PARTNERS
IN THE GOSPEL

Administrative Milestones

Banking and payment processing considerations

Every parish will need to add the pastor as a signing authority on their bank account, removing the prior pastor. In addition, each online payment processing company in use within the family will need to have the pastor added to the underwriting. Parishes will likely receive communications directly from the vendors related to the underwriting change.

Calendar considerations

Every parish has a calendar filled with daily, weekly, monthly, and annually recurring events. Many of these events are booked months in advance, and many of them demand the pastor's participation. Plan on scheduling a gathering to go over the calendar for 2024-2025 no later than September 1, 2024, to avoid conflicts and make sure the pastor reserves time for the major events at each parish community.

As parish families come together, it is inevitable that there will be calendar conflicts. Each parish in the family will need to be flexible and make adjustments as necessary. Please keep in mind that a pastor's presence in the smaller communities can have a significant impact in helping them feel recognized.

- **Hold a "calendar summit."** Early in Phase 1, look both for conflicts and for areas of collaboration.
- **Plan for 2024-2025.** Each parish in the family should prepare a calendar of all events in each parish community.
- **Compare schedules and eliminate conflicts.** During this gathering, representatives from each parish should review calendars for August 2024-June 2025 and sort out dates, times, and spaces.
- **Look for opportunities for one-off events.** Use special events or parish feast days where each community invites the others in. Make sure to add these events to the calendar for each parish in the family.
- **Don't double-book.** If a parish has a major event to which parishioners at other parishes within the family will be invited (school fundraiser, fish fry, etc.), try not to schedule competing events at the other parishes.
- **Communicate clearly.** Be sure to tell the parish community about changes and events across the parish family. Promote important events in all bulletins across the parish family.

- **Be aware of parish staff holidays.** The new pastor needs to be aware of the holiday schedule for each parish for the second half of 2024. A uniform holiday schedule for 2025 should be put in place for all parishes in the family.

- **What about the Triduum? Christmas?** The Worship and Liturgy team will provide guidance and recommendations around the celebration of the Triduum and Christmas.

Base(s) of operations

An important early consideration for the pastor and parochial vicar is where they will keep primary office(s) to take appointments. If the family has three or more parishes, it may not be practical to maintain an office at each parish. When considering where to have a primary office, a pastor will want to take into account the full structure of the team. For example, if a parochial vicar is going to be assigned spiritual care over particular communities within the family, then select a model that would allow him to be close to these communities.

Some models to consider:

Model one:
- Pastor has a primary office and office hours only there.
- Vicar(s) have offices at the other parishes.

Model two:
- Pastor has a primary office, but office hours at multiple locations.
- Vicar(s) have offices at the other parishes.

Model three:
- Pastor and vicar(s) all have primary offices at one location, with office hours at other locations as well.

Model four:
- Pastor and vicar(s) only have offices and office hours at one location.

Take these factors into account when setting up a base of operations
- Availability of parking for priests and visitors
- Accessibility of offices
- Collaboration with other staff/offices
- Distance of travel for parishioners
- Greatest need/demand (school, size of community, etc.)
- How will the community respond to the model?

Shared expenses

Many parish families are made up of large, financially strong parishes and smaller and/or poorer parishes. The families have been designed to strengthen and support one another. This is an opportunity to educate all parishioners in the family about the unique needs of each parish. How are we called to work together to share our resources? What do we have to offer to our parish family? Are we ready to open our hands to new communities, or are we shut off, a "closed and elite group" as Pope Francis describes?

> *This insidious worldliness … can also lead to a business mentality, caught up with management, statistics, plans and evaluations whose principal beneficiary is not God's people but the Church as an institution. The mark of Christ, incarnate, crucified and risen, is not present; closed and elite groups are formed, and no effort is made to go forth and seek out those who are distant or the immense multitudes who thirst for Christ. ("Joy of the Gospel" 95*).

How we share our financial resources is a good indication of how open we are to the broader community. What did Pope Francis mean when he said, "How I would like a church that is poor and for the poor"?

Finance point person
Early in Phase 1, a pastor will want to consider a point person to review the overall financial performance of the parish family. This point person is not the person who is running the day-to-day finances but instead has visibility across the parish families. This will create a single point of contact for finances in support of the pastor. In addition, pastors with schools will want to evaluate the staff's skill and ability to manage the complex finances of schools. Filling gaps in the financial skills needed for schools will be critical.

Expense sharing
Until parish families become one canonical parish, finances need to be kept separately at each parish, which presents some complexity related to expense sharing. As parish families begin daily operations, they will need to identify opportunities to share expenses across all parishes. Sharing expenses may result in overall savings for the parish family as well as potential added or improved services.

Early Phase 1 shared expenses
Some shared expenses should be identified early in Phase 1. These would include:

- Priest moving expenses
- Priest salaries and benefits
- Living expenses, including rectory expenses and utilities
- Pastor and parochial vicar administrative support

Shared-expense opportunities
Shared expenses can be an opportunity to provide more and improved services to each member parish while saving money overall. Pastors and administrative leaders should exercise judgment in balancing the opportunities for savings and service improvements with the need to not change too many things at once.

Potential shared expenses could include:

- Services like janitorial, landscaping, and facility maintenance
- Technology contracts like IT support, printers/copiers, and internet service providers
- Office supplies and postage
- Any expense for shared staff
- Shared staff salary and benefits such as music, youth, or outreach ministers
- Administrative staff such as bookkeepers and facilities maintenance

Shared-expense accounting
Parishes will each keep their bank accounts and books separate as required by canon law until they officially become one canonical parish. As shared expenses are identified, there are two primary ways to process the flow of funds:

1. **Direct invoicing** of each parish sharing in the expense, using one of the suggested expense-sharing methodologies below. While easy to implement, it becomes more burdensome as the number of

shared expenses increases.

2. **Agreement ahead of time** on what expenses will be shared is the preferred approach. A separate bank account and set of books can be set up for the shared expenses. Individual parishes would keep their own accounts and books for their own parish-specific expenses and revenue. Using one or more of the methodologies identified below, each member parish moves the agreed upon amount into the shared account at the beginning of the fiscal year. This will simplify the bookkeeping process and reduce the associated labor. If necessary, a true-up can happen at the end of the fiscal year either dispersing excess funds or having each member parish cover a shortfall.

Shared-expense methodologies
Expense sharing should reflect the relative value received by each parish for a shared resource and accommodate the reality of differences in the ability to pay. Use historical data and metrics to determine the best approach for the parish family – and keep it simple so it's easily explained to parishioners and new staff. Methodologies could include:

- **Number of Masses:** For example, assume a parish family has three parishes. Each has two Masses on a weekend. Using this methodology, each parish would pay 1/3 of shared expenses. This is a convenient, easily explained metric that can be used for many different shared expenses. The downside is that it may not align with the value derived by each parish or align with their ability to pay.

- **Square footage:** This approach works for janitorial services or plant maintenance.

- **Number of registered parishioners:** This approach could be used for any shared expense, including shared staff. It is easily explained and maintained. The downside is that it may not reflect the parish's ability to pay and could vary year to year. It also may not be appropriate if one of the parishes is growing or shrinking at a rate faster than the other parishes in the family.

- **Number of givers:** Registered parishioners can sometimes have a significant number of inactive members. A more valid indicator of participation may be the number of givers depending upon the parish.

- **Ordinary income:** Ordinary income could be used to allocate shared expenses. For example, a parish family with two parishes – one with an ordinary income of $500,000 and another parish with $1,000,000 – could share expenses 1/3 - 2/3. This approach reflects ability to pay and would vary year to year.

- **Mutual agreement:** The finance councils of member parishes could negotiate a sharing percentage in absence of clear metrics or due to special circumstances. It will be important to document what was mutually agreed upon, to be transparent and to ensure future members understand the decision-making process as council members rotate.

Shared Extraordinary Expenses
There will be situations when unplanned, extraordinary expenses occur at each parish (e.g., leaky roofs or boiler malfunctions). Under normal circumstances, each parish would be financially responsible for the unplanned expense, using either reserves or securing a loan from the Parish Revolving Fund (PRF). If a parish is incurring expenses and does not have the resources to cover the cost, then one or more of the other parishes in the family may help out. In many cases, this would be preferable to a PRF loan. Such

assistance could be in the form of a loan or a gift. The parishes providing the support would need to get approvals from their respective finance councils before providing any support.

Shared Rectory Expenses

Sharing of rectory expenses will present a unique set of considerations. Expenses associated with a rectory could include mortgage, rent, utilities, and repairs. A priest who lives in a rectory may be responsible for saying Mass at multiple locations. Each location where the priest celebrates Mass should pay a share of the rectory expenses.

Shared School Support

Since schools are a ministry of the parish, they often receive financial support. While the financial support for the current year is already set, conversations about the financial support for the future can begin in Phase 1. The financial support is usually based on what the parish is willing to provide and can afford, and multiple parishes can provide different financial supports to the same school. In this case, parishes that do not have a school can choose to financially support the schools that exist within their family. School financial support is agreed upon through the budgeting process.