective Parish Pastoral Councils and Finance Councils regarding the work of the Merger Transition Team.

While the new parish will begin on the date indicated in Archbishop Blair's decree establishing the parish, it is anticipated that the new pastor will be named by the Archbishop six to eight weeks prior to that date. After the pastorate is established, at the discretion of the new pastor, the Merger Transition Team may continue as needed in order to assist with the beginnings of the new parish, its ministries and administration. However, it is suggested that the Team would continue in this role for no more than six months. In some parishes the decision may be made to discern a Parish Pastoral Council and Finance Council for the new parish as a part of the transition process.

STEPS IN THE MERGER PROCESS

During the time of transition, it is recommended that members of parishes slated for a merger get together to begin the process of forming a parish community, the focus of the process being:

- The pastoral care of the people in the existing parish communities: their hopes for the future; their spiritual and formational needs; the concerns, and difficulties they may be experiencing due to the changes in their present parish, which may in some instances include the closing of their current parish;
- Collaboration among the people in the existing parishes in the merger process;
- Effective and on-going communication with members of each parish community that ensures people are kept up to date on all aspects of the merger process as it evolves.

Committee Recommendations**1. Executive Committee****a) Membership**

- i. The pastor/parish administrator and select members of each parish's parish council and finance council
- ii. The Executive Committee should be made up of people willing, able and qualified to assume leadership oversight of the merger process

b) Qualifications

- i. Ideally - people of faith with demonstrated people of the parishes through the entire process of merger
- ii. Organize and oversee teams and committees involved in the merger process
- iii. Facilitate the smooth transition of members of the parish communities into a newly merged parish
- iv. The Executive Committee is also responsible for the eventual creation, execution and implementation of a strategic pastoral plan for the new parish - a plan that supports (not in conflict with) the strategic plan of the Archdiocese
- v. The components of the parish strategic pastoral plan include:
 - Mission - describing the purpose of the parish in service to the community where it exists
 - Vision - a compelling statement of what to achieve in three years - i.e., a statement describing how the parish will be different in three years
 - Strategic Objectives - 3 to 5 initiatives that in three years will make the parish vision a reality
 - Goals - associated with each strategic objective and action plans for achieving the goals
 - Guiding principles - behaviors that will help shape the culture of the new parish
 - For additional information on strategic pastoral planning - see Appendix A

c) Resources

- i. Parish staff members may be called on to serve on an as-needed basis to provide data, information opinions/feedback as needed.
- ii. Office of Pastoral Planning and other Archdiocesan Staff as needed

2. Merger Transition Team**a) Suggested Membership**

- i. The pastor or parish administrator, parish and finance council presidents as ex-officio members
- ii. Three people from each of the merging parishes
- iii. NOTE: It is recommended that the Merger Transition Team have no more than 10 members

b) Qualifications

- i. People trained in change leadership - i.e., people qualified to manage change dynamics - including those skilled in dealing with the emotional fallout of a merger process.
- ii. People trained in a consistent 'strategic pastoral planning' process

c) Responsibilities

- i. Recruit and orient volunteers for the subcommittees
- ii. Coordinate the work of the subcommittees
- iii. Provide leadership for the process of merging the existing parishes into a newly merged parish community
- iv. Prepare the final plan to be recommended to the new pastor of the merged parish
- v. The recommendation of a new name for the merged parish

d) Resources

- i. Parish staff members may be called on to serve on an as needed basis to provide data, information opinions/feedback as needed.
- ii. Office of Pastoral Planning and other Archdiocesan Staff as needed

3. Subcommittees - some suggestions include:

- Liturgy and Worship
- Parish Ministries and Outreach
- Parish Life
- Communications - Internal and External
- Finance
- Facilities, Building and Properties
- Parish Staffing and Administration

a) Qualifications and Suggested Membership

- i. People from each parish who are qualified, willing and able to serve, based on their faith, knowledge and experience
- ii. Recommended size: 5 to 8 people max (ideally 4 from each parish)

b) Responsibilities

- i. The subcommittees are responsible for executing the work assigned to it and for reporting back results according to the format and schedule established by the Merger Transition Team.
- ii. The work of these subcommittees, their discussion at the full meetings, and their consultation with the people of the parishes will be directed toward the execution the parish strategic pastoral plan

c) **Resources**

- i. Parish staff members may be called on to serve on an as-needed basis to provide data, information opinions/feedback as needed.
- ii. Office of Pastoral Planning and other Archdiocesan Staff as needed

Merger Process Steps**1) Executive Committee meets to set the stage for merging and strategic pastoral planning by considering the following questions:**

- a) What does it mean to merge, to form a new community?
- b) What are the hopes and concerns of the community as this change is taking place, and how will these be addressed?
- c) What do we want to be as a new parish in terms of:
 - **Parish Mission:** a concise statement of purpose unique to the parish community
 - **Parish Vision:** a clear, compelling description of a desired future state for the parish
 - **Parish Guiding Principles:** 'behaviors' that guide the way people work together and reveal what they stand for - similar to a person's 'values'
- d) What are the best/most effective ways of remaining in communication (two-way) with our parish communities
- e) How will we honestly/effectively address areas of tension or concern within our parishes?

2) Based on information gathered in Step 1d (above), the Communications Subcommittee develops a process for regular ongoing communication within the parish and the wider parish community

- a) Help people recognize and understand the reasons for change
- b) During the entire transition process, be sensitive and respond to the feelings and concerns expressed by the parishioners as well as their expressions of hope for the future
- c) Update the parish community regularly, sharing accurate/appropriate information in a timely manner.
- d) Be sure that the content and timing of communication is the same in each parish
- e) Correct misinformation and control rumors
- f) Manage the communication process effectively

3) Parish Life Committee gathers/provides background information for the Merger Transition Team

- a) History of the merging parishes - positive and negative
- b) Information about the local community in which the parishes are located, including traditions and customs
- c) Hopes the people hold for the future
- d) For each parish
 - Sacramental data and liturgical life, and ministries of the parishes
 - Liturgical life and Mass schedules
 - Parish employees, organizations and ministries
 - Facilities - i.e., buildings
 - Financial records
 - Sacred/secular objects inventory
 - Seating capacities of each parish
 - Current strategic plan (if it exists)- i.e., Vision, Mission, Guiding Principles/Values; Strategic Priorities/Goals, etc.
 - Others - as needed

Strategic Pastoral Planning Steps - See Appendix A below

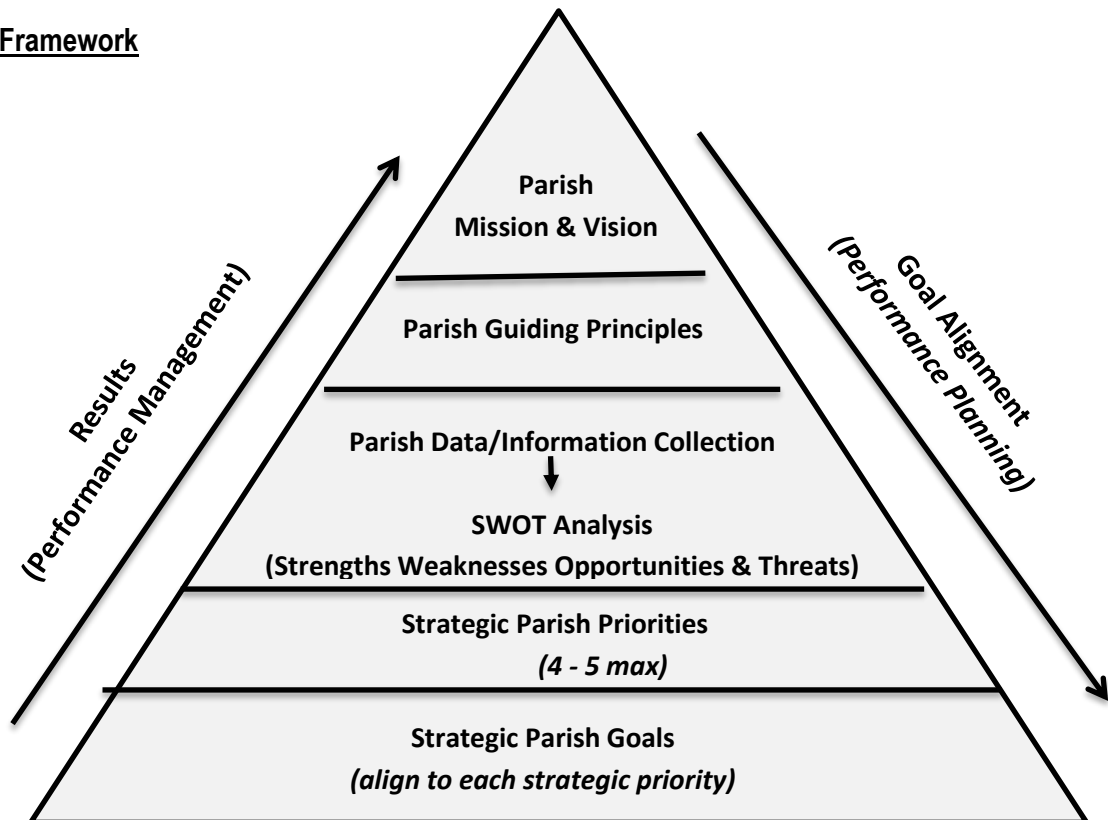
1. **Select approximately 40 people (20 from each parish - if the merger is for 2 parishes) to engage in a 3 step process the objective of which is the documentation of a 1st draft strategic pastoral plan for the new parish. The 3 steps in the process are:**
 - a) Mastering the Change Curve Workshop
 - b) Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis Exercise - see Appendix B below
 - c) Introduction to Strategic Pastoral Planning

NOTE: Contact the Office of Pastoral Planning to secure a facilitator for these sessions
2. **Create a draft vision statement - a clear, compelling description of a desired future state for the parish (ideally 3 years in future)**
 - a) Select a writing committee
 - b) Hold a meeting of the people of all the parishes (develop an agenda which will help to identify responses to the above questions)
 - c) Draft a purpose statement
 - d) Invite feedback from the parish communities
 - e) Revise - Publish the final statement

Appendix A: Steps in Strategic Pastoral Planning

1. Parish leaders come together to propose mission and vision statements for the parish, or refine what currently exists.
2. Share the Mission/Vision with parishioners for feedback - consider feedback and finalize mission/vision
3. 20-25 people from each parish participate in 3 workshops that set the stage for strategic pastoral planning
 - a) Mastering the Change Curve - a 2.5 hour program that promotes an understanding of people's personal/unique reactions to change
 - b) SWOT Analysis Exercise - a 3 hour program that allows parishioners of merging parishes to begin the process of prioritizing/strategizing/addressing the key issues the new parish will be confronting
 - c) Intro to strategic pastoral planning - a 2.5 hour program providing basic knowledge of strategic planning
4. Parish leaders use the results of the SWOT analysis to create/implement a strategic pastoral plan

Strategic Plan Framework



- **Parish Mission:** a concise statement of purpose unique to the parish community
- **Parish Vision:** a clear, compelling description of a desired future state for the parish
- **Parish Guiding Principles:** 'behaviors' that guide the way people work together and reveal what they stand for - similar to a person's 'values'
- **Strategic Parish Objectives:** The top 4-5 overarching requirements that together achieve the vision
 - **Strategic Parish Goals:** The specific intentions that together achieve a strategic priority
(usually involves several people working together)

Strengths, Weaknesses, Opportunities Threats (SWOT) Analysis

SWOT Purpose: Investigate ways to improve the overall effectiveness of an organization by looking at its *Strengths, Weaknesses, Opportunities and Threats*

Goal: Identify, prioritize, the most important short and/or long-term issues facing an organization

- **short-term** refers to issues that can be addressed within the 12 months
- **long-term** refers to issues that can be addressed within the 2-3 years.

Definitions:

- **Strengths** - What an organization does well and need to keep doing because of the positive impacts and value these strengths bring to the department, unit, institution, etc.,
- **Weaknesses** - What an organization does not do well. If addressed, the outcomes could make the organization significantly more effective.
- **Opportunities** - What an organization can quickly and/or easily do to improve, but has not done yet. Opportunities are “low-hanging fruit,” that if addressed could make the organization significantly more effective.
- **Threats** - What an organization needs to address right away. If nothing is done about these threats, it runs the risk of getting into serious performance problems on multiple fronts.

First Round Exercise

NOTE: For this exercise, you will need a minimum of twenty participants; a large/open gathering space; flip charts; markers and four flip chart size pads of paper (with sticky backs) that you can post on walls or four easels stands with flip chart paper. It is best to place the easels in four corners of the room. If using the sticky back pads, set up four stations - ideally in the corners of the room.

- 1) Break participants up into 4 groups - one group for each of the 4 SWOT categories - i.e., one group for Strengths, one for Weaknesses, etc. and have them gather at one of the four stations in the room.
- 2) Considering the organizations' vision, generate a list of as many Strengths or Weaknesses or Opportunities or Threats (depending on the group) as possible. Be sure to number each item in the list, as it will make the 'voting' required to prioritize the list that much easier. This should take about 15 minutes.
- 3) When time is called, gather all four groups together and have a spokesperson from the “Strengths” group read out loud, the list of items generated by the group.
 - a) Ask if clarification of any item is required. This will ensure that everyone has a common understanding of each item.
 - b) Take time to solicit from people in the other three SWOT categories anything they believe should be added to the list of items. Be sure to number all new items.

- 4) All participants take about 5 - 10 minutes to identify what she/he believes to be the most important items in the list (each person gets to pick 1/3 of the total number of items - e.g., if the list contains 21 items, each person can select 7 items).
- 5) Using colored dots or simply counting off by a show of hands, go through the list item by item to determine how many 'votes' each item received. Write down the number of votes each item receives.
- 6) When done with Step 5 - identify the top 4-5 items receiving the most votes.
- 7) Repeat steps 3-6 for the 3 remaining SWOT categories.
- 8) Once the top 4-5 items in each list have been identified, list them together on a new sheet of paper - numbering each one. , another final round of 'voting' ensues.
 - a) Create a new list of all the top 4-5 items that received the most votes
 - b) Considering only the top 4-5 items in each SWOT category together, each participant now selects 1/3 the total number of the top vote-getters - e.g., if a total of 20 items across all SWOT categories was generated, each person gets to pick 7 items (roughly 1/3 of 20).
 - c) Once again repeat the process to tally the votes each items received as in Step 5 above, and then determine which items received the most votes. These top five or so items should be discussed to determine if they do indeed represent the most critical areas of focus and can be used to create 'strategic objectives' in a strategic plan.

Key questions to test the validity of the items as possible of strategic objectives

- Do the top items selected drive the organization toward achievement of its Mission and Vision?
- Do they align with the organization's Guiding Principles?
- Do they represent improvement over the current state?
- Will attending to them result in significant/positive impacts on client/employee satisfaction?
- Are they within the organization's organizations ability to address, in terms of time, resources and funding?

Appendix B: Sample Bulletin Announcements and/or Homilies on Merging**B-1: Bulletin Announcement - by Fr. Robert Turner, explaining the reasons and methods to be employed in merging the parishes of St. Monica Parish (Northford) and St. Augustine Parish (North Branford)**

Brothers and Sisters,

I write about a very important process our parish communities are going to be undertaking this fall. As you know, the archdiocese is in the process of planning for the future. We simply have too many parishes, not enough people or priests, and are so preoccupied with maintaining the status quo that we are having a difficult time proclaiming the Good News of Jesus Christ. When we are drawn inwardly and look only at our own needs we fail to see the whole world around us hurting to be involved in the life of God. Pastoral planning is all about orienting ourselves—in the words of our Holy Father Francis—to become “missionary disciples,” ready to engage a world desperately in need of God’s healing. It is a sobering fact to realize that continuing on a path of mere maintenance means limiting our ability to proclaim the Good News.

This pastoral planning process is meant to show us what we are doing well, where we need work, highlighting easy ways of improving as well as adapting ourselves to address significant threats for our future capacity to make disciples of Jesus. I am convinced that at the end of this process we are better able to proclaim the Good News and live it credibly as one combined parish community with two “worship” sites. Our task in these coming months is to open ourselves to the inspiration of the Holy Spirit, to honestly look at our situation and thereby discern an effective pastoral plan that will enable us to engage people in our town to consider the message of God’s love in Jesus Christ.

We must remember, in the midst of this process, that we are all united in one, holy, catholic, and apostolic church. Our parish church is the place we congregate together to hear the Word of God, to receive the Sacraments, to learn and serve one another. The physical building is an important place, but we, as members of the living temple, are the church—the community gathered around Christ. We build to have a place for fitting worship but we can’t be afraid to realize the church is more than a building. We also have to realize that we are brothers and sisters in Christ. We are family. We aren’t separated along lines of race or socioeconomic class — we are one body in Christ. In heaven, please God, we won’t have the people from North Branford in one corner and the people from Northford in another—we will simply be citizens of the heavenly city which begins now in the hearts and lives of our people.

With all this in mind, how is the process for us going to unfold? Over the next few months the archdiocese and I will be facilitating meetings with our parish councils, finance councils, parish trustees, and others I’ll appoint. As parishioners, your input is vital, but we also recognize that a meeting of potentially hundreds is impossible to facilitate; thus, the “work” will be accomplished through those you have elected via the parish council as well as the finance councils and parish trustees. The calendar of meetings will follow this column and the results of those meetings via abridged minutes will be published. If you wish to see the complete minutes, you are welcome to do so. At any time in the process you can voice your opinions to me, our staff, or to our parish councils. Any suggestions or opinions will be considered at subsequent meetings. You will also have the opportunity to comment on results of meetings through an online survey or, if you prefer, via handwritten responses to the same questions.

Following are the dates and description of the meetings scheduled:

- On 14 September 2015 18:30-20:30, in St. Monica Parish Hall, our first meeting will be to conduct a strengths, weaknesses, opportunities, and threats (SWOT) analysis. This meeting is meant to critically look at our parish situations and determine talking points for each of these categories. This material is then used in the development of a strategic pastoral plan. The results of this meeting will be published in the bulletin and people can comment or add their own ideas via online survey or in written format. Those additions will be considered in the next meeting.
- On 28 September 2015 18:30-20:30, in St. Monica Parish Hall, our second meeting will be to conduct a change readiness seminar. This is important because after digesting the SWOT analysis, we are going to have to make some changes to how we do things to make our task of proclaiming the Good News more effective. Change is hard, and this seminar is meant to help explain the process of change.
- On 5 October 2015 18:30-20:30, in St. Monica Parish Hall, our third meeting will begin the process of developing a pastoral strategic plan. By developing a vision statement from our mission, the SWOT analysis will assist us in focusing on areas where and how we can better love God, love others and in making disciples. These goals will be matched with performative steps to be taken to make our position in proclaiming the Good News that much more effective.

In conclusion, pastoral planning is nothing more than looking honestly about where we are, and what Christ calls us to be doing. May the Holy Spirit enlighten and inspire us to bridge the gap and thus become an effective witness to the saving work of Christ to the glory of God and the salvation of souls.

In the Lord,
Fr. Robert

B-2: Homily by Fr. Timothy O'Brien setting the stage for the merger of Immaculate Heart of Mary Parish (Harwinton) and Immaculate Conception Parish (New Hartford)

HOMILY - TWENTY-FOURTH SUNDAY IN ORDINARY TIME

September 12/13, 2015

A short time ago someone wrote: "a parish is the presence of the Church in a given territory, a place for hearing God's word, a place for growth in the Christian life, for dialogue, proclamation, charity towards those in need, worship and celebration.

- "A parish is a sanctuary where the thirsty come to drink in the midst of their journey. It is a place of constant missionary outreach."
- "Parishes cannot simply seek to preserve themselves. Rather they must continually seek to renew themselves so that they are oriented toward their mission, more open and inclusive, more able to elicit a positive response from all of those that Jesus calls to friendship with himself."

You can all probably guess whom I am quoting. His name is Francis. The Pope has shown that he is able to say some things that have surprised and inspired a lot of people. But, I have to say from my heart that I believe that time and again he has shown us why the Holy Spirit at this time chose him to be the leader of the Catholic Church.

Over the past year, I have seen within the Archdiocese of Hartford, the beginnings of a response to what Pope Francis has said about renewing our structures so that our focus – first and foremost – is on our mission. Our mission to:

- Be the presence of the Church,
- A place to hear God's word,
- A place for the fostering of Christian life,
- A place for dialogue, proclamation, charity, worship and celebration,
- A place for the thirsty to quench their thirst in the middle of the struggles and difficulties that they are experiencing in life,
- A place to reach out and offer the friendship of Jesus.

I first entered the seminary to begin my formal training to be a priest in 1989. It was at the very end of August, so it was just over twenty-six years ago. So, I can't say that I have been doing this for half my life, but pretty close to it. And honestly, it was just about twenty-five years ago, when I became aware that the church that I had always known was changing in some dramatic ways. I remember when the Archdiocese of Detroit, announced that parishes were going to merge and to close. It was difficult for parishioners. I think that had not seen the bigger picture and were prepared for what was happening.

In the twenty-five years since then, almost every other diocese in the country has done what was done in Detroit. They have looked at what they had – parishes, schools, rectories, offices, convents, buildings, numbers of priests and parishioners, ministries, and asked, "What is our mission? What do we do to emphasize what is essential? What do we hold on to, improve, and expand? What do we let go of?"

I feel, above all, my friends – and I am aware that I am adding more context and explanation to what I said two weeks ago – that it is my obligation as your pastor to speak to you in a way that helps you to know and helps you to be prepared for what I know is going to be some changes within the Archdiocese of Hartford. And, make no mistake, this is not just me. This is not Father Tim telling you what he feels is best. But this is me, Father Tim, your pastor, telling you what I know the Archdiocese has formulated as the direction that we and all other parishes need to take so that we as a church are renewed and focused – first and foremost – on our mission. As I was thinking about all of this over the last several days, the very first line struck me in the first reading from the book of the prophet Isaiah. “The Lord God opens my ear that I may hear.”

Yes, my friends, it is important for us to hear and to listen. To hear, yes; to listen, yes; and yet to be afraid? Absolutely not. And this is what I want you to hear and to listen to. The Archdiocese has set as the model for linked parishes that they will be merged. To be absolutely clear, it is my understanding and my expectation that within the next 18 to 24 months (though that could change one way or the other depending on a number of different factors) that Immaculate Heart of Mary and Immaculate Conception Churches will be merged into one parish.

What does this mean?

- As I said two weeks ago, the parish staff of each is already working together collaboratively, effectively and with less expense to make sure that all of essential things of parish life continue. In many respects, I have already seen that they are continuing better than ever before.
- In the near future, there will be one parish office. That office will be in New Hartford. Phone calls made to the Harwinton office will be automatically forwarded to New Hartford.
- In the middle of December, the two parishes will have one weekly bulletin and one website.
- After the merger, there will be one parish with two churches, two worship sites.
- And let me underscore this point, I am not talking about one parish with one church. I am talking about one parish with two churches.
- After the merger, there will be one parish council, one finance council,
- Ministries will work together even more than is the case already.
- There will be one “set of books” meaning that there will be one budget, one main checking and one main savings account and the money will be used in the way that best supports our mission.
- There will be one coordinated faith formation program that operates in Harwinton and in New Hartford.
- Whether anyone lives in Harwinton, Torrington, Barkhamsted or New Hartford won’t matter.
- What will matter is that we will work together because working together is all about capitalizing on the strengths of each parish.

The parish office will be in New Hartford because the rectory/office in New Hartford is the better place to have the office. That is, the building itself is a better office space than the rectory/office in Harwinton. Yet, Immaculate Heart of Mary is much bigger than Immaculate Conception. That is why our large gatherings – whether it is the Easter Vigil Mass or the Christmas concert is there. Immaculate Heart of Mary also has the social center for parish gatherings.

Two weeks ago in my homily and in one of my announcements at the end of all of the Masses, I spoke about bringing together a group of twenty people from each parish to look at all of the strengths, weaknesses, opportunities and threats that we – both parishes – are facing. This is so that we can articulate a new mission for Immaculate Conception and Immaculate Heart of Mary. But it is also so that we can look together at the challenges and opportunities of merging our two parishes into one.

The reality, my friends, is that the decline in the number of priests, the decrease in the number of people going to church, the shifts in population from the cities to suburbia, or to places where there are more work opportunities or more sunshine has affected us just as much as it has affected pretty much every other part of the country. So, we are faced with a reality that is very challenging.

I have to honestly say to you that any one of you could probably ask me a dozen questions wanting to know specifically about this or that aspect of our life and I won't have the answer. That is, I won't have it today. Over the last several days, I have said to people, "write down your questions. They will help us look at a hundred things that I am not nearly intelligent or holy enough to have thought of yet."

I will say that to you, too. If you have questions, send them to me. And please don't just grab my attention at the end of Mass, offer your question and leave for home. After the first two people do that, I won't be able to remember much that follows. Instead, send me your questions and in that way you will be part of helping to shape our future, you will be part of helping to renew our effort to make sure that above all we are focused on the mission that has been given to us by the Lord himself. What is the best expression I know of what the Lord wants us to do? It comes at the end of the Gospel of Matthew where he says to his followers "God and make disciples of all nations, baptizing them in the name of the Father, and the Son and the Holy Spirit."

I really believe that we accomplish that when we have – yes, faith, hope and love – but also when we are united. And unity is the message that I offer to all of you today. Our future is one of being united together – Immaculate Heart of Mary and Immaculate Conception – one parish – yes, two churches, - but one parish, one people, one effort, one mission; strength adding to strength that will bring us all – and I hope all to whom we minister – to the friendship with Jesus to which we are all invited.

B-3: Bulletin Announcement by Fr. Timothy O'Brien explaining the merger and the process involved in merging Immaculate Heart of Mary Parish (Harwinton) and Immaculate Conception Parish (New Hartford)

This weekend, there will be forms out at both churches – and on each of the two church websites – for you to offer your suggestions for the name of the new parish that will be the result of merging Immaculate Conception Church and Immaculate Heart of Mary Church.

As I said last weekend at the end of each Mass, there will be a new name for the parish structure that will have two churches. This is new for us in the Archdiocese of Hartford. But, it began to happen in other parts of the country over ten years ago. And, in fact, we will not be the first merger of Catholic parishes in the Archdiocese. A few months ago, Saint Augustine Church in North Branford and Saint Monica Church in Northford were merged to form Saint Ambrose Parish. If you find the website for “Saint Ambrose Parish, North Branford, CT” you will find the two churches, locations and Mass times for Saint Augustine and Saint Monica. It is my understanding that in the next couple of years we will see a number of mergers of linked parishes.

What does it mean for our two “linked” parishes to be “merged?”

- There will be one parish with two churches.
- There will be one Parish Council, one Finance Council.
- The checking account will be in the name of the new parish.
- Savings will be consolidated.
- Offertory income and gifts will be used to maintain the churches and minister to the needs of parishioners and the greater community.
- There will be one Mission Statement, one Vision Statement and one set of strategic goals that will shape our priorities for the next 3-5 years.
- There is an opportunity to develop new ministries that respond to the needs of parishioners, couples, young families, youth and the more seasoned members of our parish community.
- Religious education in Harwinton and New Hartford will be guided by one set of goals, objectives and priorities.

Why is the Archdiocese asking linked parishes to merge?

The Archdiocese is working on an archdiocesan-wide Pastoral Plan to ensure that parishes are wisely using the limited resources to fulfill their mission. The fact of the matter is that throughout the three counties of the Archdiocese (Hartford, New Haven and Litchfield) the past several years have shown a significant decline in income, Mass attendance, and enrollment in faith formation. Certainly, over the next few years, a number of parishes will close. But, every parish now has to ask itself how it can operate – and fulfill its mission – in the most efficient manner possible. The merger of Immaculate Conception and Immaculate Heart is more cost effective and efficient than the linkage that we have had over the past five years.

What are the benefits to our two parishes merging?

I feel that the most important benefit is that there is strength in numbers. Together, we have both the resources and the people to carry out a broad range of faith formation (for youth and adults) and ministries that effectively serve the whole community. I am calling for the ministries of each church to proactively explore how they can work with the ministries of the other church. We are, after all, one Body in Christ, and brothers and sisters to one another.

One thing that I have noticed lately is an increase in the number of parishioners who now go to “the other church” for Mass. I take this as a very positive sign of the fact that we are truly becoming one community.

What are the challenges that arise from our two parishes merging?

I know that there will be a lot of questions, problems and concerns about this process. But, I have to honestly say that I feel that the single greatest challenge will be that all of us can begin to think in a “bigger” way than we ever have before. After all, once the merger has taken place, we will be one parish made up of two churches, two rectories, two garages, one barn, a social center, the Father Finn Center and a two story religious education building slated for demolition. More to the point, we will be a parish of some 1500 families. And we will share in the responsibility of making sure that we are a place of mercy and love, a parish alive with the Spirit and dedicated to living and proclaiming the Gospel of Jesus.

What steps do we anticipate over the next several months?

- Suggesting in April names for the new parish structure.
- Voting in May on the top five names suggested.
- A new Parish Mission Statement, Vision Statement and Strategic Goals.
- Providing the Archdiocese with some practical information they need. This pertains to details about our buildings and finances.
- Submitting all necessary information to Archbishop Blair.
- Archbishop Blair consults with the Presbyteral Council (a council of priests of the Archdiocese that advises him).
- The Archdiocese’s lawyers provide us with a new set of Articles of Incorporation and tax identification numbers.

How long will this process take?

My best estimate is that the process will be done by the end of the summer or early Fall.

Who has the final say in the name of our new parish structure?

The Archbishop will have the final say.

CHECKLIST OF ACTIVITIES RELATED TO PARISH MERGING**Canonical Implications: Section 3 of the Policies and Procedures Manual**

- Determine from the Archbishop's Decree letter whether the parish is being suppressed and joined to another existing parish or if the parish is being merged with another to create a new parish.
- Read Section 3 for a clarification of the distinction between "suppression and joining of parishes" and "merging two or more parishes."
- Gather parish pastoral and finance council to familiarize them with the information in Section 3 also.
- Form a Merger Transition Team from the councils and others from the parish.
- Use the Process for Parish Mergers as your guide: Section 5.

Merging a Parish: (Technical Responsibilities) Section 5 of the Policies and Procedures Manual

- The pastor of the new parish will assume responsibility for the buildings and grounds of the former parishes (see Policies and Procedures Manual, Section 7).
- Priests should label items which belong to them personally;
- Secular items having a value of greater than \$1,000 should be identified.
- Secular items having a value of less than \$1,000 may be disposed of at the discretion of the pastor.
- Set an appointment with the various offices and agencies of the Archdiocese of Hartford to discuss and schedule the following:
 - the assistance of the DPA in the care and closing of the buildings;
 - the inventory of sacred objects done by a designated Religious Goods Company;
 - the assistance of the Archdiocesan Finance Office / Legal Counsel;
 - the assistance of the Archives in the care of parish records and history.
- Since all properties belonging to the former parishes become the property of the new parish, determination will have to be made about what will be transferred to the site of the new parish, i.e. sacred and secular goods.
- Once the above determination is made, the procedure for all other goods would be as follows:

Sacred and Religious Goods: Section 6 of the Policies and Procedures Manual

- Work with DPA to determine what will be done with the stained glass throughout the church and any other buildings.
- Inform the people of the merging parishes of the way in which sacred / religious goods will be cared for and / or disposed of.
- Discuss the placement of items of particular significance to a parish community with the newly merged parish, a parish with a special relationship with the closing parish or with an ethnic parish of the same community.
- Inform the people of the parish where religious items (larger and more significant) will be sent, if that information has been determined.

Facilities Management and Property Issues: Section 7 of Policies and Procedures Manual

- Confirm that the priests in residence have made an inventory of personal religious / sacred belongings.
- Arrange a meeting with DPA for the Pastor, Business Manager and Maintenance Person to discuss issues pertaining to the building and properties.
- Prepare and provide information on the following topics (see details in Section 7 of the Policies and Procedures Manual):
 - Windows: their condition, information on stained glass windows
 - Security System
 - Fire Protection
 - Utilities
 - Grounds and arrangements for care
 - Organ/Piano
 - Appliances/Office Equipment
 - Heating System
 - Air-conditioning System
 - Gather documents and information related to Mechanical, Plumbing and Water, and General Property Information.

Communication and Public Relations: Section 8 of the Policies and Procedures Manual

- Prepare to offer immediate and accurate responses to the media when questions arise.
- Designate a spokesperson for the parish regarding all inquiries from the media.
- Make all parish personnel aware of this.
- Know how to contact the Archdiocesan Department of Communications for assistance, when needed.
- Establish a comprehensive communication plan for the parish community which includes a variety of means of communication: town hall meetings, small group gatherings, bulletin announcements, letters, the parish web site, etc.

The purpose of these communication efforts would be the following:

- Helping people recognize and understand the reasons for change;
- Correcting misinformation and controlling rumors;
- Communicating with all audiences;
- Respecting all constituencies;
- Maintaining calm even in the midst of critical comments and attitudes;
- Retaining a sense of the history of the parish community;
- Listening not only to words but feelings;
- Remaining clear, consistent and focused on the tasks at hand;
- Assuring your audiences receive information from the parish leader before they receive it from the media;
- Sharing clear, accurate information in as many ways and venues as possible;
- Engaging the wisdom of your parish community in this process;
- Protecting against abuse of media by those who have issues with the process;
- Keeping the focus on our mission as a church, praying for the people of the parish, the Archdiocese and the universal church.

Rescheduling Marriages: Section 9 of the Policies and Procedures Manual

- Complete Section 9 of the Policies and Procedures Manual.
- Complete the Marriage Rescheduling Form.
 - Attach the original to the couple's Marriage Preparation File.
 - Mail a copy of the Marriage Rescheduling Form to the parish where the wedding will be held.
 - Give a copy of the Marriage Rescheduling Form to the couple.
- Transfer the Marriage Preparation File (with the Marriage Rescheduling Form attached to it) to the pastor of the parish where the marriage will take place, after the couple's marriage preparation is completed.

Parish Statistical Information: Section 10 of the Policies and Procedures Manual

For parishes scheduled to merge, coordinate with the Chancery with regard to the transfer of sacramental registers and marriage files to the new parish site where they will now be stored.

- Pack all records to be transferred to the newly merged parish.

Liturgical Issues: Section 11 of the Policies and Procedures Manual

- Develop a plan for spiritual gatherings that will help to support people in the process of closing and merging their particular parish. Refer to *Prayer and Care Resource For Parishes in Transition*. Some possibilities to consider:
- Establish a comprehensive communication plan for the parish community which includes a variety of means of communication: town hall meetings, small group gatherings, bulletin announcements, letters, the parish web site, etc.
 - Evening prayer;
 - Solemn exposition of the Holy Eucharist;
 - Parish Mission on themes of change, trust, hope, faith, grieving;
 - Opportunities for prayer and reflections for individual parish groups and organizations;
 - Plan for the closing Mass of each parish prior to the merger – refer to Section 11 for further details;
 - Plan for the first Mass of the newly merged parish; contact the Office for Worship for further details;
 - Plan for special opportunities for prayer and reflections at the first meetings of the newly merged parish groups and organizations.
- Develop a plan for communal experiences that will bring the parishes together. For example:
 - Invite parishioners to bring pictures of themselves as they celebrated various sacraments; Use these for a bulletin board or other display;
 - Display photos of past parish groups and parish gatherings;
 - Invite clergy and religious who have served at the parish as well as former parishioners to significant events;
 - Invite alumni or past membership of parish groups to a reunion or homecoming.

Ethnic Communities: Section 12 of the Policies and Procedures Manual

- Meet with the specific ethnic groups that have been served in one or more of the parishes that are merging. Discuss with them ways in which their values, traditions and customs may be incorporated into the new parish.
- Plan special gatherings of these groups to minister to their unique needs in the transition process of closing and merging.
- Plan specific ways to recognize and include these ethnic groups at the first Mass of the newly merged parish.
- Plan specific ways to include these ethnic groups at the first meetings of the newly merged parish groups and organizations.
- If the ethnic group will remain with the newly formed parish, plan ways in which the special devotions, traditions and customs of the community may be honored.

Human Resource Issues: Sections 13, 14, 15, and 19 of the Policies and Procedures Manual

- Give copies of the pages relating to securing future ministry (employment) in Sections 13, 14, 15 and 19, to all those on the parish staff: priests, deacons, religious and lay.
- Contact the staff of the Office of Continuing Education and Formation of Ministers for assistance with transition issues and / or programming relating to change and transition.
- The *Reduction in Parish Staff Guidelines* contained in Section 19 of the Policies and Procedures Manual “only applies to reductions in parish staff arising out of parish consolidation; it does not apply in other situations.”
- The *Reduction in Parish Staff Guidelines* apply to all lay and religious “at will” employees; it may apply to permanent deacons who are “at will” employees in a non-ministerial position; and does not apply to employees under contract. Parishes are bound by the terms of contracts.
- Read information on termination notice, severance pay, accrued vacation and benefits, and unemployment compensation in Section 19 of the Policies and Procedures Manual.
- Refer all employees who will not have a position to Human Resources Department of the Archdiocese of Hartford who will provide transition assistance, including workshops and outplacement services (Section 19 of the Policies and Procedures Manual).
- In selecting employees for positions in the new parish, the pastor or administrator shall take into account, first and foremost, the effective operational and economic needs of the parish, as well as job qualifications, job performance, job importance, seniority, and EEO considerations (Section 19 of the Policies and Procedures Manual).
- In the event of a parish merger where the new parish has fewer openings for employment than there were employees in the former parishes, the new parish may hire those employees with the best performance records who most closely meet the needs of the job description (Section 19 of Policies and Procedures Manual).
- All parishes either closing or merging are reminded that any severance pay requires special tax treatment according to Internal Revenue Service, publication E (Section 22 of the Policies and Procedures Manual).
- In the case of a merger, employees at the closed and merged parishes who will be retained will become employees of the new parish. Federal identification numbers of the closed and merged parishes should not be terminated until all final payroll tax returns have been filed and all W-2 and Form 1099's have been issued (Section 22 of the Policies and Procedures Manual).
- Encourage parish employees to take advantage of all workshops and other assistance which will be offered to help them in this transition and in finding new employment.

Catechetical Services: Section 17 of the Policies and Procedures Manual

- Complete the form labeled, *Details Concerning Religious Education / Formation Opportunities for Children, Youth and Adults in your Parish*.
- Provide this form to the pastor of the new parish.

Volunteer Ministry and Parish Life Activities: Section 18 of the Policies and Procedures Manual

- Complete the *Administrative Overview of Parish Ministry and Individual Ministry Data Sheet* in Section 18.
- Complete the form, *Parish Special Celebrations / Neighborhood Events* in Section 18.
- Complete the *VIRTUS Training Data Sheet* in Section 18.
- Photocopy all the forms and distribute them to the receiving or merging parishes as indicated in Section 18.
- Hold a meeting with the parish staffs of all of the involved parishes to discuss how to incorporate volunteer ministries and special celebrations or neighborhood events into planning for the new parish.

Health Care Services: Section 20 of the Policies and Procedures Manual

- Complete the forms in Section 26 of the Policies and Procedures Manual concerning the Pastoral Care of the Sick and Homebound
- Make a listing of all those ministering to the sick, i.e. Eucharistic Ministers, members of the Legion of Mary, etc.
- Provide these forms and listing to the pastor of the new parish.
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- Provide these forms and listing to the pastor of the new parish.

Development Issues: Section 21 of the Policies and Procedures Manual

- Send information to the Archdiocese on any pending grant or proposal activity which will require follow-up once the parish closes or merges.
- If a need arises, contact the Archdiocese for information on parishioners of parishes which have been suppressed. This may be of assistance to the newly merged parish.

Finance Issues and Procedures: Section 22 of the Policies and Procedures Manual

- Review Section 22 of the Policies and Procedures Manual to get an overview of all financial responsibilities.
- Complete all forms as requested according to the schedule outlined in Section 22.

Cemeteries: Section 23 of the Policies and Procedures Manual

- Contact the Catholic Cemeteries Association with issues pertaining to the care of a parish cemetery. Among issues to be considered are the following:
 - Condition and accuracy of cemetery records;
 - Back up, archiving and storage of cemetery records;
 - Condition of the cemetery property and maintenance needs;
 - Contracts for cemetery care and maintenance;
 - Status of the perpetual care fund;
 - Future funding of the perpetual care reserve;
 - Lot split of the property;
 - Future care of the cemetery.

Archives and Records: Section 24 of the Policies and Procedures Manual

- Review the Archdiocesan policy on the retention of archival documents and records that is contained in Section 24 of the Policies and Procedures Manual.
- Assemble, pack and label all documents and records.
- Transfer all financial records as directed in Section 22 of the Policies and Procedures Manual.
- In parishes that are merging:
 - Transfer all sacramental records to the new parish.
 - Transfer all other archival materials to the Archdiocesan Archives as directed in Section 24 of the Policies and Procedures Manual.
- In parishes that are closing:
 - Transfer all archival records (including sacramental records) to the Archdiocesan Archives.

Persons with Disabilities: Section 25 of the Policies and Procedures Manual

- Complete all pertinent sections of the forms that detail your past or present “Ministries to Persons with Disabilities,” as well as the accompanying form “Accessibility Information.”
- Provide these forms to the pastor of the new parish.

Sacramental Preparation and Pastoral Care of the Sick: Section 26 of the Policies and Procedures Manual

- Complete the forms in this section:
 - Baptism
 - Reconciliation
 - Eucharist
 - Confirmation
 - Marriage
 - Anointing of the Sick / Pastoral Care of the Sick and Homebound
- Provide these forms to the pastor of the new parish.

Merging a Parish: Process and Checklist: Section 28 of the Policies and Procedures Manual

- Form a Merger Transition Team to help in the process of merging the parishes.
- Follow the process outlined in Section 5 of the Policies and Procedures Manual.

Use the checklist, marking it as tasks are completed.