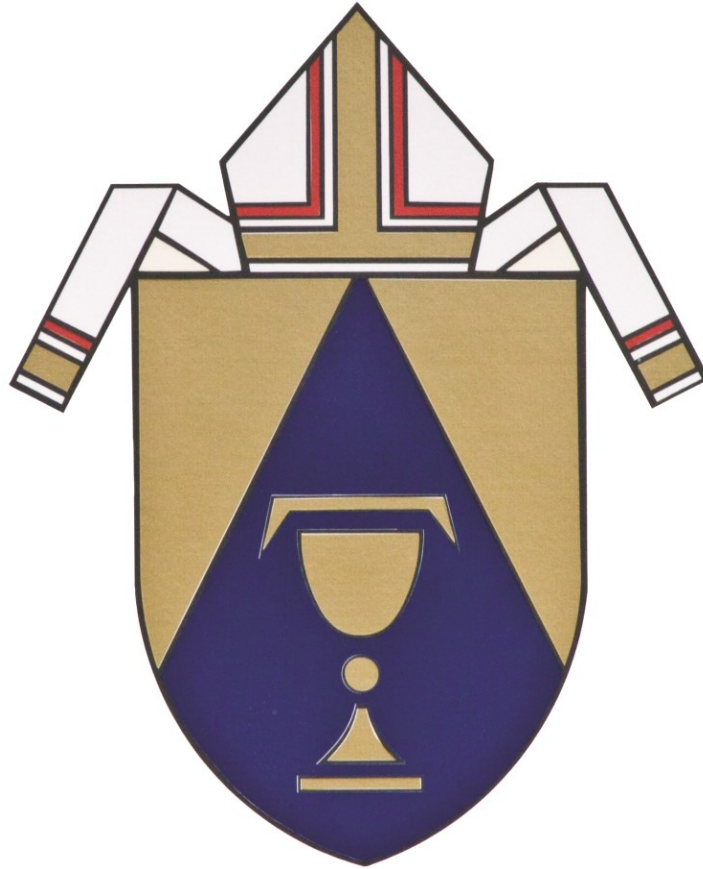


# Diocese of Sacramento

## **PERSONNEL POLICY FOR PRIESTS**



**APPROVED AND PROMULGATED**

**BY BISHOP JAIME SOTO**

**MAY 2016**

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## **FOREWORD**

by Bishop Jaime Soto

In the Eucharistic preface for priesthood, used on the occasions of ordination and the Chrism Mass, we recite these words: “Christ not only adorns with a royal priesthood the people he has made his own, but with a brother’s kindness he also chooses men to become sharers in his sacred ministry through the laying on of hands.” More succinctly, because Jesus loves His people, he chooses us with a brother’s love to share in his ministry to them.

There is no greater honor or blessing than to be part of the priesthood of the faithful. The baptism we share with all the faithful is the beginning of Christ’s preferential love for each one of us. We are part of his flock, the sheep who know the voice of the shepherd and follow him. In the unfathomable mystery of his affection for the people he has called his own, Jesus then chooses us to be sharers in his saving sacrifice for their sake.

The preface uses the language of the brother’s kindness. We can also borrow from the words of John the Baptist, in the third chapter of the gospel according to John, when he speaks of himself as being the friend of the groom. “The one who has the bride is the bridegroom; the best man, who stands and listens for him, rejoices greatly at the bridegroom’s voice. So this joy of mine has been made complete. He must increase; I must decrease.” In Spanish the expression is translated, “amigo del novio” (the friend of the groom). Jesus is the groom. The Church is the bride. We are the friends of groom who, like John, announce to the bride his coming.

It is vital for us to savor this relationship with Jesus recognizing that our fraternity is at the service of his love for the Church. With a personal affection He calls each of us to this sacramental association with him so that through us he can sanctify, teach, and govern his people.

The Priest Personnel Manual is intended to assist the priests in the Diocese of Sacramento in serving Christ, the Priesthood of the Faithful, and one another. Through the intercession of the Virgin Mary, Mother of Priests, may this tool assist us in building up the Body of Christ, the Church, into a worthy temple of living stones offering acceptable sacrifices to God through Jesus Christ. (cf. Eph. 4.12; I Pt. 2.5)

(The Preface was adapted from a presentation Bishop Jaime Soto gave the priests of the Diocese of Sacramento on the occasion of the Clergy Convocation, October, 2015)



OFFICE OF THE BISHOP

## DIOCESE OF SACRAMENTO

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### DECREE OF PROMULGATION

Diocese of Sacramento

#### PERSONNEL POLICY FOR PRIESTS

The *Priests Personnel Policy* for the Diocese of Sacramento was first promulgated in May of 1981. Following several revisions, the Policy was updated and re-promulgated in September of 1997. In 2013, the Presbyteral Council tasked the Priestly Life Committee with rewriting the policy to bring it in line with the needs and practices of the current day. Following a comprehensive process of consultation with the Presbyterate during the last several years, a final draft has been presented to me for my approval and promulgation.

Whereas, in consultation with the Presbyteral Council, I approved the re-writing of the *Priests Personnel Policy*; and

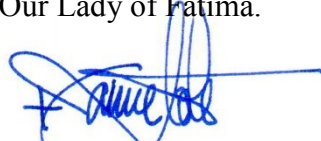
Whereas, I have followed closely the process of consultation which was carried out in the various deaneries and through the Presbyteral Council; and

Whereas, I have heard the comments and concerns expressed by members of the Presbyterate during the formulation of the this Policy; and

Whereas, I have amended and finalized this policy based on my evaluation of those comments;

Now, therefore, I the undersigned Bishop of the Diocese of Sacramento, do hereby promulgate the attached *Personnel Policy for Priests* for the Diocese of Sacramento and order it to be published on the diocesan website and included in future copies of the *Diocesan Policies and Pastoral Guidelines* binder. This *Policy* is to take effect one month from the date of promulgation.

Given at the Diocesan Pastoral Center, in Sacramento, California on this 13<sup>th</sup> day of May, in the year of our Lord two thousand sixteen, Feast of Our Lady of Fatima.



+Jaime Soto  
Bishop of Sacramento



Kathy Conner  
Chancellor

# PERSONNEL POLICY FOR PRIESTS

## Section 1. BASIC MINISTRIES, RESPONSIBILITIES AND ACCOUNTABILITY

### 1.1 General Attributes of the Priest

All priests serving in the Diocese of Sacramento are to demonstrate the following attributes:

#### 1.1.1 Personal Spirituality.

The priest is to be recognized as a man of faith and able to communicate that faith to others. This faith is to be demonstrated in his ministry to his people, in his liturgical and personal prayer (including the Liturgy of the Hours, and daily Eucharist) and in his simplicity of life, all modeled on the life and ministry of Jesus Christ, and as expounded upon by the teaching of the Church.

#### 1.1.2 Liturgical Role.

The priest is to exercise leadership in planning and presiding reverently over the Church's various liturgical celebrations in accordance with the liturgical law of the Church. He is to prepare and deliver homilies on the Word of God, which inspire the people whom he serves to lead with zeal a life of prayer and apostolic works.

#### 1.1.3 Pastoral Concern.

The priest is to demonstrate by personal example a pastoral concern and sensitivity toward all, especially the sick, the poor, the alienated and the un-churched. He is to develop cooperation and leadership among the lay faithful to address the needs and concerns of the local community as well as regional and international concerns, always in conformity with the social teaching of the Church.

#### 1.1.4 Ecumenism.

The priest is to demonstrate a willingness and capacity to work cooperatively with ministers of other faiths in accordance with the approved guidelines of the Church.

#### 1.1.5 Vocations.

The priest is to demonstrate through his own life, ministry and preaching a positive view of the ordained ministry and religious life, in order that those discerning their life's vocation might consider God's call to the priesthood, permanent diaconate or religious life, together with the recognized vocations to Christian marriage or the chaste single life. He should actively promote religious and priestly vocations.

#### 1.1.6 Fraternal Support and Cooperation.

The priest is to cooperate in a spirit of Christian fraternity and charity with the other priests in his rectory, in neighboring parishes and the deanery, as well as with the initiatives of the diocesan bishop. In doing so he is to provide an example of communion to the faithful whom he serves.

#### 1.1.7 Personal and Professional Growth.

A priest should exercise personal responsibility for personal and professional growth. He is to demonstrate initiative in seeking help and advice from fellow priests, participating in opportunities for spiritual and professional growth, and in making use of instruments of self-evaluation.

## **1.2 The Pastor**

Each parish in the diocese ordinarily will be staffed by a resident pastor, who is the proper shepherd of the parish to which he is assigned.<sup>1</sup> In rare cases, a pastor may be assigned to two or more parishes,<sup>2</sup> or he may exercise ministry with another pastor *in solidum* according to the norm of law.<sup>3</sup>

1.2.1 A pastor exercises his pastoral office under the authority of and in communion with the Diocesan Bishop, in whose ministry he shares.<sup>4</sup>

1.2.2 A pastor exercises his ministry of teaching, sanctifying and governing in cooperation with the priests, deacons and lay faithful who serve as staff, by conscientiously listening to the advice of the various consultative bodies within the parish, and by faithfully adhering to the policies of the diocese.

## **1.3 The Parochial Administrator**

In certain cases, it may be necessary to appoint a parochial administrator, who is to be a priest.<sup>5</sup> The parochial administrator fulfills the functions of the pastor for a specified time and according to the norm of law, but does not enjoy stability of office. In rare cases, when the period of time is particularly short, the term “priest-in-charge” may be used in lieu of parochial administrator.

1.3.1 It is the policy of the diocese that a priest exercising leadership of a parish for the first time be assigned first as a parochial administrator for a period of two years. Following an evaluation toward the end of the two year period, the bishop may choose to assign the parochial administrator as pastor or follow another course of action.

## **1.4 The Parochial Vicar**

Parishes identified as requiring more than one priest ordinarily will be assigned one or more Parochial Vicars. A Parochial Vicar may be assigned to assist with the ministry of the whole parish, with a specified segment of the parish, or he may be assigned to work part-time with another, for example, neighboring parish.<sup>6</sup>

1.4.1 Parochial Vicars are to work collaboratively and openly with their pastors for the common good of the whole parish.

1.4.2 The responsibilities of the Parochial Vicar should be clearly defined in the letter of appointment and in a memorandum of understanding which is to be drawn up between the pastor and parochial vicar and reviewed by the episcopal vicar for clergy within the first two months of taking office. The details of this agreement are outlined below (see APPENDIX I).

## **1.5 The Priest in Special Ministry**

From time to time a priest may ask or be asked to be engaged in a specified ministry, apostolate or advanced study which is non-parochial. Such assignments are generally for the service of the entire diocese or for the benefit of the wider Church and are completely at the prerogative of the Diocesan Bishop.

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<sup>1</sup> 1983 *CIC* c. 519.

<sup>2</sup> 1983 *CIC* c. 526 §1.

<sup>3</sup> 1983 *CIC* c. 517 §1.

<sup>4</sup> 1983 *CIC* c. 519.

<sup>5</sup> 1983 *CIC* cc. 539-540.

<sup>6</sup> 1983 *CIC* c. 545.



### **1.6 The Priest in Residence**

In certain cases, usually in conjunction with an assignment to a special ministry, a priest may be assigned “in residence” at a rectory. Depending on the nature of the assignment, the priest may be assigned to assist with parish liturgies, or may be assigned to supply in other parishes. This should be clearly established in the letter of appointment, with the understanding that any parochial responsibilities should not interfere with the priest’s primary diocesan assignment.

### **1.7 The Parish Steward and the Priest Supervisor**

In rare cases in which it is not possible to have a resident pastor, the Diocesan Bishop may appoint a deacon, religious, or lay person to serve as parish steward (known elsewhere as a parish life coordinator), according to the norm of canon 517, §2. Such persons are subject to the authority of a priest supervisor who is provided the faculties of the pastor to the parish in question. In such cases, the roles of each party are to be clearly defined in a written agreement, in accordance with Diocesan Guidelines (see APPENDIX II).

### **1.8 Accountability**

Priests exercise their ministry in the name of Christ and his Church. As such they are accountable both to the People of God whom they serve and to the hierarchical authority who appoints them. As noted above (see section 1.1.7), priests should take the initiative to constantly examine their own life and ministry to ensure that they are ever-improving examples of holiness for their people. To assist them, however, the diocese will also provide on-going periodic evaluations to ensure professional accountability. In each of the following situations, the priest being evaluated will have the opportunity to provide a response:

- 1.8.1 Newly ordained priests will be evaluated informally in discussion with the pastor and the Episcopal Vicar for Clergy.
- 1.8.2 Parochial Vicars will be evaluated annually by their pastors with a standard written evaluation (see APPENDIX III) to be presented to the Episcopal Vicar for Clergy.
- 1.8.3 Parochial administrators will be evaluated toward the end of their second year by select parishioners and staff, using an on-line survey (see APPENDIX IV) which is to be presented to the Episcopal Vicar for Clergy and discussed with the priest, prior to recommendation to the Bishop.
- 1.8.4 Pastors are to be evaluated every three years in conjunction with the parish audit or as needed. (see APPENDIX V).

## **Section 2 – WORKING AND LIVING RELATIONSHIPS**

*“In virtue of their sacred ordination and of their common mission, all priests are united together by bonds of intimate brotherhood, which manifests itself in a spontaneously and gladly given mutual help, whether spiritual or temporal, whether pastoral or personal, through the medium of reunions and community life, work and fraternal charity.” Lumen Gentium 28.*

## **2.1 General Principles**

In addressing working and living arrangements among priests, it is expected that discussions take place in a spirit of mutual respect and fraternal collaboration, with due consideration for cultural sensitivities, diverse personal backgrounds and differing expectations of privacy. Priests are to adhere strictly to the *Diocesan Code of Pastoral Conduct* (see APPENDIX VI), be mindful of the *Diocesan Sexual Misconduct Policy*, (see APPENDIX VII) and comply with all mandatory training.<sup>7</sup>

## **2.2 Working Relationships**

- 2.2.1** Priests shall have access to a suitable room for counseling and private instruction. This room shall be distinct from the living quarters of the priests and provide confidentiality in conformity with the *Diocesan Code of Pastoral Conduct*.
- 2.2.2** Parishes are to make provision for secretarial services as required by the size and needs of the parish. These services are to be available to all the priests assigned to the parish.
- 2.2.3** All priests assigned to the parish shall have access to the parish files, financial reports, record books and office equipment.
- 2.2.4** Areas of responsibility of all members of the staff are to be clearly defined in writing and made known to all members of the staff.
- 2.2.5** Priests should always show courtesy and consideration to parish staff. This includes priests notifying staff when they leave the rectory or office and when they are expected to return.
- 2.2.6** Pastors and Parochial Vicars, in particular, are to have a written agreement that outlines the areas of responsibilities of each, including:
  - a) areas in which the pastor and parochial vicar work together;
  - b) areas for which the pastor alone is responsible or principally responsible;
  - c) areas for which the parochial vicar is principally responsible; and
  - d) areas of legitimate responsibilities outside the parish (see APPENDIX I).
- 2.2.7** Pastors and parochial vicars are expected to share at least three common meals a week and to meet at least once a week to discuss parish scheduling and other issues of common interest. The latter meeting may take place during one of the common meals.
- 2.2.8** For emergency situations, pastors and parochial vicars should have each other's contact information (e.g., cell phone number) and should provide to each other and key members of the staff how to be contacted when away for an extended period (e.g., vacation).

## **2.3 Living Relationships**

### **2.3.1 Rectory Assignment**

Priests in the Diocese of Sacramento are expected to live in a rectory. The place of residence should be included in the priest's letter of appointment. The rectory is provided by the generosity of the People of God; due respect for their generosity should be exercised in the use of the rectory.

- 2.3.1.1** The rectory is to be located on or adjacent to parish grounds in order that parishioners may have access to their pastors in time of legitimate need and to provide

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<sup>7</sup> Including, e.g., state or diocesan mandated training for supervisors, harassment prevention, child protection, and elder abuse prevention.

a level of on-site security over the parish property. Whenever possible, the living quarters of the rectory, however, should be distinct and separate from the working area of the parish, including the parish office.

2.3.1.2 The rectory is the common home for all priests assigned to the parish by the Diocesan Bishop and belongs to no one of the priests individually or solely.

2.3.1.3 Without the permission of the diocesan bishop, apart from seminarians and occasional visits by family or friends, no one is to reside in a rectory other than the priests assigned to do so by the diocesan bishop. The rectory is not a residence for lay personnel or extended family.

### **2.3.2 Provisions**

The parish shall provide adequate food, cooking, housekeeping, laundry and normal amenities for social life as enumerated in the *Priests Remuneration Policy* (See APPENDIX VIII).

### **2.3.3 Privacy**

There should be mutual respect for each priest's legitimate lifestyle as well as his right to privacy and quiet time.

### **2.3.4 Guests**

Each priest has the right to receive guests into his private living quarters, always respecting the right to privacy of the other members of the household and the admonitions of the *Code of Pastoral Conduct*, most notably, that children must always be in the company of adults. In the case of overnight guests, notice should be given to other residents.

### **2.3.5 Common Areas**

Ideally, there shall be a common living room or lounge in each rectory for the purpose of fostering community life and common prayer.

2.3.5.1 Common areas of the rectory (e.g., living room, lounge, dining room, kitchen) shall be open to those persons whom anyone of the resident priests wishes to entertain, always respecting common courtesy and the privacy of other members of the household. In the event that these rooms are used for a parish function, due notice and consideration should be given to all members of the household.

### **2.3.6 Rectory Maintenance**

Pastors are responsible for the on-going maintenance of the rectory. Each parish is to have an annual budget and plan for regular rectory maintenance. In carrying out this responsibility, it is strongly advised that an independent person (e.g., a member of the parish building committee or finance council) be asked to assist with the assessment of the facility. Deans are also reminded of their responsibility during parish visitations for ensuring that "the rectory is cared for with proper diligence."<sup>8</sup>

2.3.6.1 Pastors may request, and other residents must admit, access to their private quarters, with appropriate notice and at a mutually agreeable time, at least once a year, for the purpose of assessing on-going maintenance requirements. Such access must be done with the resident present, and may be done in the company of the pastor's delegate for maintenance assessment (e.g., a building committee member).

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<sup>8</sup> 1983 *CIC* c. 555 §3.

2.3.6.2 At the time of a transition of pastors, the Episcopal Vicar for Clergy will provide a checklist of items to be reviewed and taken care of by the departing pastor prior to the arrival of the new pastor (see APPENDIX IX). This checklist should also be reviewed by a member of the parish finance council. These items include a review of inventory, cleaning of carpets and drapes, any necessary painting or repairs, ensuring that plumbing and utilities are in working order, making sure that appliances are clean and in working order, and that cupboards, closets and rooms are cleared of unnecessary clutter. Special attention is to be paid to kitchens and bathroom and to any rooms damaged by smoking or pets. If a rectory is kept in good condition, these transition items should be minor.

### **2.3.7 Smoking**

Smoking is not permitted in rectories. Damage caused by violation of this policy, e.g., to carpets, draperies, or walls, is the personal responsibility of the offending priest. Adequate provision may be made for those who wish to smoke outdoors.

### **2.3.8 Pets**

Pets can be a source of companionship for a priest. However, no pet should be introduced to a rectory except by mutual agreement among the residents of the house.

2.3.8.1 In the event of a change of residents, the existence of a pet must be disclosed and discussed prior to final assignment. In the event that compromise cannot be reached, the pastoral needs of the parish will always take precedence over the presence of the pet.

2.3.8.2 It is the responsibility of the owner of the pet to provide for all its material needs. Under no circumstances are parish funds to be used for the upkeep of the pet, nor are parish staff to be used to provide for the care of the pet.

2.3.8.3 In the event of damage to the rectory by a pet, it is the responsibility of the owner to make restitution to the parish for the damage.

### **2.3.9 Security**

Priests residing in a rectory have a right to feel safe in their home. The pastor is to evaluate the security needs of the rectory periodically, considering such items as a security system, fire protection (smoke detectors, escape routes), access by persons other than residents, etc.

2.3.9.1 Pastors may want to consider a change of keys at the transition of a new pastor.

2.3.9.2 Firearms and ammunition are to be kept in a locked gun safe or an equally secure location so as to prevent accidents. The presence of firearms and ammunition should be disclosed to other members of the household.

## **2.4 Conflicts**

In the rare event that problems may surface concerning working and living arrangements, including any alleged violations or misunderstanding of this section of the policy, a priest may seek the assistance of the Episcopal Vicar for Clergy and/or the local Dean, to assess and address these issues.

## **Section 3 – PERSONNEL BOARD, ASSIGNMENTS AND INCARDINATION**

### **3.1 The Diocesan Bishop**

The Diocesan Bishop alone has the sole right and responsibility for the assignment of all priests in the Diocese.<sup>9</sup> Every priest has the right to approach the Diocesan Bishop directly or through his representative (e.g., the Episcopal Vicar for Clergy) concerning his assignment.

### **3.2 The Presbyteral or Priests Personnel Board**

In exercising his responsibility to assign priests in service to the Diocese, the Diocesan Bishop will ordinarily make use of the discussion and recommendation of the Personnel Board. He may attend the meetings of the Board personally or through his delegate.

#### **3.2.1 Confidentiality**

The Personnel Board is bound to professional secrecy, and each priest's natural right<sup>10</sup> to privacy and good reputation shall be scrupulously observed. This obligation continues even after the term of office of a member of the Personnel Board expires. The obligation of confidentiality also extends to those who may be consulted as part of the work of the Personnel Board.

#### **3.2.2 Function**

The primary functions of the Personnel Board are:

- a) to meet regularly, usually monthly, to assist the Diocesan Bishop in the assignment of priests in service to the diocese;
- b) to conduct consultations (e.g., town hall meetings) as needed before making recommendations to the Diocesan Bishop;
- c) to review annually the priest personnel policies of the Diocese together with the Presbyteral Council;
- d) to identify, and propose candidates for graduate studies, in cooperation with the Episcopal Vicar for Clergy and the Director of Clergy Education.

#### **3.2.3 Composition**

The Personnel Board shall consist of eight incardinated priests, six elected by the priests, and two appointed by the Diocesan Bishop. In addition, *ex officio* members include the Auxiliary Bishop, the Vicar General, and the Episcopal Vicar for Clergy, the latter serving as Secretary to the Board.

##### **3.2.3.1 Eligibility**

All priests incardinated and resident in the Diocese are eligible to nominate, vote for and serve on the Personnel Board.

##### **3.2.3.2 Elected Members**

The six elected members shall be nominated and elected from the following constituencies, each priest being eligible to participate in two nominating groups:

- a) One priest from the senior third of the priests (by years of ordination);
- b) One priest from the middle third of the priests (by years of ordination);
- c) One priest from the junior third of the priests (by years of ordination);

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<sup>9</sup> 1983 *CIC* cc. 523, 547.

<sup>10</sup> 1983 *CIC* c. 220.

- d) One priest assigned to (or residing in) that region of the Diocese lying north of the northern boundaries of the counties of Glenn, Butte and Sierra;
- e) One priest assigned to (or residing in) that region of the Diocese lying south of the northern boundaries of the counties of Glenn, Butte and Sierra, excluding Sacramento County;
- f) One priest assigned to (or residing in) Sacramento County.

#### **3.2.3.2.1 Nomination Process**

The nomination process, which together with the elections, are conducted annually by the Parliamentarian and Vice Chair of the Presbyteral Council, shall be conducted as follows:

- a) Each eligible priest shall name three priests from his nominating group in order of preference.
- b) A first preference shall be assigned a value of three points;
- c) A second preference shall be assigned a value of two points;
- d) A third preference shall be assigned a value of one point.
- e) The two priests receiving the highest number of points shall be the nominees of that particular nominating group.

#### **3.2.3.2.2 Elections**

The Nomination and Elections shall be conducted during the months of October and November each year.

#### **3.2.3.2.3 Term**

Elected members shall assume their office on January 1<sup>st</sup> and serve for three years. While they may serve an unlimited number of terms, they shall not serve more than two terms consecutively. Terms shall be arranged so that during the course of a three-year cycle, one third of the members is elected each year:

- a) The members representing the senior and northern constituencies shall be elected in the first year of the cycle.
- b) The members representing the middle and southern constituencies shall be elected in the second year of the cycle.
- c) The member representing the junior and Sacramento constituencies shall be elected in the third year of the cycle.

#### **3.2.3.3 Appointed members**

The two appointed members are freely appointed by the Diocesan Bishop and serve at his pleasure. However, for purposes of stability, it is foreseen that they would ordinarily follow the three-year-once-renewable term of elected members.

#### **3.2.4 Chair**

The chair is appointed by the Diocesan Bishop, and is responsible for setting the agenda (in consultation with the Diocesan Bishop and the Secretary to the Board), and conducting the meetings of the board.

#### **3.2.5 Secretary**

The role of Secretary is held *ex officio* by the Episcopal Vicar for Clergy. It is the responsibility of the Secretary:

- a) to provide adequate information for the board to make informed decisions;

- b) to interview priests who have indicated a desire for a change of assignment;
- c) to interview non-incardinated priests, preferably in person, who are seeking initial assignment in the diocese;
- d) to assist in the consultation of relevant parties, including the local dean, at the time of a vacancy;
- e) to maintain current personnel data forms and parish profile forms for use by the board;
- f) to help set the meeting agenda with the chair;
- g) to assist with the self-education of the board concerning the needs of the whole diocese, including consultation with department heads, where appropriate or necessary;
- h) to be conscious of the need of all priests to receive fraternal correction and affirmation in their ministry.

### **3.3 General Policies Concerning the Assignment of Priests**

#### **3.3.1 Principles**

##### *a) Good of the Church and the Priest*

A priest is ordained to serve the People of God and should be encouraged in his ministry. Every priest must subordinate his personal preferences to the pastoral needs of the people and to the mission of the Church. He should serve where he is most needed and his assignment should be constitutive of his personal, spiritual and ministerial growth.

##### *b) Congruity in Ministry*

The best possible matching of each priest's personality, qualifications, and talents to the genuine human needs of a given situation in ministry should be strived for.

##### *c) Continuity in Ministry*

The continuing needs of and direction of a particular ministry situation should be taken into account in any change of personnel.

#### **3.3.2 Terms of Office**

Assignments shall ordinarily be made twice a year on January 1st and July 1st. Where pastoral situations warrant, the bishop will make provision in the interim until a permanent appointment is made. No assignment is official until the Diocesan Bishop or his delegate has signed the letter of appointment. All assignments are to be published in the "Official" column of the *Catholic Herald*.

##### **3.3.2.1 The Pastor**

The ordinary term of a Pastor is six years, once renewable. Exceptions may be made in individuals cases, with particular consideration given to those priests 60 years or older. In the case of the Parochial Administrator who is exercising parochial leadership in accordance with Section 1.3.1 of this policy, the time served as Parochial Administrator counts toward the six-year term.

##### **3.3.2.2 The Parochial Vicar**

The ordinary term of a Parochial Vicar is two years. However, pastoral needs may require a term to be extended or shortened by the Diocesan Bishop.

### **3.3.2.3 The Priest in Special Ministry**

The ordinary term of a priest in special ministry is five years. However, pastoral needs may require a term to be extended or shortened by the Diocesan Bishop.

### **3.3.3 Resignation for Transfer or Reassignment**

A priest is deemed to have resigned when a formal letter has been submitted to and accepted by the Diocesan Bishop. This process is to be completed before a new appointment is made. When possible, in order to provide for suitable transition, a priest seeking reassignment should provide notice to the Bishop or the Episcopal Vicar for Clergy well in advance of the time of transfer (ideally six months).

## **3.4 Specific Procedures Concerning the Assignment of Priests**

### **3.4.1 General Availability**

The Episcopal Vicar for Clergy shall contact annually, usually by written questionnaire, all priests of the Diocese, concerning their interest in remaining in or changing assignments. Priests who request a specific change (e.g., application for a pastorate) should be notified personally in a timely manner if they have not been selected for the requested change.

### **3.4.2 Vacant Pastorate**

Notice of a vacant or soon-to-be-vacant pastorate may be made to all incardinated priests. Priests interested in applying should notify the Episcopal Vicar for Clergy in writing, listing their reasons for the application. The Vicar may follow up with a conversation. Interested priests may request a summary parish profile to assist in their discernment. The applicant shall ordinarily have served in at least two assignments within the Diocese prior to seeking a pastorate. The board can consider these applications, but is not prevented from asking another priest to consider the position. The Diocesan Bishop is not limited in any way from making the final decision.

- 3.4.2.1 Insofar as is possible, a newly assigned pastor should meet with his predecessor to review on-going parish activities, personnel and any practical matters which would make for as smooth and non-disruptive a transition as is possible for staff and parishioners. The Episcopal Vicar for Clergy, or the Bishop himself, may highlight areas of discussion that may be of particular relevance or concern.

### **3.4.3 Parochial Vicars**

While a Parochial Vicar is free to request a transfer or to apply for an alternate assignment, the reality is, that an assignment as Parochial Vicar is ordinarily made due to the needs of the diocese or the parish, and in preparation for eventual service as a Pastor. Given the relatively short term of a Parochial Vicar, the Episcopal Vicar for Clergy should remain in close contact in order to evaluate the future needs of the parish and priest. Consultation with a prospective Pastor is to take place prior to the assignment of a Parochial Vicar.

### **3.4.4 Special Ministry**

An individual priest may request to be assigned to a Special Ministry. The Personnel Board may be consulted in some cases. It is the prerogative of the Diocesan Bishop to make such assignments, particularly when making appointments to his personal staff.



### **3.4.5 Newly Ordained**

Studies have demonstrated the importance of a first assignment to the successful life-long ministry of a priest. In proposing a first assignment for newly ordained priests, the ability and disposition of a Pastor who can provide mentoring and a good role model should be taken in to account. The Personnel Board is to consult with the Director of Vocations prior to making such recommendations.

### **3.4.6 Graduate Studies**

The on-going needs of the Diocese are the primary motivation for further studies. A priest may outline his desire for further studies to the Bishop or to the Episcopal Vicar for Clergy, or a priest may be asked to consider further studies by the Bishop or his delegate. In either case, the Personnel Board shall be diligent in identifying the needs of the Diocese and evaluating the fitness of a particular candidate for further studies to meet these needs.

### **3.4.7 Non-Incardinated Priests**

For purposes of this section, “non-incardinated priests” refer to those priests from other dioceses or religious communities who wish to receive an official assignment within the Diocese of Sacramento on a stable basis. It does not refer to religious priests who are presented by their superior for service in a parish or institution entrusted to their religious community, or to a priest who may be supplying on a brief temporary basis while a priest is on vacation or sabbatical.

#### **3.4.7.1 Application**

It is the responsibility of the Episcopal Vicar for Clergy to oversee the application process and make a recommendation to the Personnel Board and the Diocesan Bishop. The application is to include:

- a) Approved Letter of Good Standing.
- b) Letter of Recommendation and Permission from the applicant’s Diocesan Bishop or Major Superior.
- c) Letter of Recommendation from last immediate superior, if not the superior listed above, attesting to physical and mental health of the applicant and an evaluation of prior service.
- d) Written *Resumé / Curriculum Vitae* including: recent photograph, personal history, date and place of birth, upbringing, schools attended and degrees received, significant illnesses, special talents or skills in ministry, languages spoken and degree of fluency, recent health report (physical) from a medical doctor, and a recent psychological report demonstrating emotional and mental health.
- e) Ministerial history including when and where ordained, list of assignments, reason for transfer.
- f) Reasons for wanting to serve in the Diocese of Sacramento.
- g) Types of assignment for which he feels suited or unsuited.
- h) Proof of legal eligibility to work in the United States.
- i) A personal interview.

#### **3.4.7.2 Assignment**

The Personnel Board is not to make a recommendation for assignment until the application process has been completed. A non-incardinated priest is recommended for assignment using the same criteria as an incardinated priest, with the exception, that ordinarily, a non-incardinated

priest who is recommended to oversee a parish shall be named a Parochial Administrator rather than a Pastor. Assignments of non-incardinated priests are to be reviewed annually.

#### **3.4.7.3 Special Issues**

Non-incardinated priests for whom English is a second language, as well as foreign-born priests for whom American culture is new are to be encouraged to seek the necessary assistance in gaining proficiency in language and accent skills as well as formation in cultural understanding. The Director of Clergy Education is to actively facilitate these processes.

#### **3.4.8 Priests Seeking Assignment outside the Diocese**

Priests seeking an assignment outside the Diocese are to notify the Episcopal Vicar for Clergy together with the specifics of the assignment (description, term, financial arrangements, etc.), at least six months in advance of the proposed mission. The Vicar will present this to the Bishop and Personnel Board for evaluation. If approved, an annual report of his work is to be submitted to the Episcopal Vicar for Clergy.

### **3.5 Incardination**

#### **3.5.1 Eligibility**

Non-incardinated priests are eligible to seek incardination in the Diocese after serving a minimum of five years in the Diocese. A priest seeking incardination will be expected to have served in at least two different assignments within the Diocese, and not be older than forty years of age (the Diocesan Bishop may make an exception in an individual case). The Diocesan Bishop may not allow the incardination of a cleric unless the prescriptions of canon 269 have been observed.

#### **3.5.2 Application**

It is the responsibility of the Episcopal Vicar for Clergy to oversee the application process and make a recommendation to the Personnel Board and the Diocesan Bishop. The application is to include:

- a) Approved Letter of Good Standing.
- b) Letter of excardination and permission to seek incardination from the applicant's Diocesan Bishop or Major Superior.
- c) Letter from each of the pastors / superiors where the applicant has served within the Diocese, or from the local dean or mentoring priest, evaluating the priestly and ministerial skills of the applicant and the willingness of the evaluating priest to have the applicant as his co-worker.
- d) Letters of recommendation from three other priests of the Diocese evaluating the priestly and ministerial skills of the applicant and the willingness of the priest to be associated with the applicant in ministry.
- e) An updated written *Resumé / Curriculum Vitae* including: recent photograph, personal history, date and place of birth, upbringing, schools attended and degrees received, significant illnesses, special talents or skills in ministry, languages spoken and degree of fluency, and if not previously provided, a recent health report (physical) from a medical doctor, and a recent psychological report demonstrating emotional and mental health.
- f) Updated ministerial history including when and where ordained, list of assignments, reason for transfer.

- g) Reasons for wanting to be incardinated in the Diocese of Sacramento.
- h) Types of assignment for which he feels suited or unsuited.
- i) Proof of legal eligibility to work in the United States.
- j) A personal interview.

### **3.5.3 Special Circumstances**

Non-incardinated priests who have not sought incardination within six months after having served five years in the Diocese, as well as those who have sought incardination and been refused, will ordinarily be asked to return to their home Diocese or Religious Community. The Diocesan Bishop can make exceptions to this policy on an individual basis.

## **Section 4 – CONTINUING EDUCATION AND SPIRITUAL LIFE OF PRIESTS, ROLE OF DEANS**

### **4.1 Continuing Education**

The continuing theological, spiritual, human and pastoral formation of the priest is vital for the priest and benefits the people to whom he ministers. Priests in active ministry are encouraged to avail themselves of the many opportunities to deepen their spirituality, knowledge, imagination and professional skill. A minimum of fifty-two hours of study is required annually.<sup>11</sup> The priest's source of income will provide reimbursement up to a limit set by the Diocesan Remuneration Policy.<sup>12</sup> Among the possibilities for continuing academic and professional growth:

#### **4.1.1 Graduate Studies**

As noted previously (see section 3.4.6), the on-going needs of the diocese are the primary motivation for graduate studies. Nevertheless, priests who wish to pursue graduate studies on their own may do so, recognizing that it will have an impact on their primary pastoral duties. For this reason, permission from the Diocesan Bishop should be sought prior to beginning such studies.

#### **4.1.2 Sabbatical**

To enhance their ministry and to encourage spiritual and personal renewal, priests are encouraged to avail themselves of the opportunity to take a three-month spiritual or educational sabbatical every seven years, in accordance with diocesan policy (see APPENDIX X).<sup>13</sup> This benefit does not accumulate with time; if not utilized in a timely manner, it is forfeited.

#### **4.1.3 Extended Courses**

Priests may request permission from, or may be asked by, the Diocesan Bishop to take part in an extended educational or spiritual experience<sup>14</sup> to enhance their ministry which may take them away from their ordinary pastoral duties for a limited time. In such cases, clear provision is to be made to cover for pastoral duties.

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<sup>11</sup> 2006 Diocesan Statute 37.

<sup>12</sup> Remuneration Policy, Appendix A, 3. Reimbursements, D. Continuing Education.

<sup>13</sup> 2006 Diocesan Statute 39.

<sup>14</sup> E.g., Clinical Pastoral Education, New Pastor Workshop, Language Studies, Good Leaders Good Shepherds, etc.

#### **4.1.4 Annual Study Days**

The Diocese provides annual study days in October to address issues of common concern. These days are arranged by the Office of Clergy Formation. All active priests are expected to attend these days and to detach themselves from ordinary pastoral responsibilities during this time.

#### **4.1.5 Workshops, Conventions, etc.**

Priests are encouraged to avail themselves of periodic opportunities provided by the Office of Clergy Formation, and other entities to attend workshops, conventions, and other educational experiences which may enhance their ministry, being mindful that they do not create extensive absences from their responsibilities. The Episcopal Vicar for Clergy is to be advised when a priest is availing himself of such opportunities, and who is providing coverage; and may intervene if abuses occur.

#### **4.1.6 Personal Study**

In addition to the opportunities presented above, priests are encouraged to keep abreast of current affairs, magisterial teaching and theological reflection through books, periodicals and other means of social communication. A priest's continuing education allowance may be used for this purpose in accordance with diocesan policy.<sup>15</sup>

### **4.2 Spiritual Life of Priests**

A healthy spiritual life is essential and integral to the life and ministry of a priest. The following elements are part of the fabric of priestly life:

#### **4.2.1 Annual Retreat**

All diocesan priests are expected to attend the annual group retreat provided by the Office of Clergy Formation. A priest is not to miss the group retreat two years in succession, but may substitute it in a given year<sup>16</sup>, with due notice given to the Episcopal Vicar for Clergy. To participate fully in the retreat experience, it is expected that the priest detach himself from ordinary pastoral responsibilities during the week, having provided for pastoral emergencies in consultation with the other priests of the deanery or area.

#### **4.2.2 Eucharist**

The celebration of the Eucharist being at the heart of priestly ministry, daily celebration of the Eucharistic sacrifice is recommended earnestly, even if the faithful cannot be present.<sup>17</sup>

#### **4.2.3 Penance and Reconciliation**

Mindful of his need for continuing conversion and spiritual growth, a priest should avail himself regularly of the sacrament of penance and reconciliation.

#### **4.2.4 Liturgy of the Hours**

Consistent with the promises made at ordination, a priest is reminded of his obligation to pray the full sequence of the Liturgy of the Hours daily and at the proper time.<sup>18</sup>

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<sup>15</sup> Remuneration Policy, Section 3, D; Schedule B, 10.

<sup>16</sup> 2006 Diocesan Statute 36. The annual retreat cannot be substituted by an "individual" or "personal" retreat, which simply resembles a vacation; there must be some structure or direction provided, and notice given to the Episcopal Vicar for Clergy.

<sup>17</sup> 1983 *CIC*, c. 904. See also GIRM, 3<sup>rd</sup> ed., no. 254: "Mass should not be celebrated without a minister or at least one of the faithful, except for a just and reasonable cause."

<sup>18</sup> 1983 *CIC*, cc. 276, §2, 3°; 1174, §1 and 1175; GILH, no. 29.

#### **4.2.5 Spiritual Director and Support Groups**

Priests are encouraged to make use of a spiritual director and to take part in fraternal support groups to help maintain a balanced and healthy lifestyle.

#### **4.2.6 Personal Prayer**

Priests are encouraged to take time for daily personal prayer, which may include spending time before the Blessed Sacrament, *lectio divina*, praying the rosary, offering devotional prayers, etc.

#### **4.3 Role of the Dean (Vicar Forane)**

The primary roles of the Dean (or Vicar Forane), are 1) to promote and coordinate common pastoral ministry in a given area (the deanery), and 2) to serve as the representative of the Diocesan Bishop in providing support and care to the priests of the deanery.<sup>19</sup> The latter function is ordinarily done in collaboration with the Episcopal Vicar for Clergy. For this ministry to be carried out effectively, it is essential that the Dean meet regularly with the other priests in his deanery and reach out to those who do not attend the regularly scheduled meetings of the group. The specific responsibilities of the Dean are enumerated by diocesan policy (see APPENDIX XI).

### **Section 5 – REMUNERATION AND BENEFITS, PASTORAL CARE FOR SPECIAL ISSUES, LEAVES OF ABSENCE**

#### **5.1 Remuneration and Benefits**

The relationship that exists between the Diocesan Bishop and his incardinated priests gives rise to the obligation of the part of the Diocesan Bishop to provide for the decent support and social assistance of his priests according to the norm of law.<sup>20</sup> This basic care is often referred to as sustenance. In addition, a priest who is engaged in active ministry has the right to appropriate remuneration for his ministry in order to provide for the necessities of life, the payment of those whose services they require, retirement and charitable assistance.<sup>21</sup>

##### **5.1.1 Simplicity of Lifestyle**

While clerics are entitled to decent support, they should foster simplicity of life and refrain from any semblance of vanity.<sup>22</sup>

##### **5.1.2 Sustenance**

For purposes of this policy, sustenance is defined as room and board, healthcare, and simple living expenses (clothing, toiletries, etc.).

##### **5.1.3 Remuneration of Active Incardinated Priests**

The Diocese shall maintain a schedule of *Remuneration of Priests in Active Ministry* that is to address 1) Compensation, 2) Benefits, 3) Reimbursements, and 4) Entitlements. This schedule shall be reviewed annually by the Finance Department for cost-of-living adjustment, and no less

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<sup>19</sup> 1983 *CIC* cc. 553-555.

<sup>20</sup> 1983 *CIC* c. 384.

<sup>21</sup> 1983 *CIC* cc. 281, §1-2; 282, §2.

<sup>22</sup> 1983 *CIC* c. 282, §1.

than every three years by the Priestly Life Committee (or an *ad hoc* committee established for this purpose by the Episcopal Vicar for Clergy) for recommended amendments to the Diocesan Bishop, who maintains ultimate responsibility for the policy. The current schedule is to be attached as an appendix to this policy (see APPENDIX VIII).

#### **5.1.4 Support of Inactive Incardinated Priests**

The Diocese shall maintain a *Policy for the Support of Incardinated Priests who are Inactive but not yet Retired*. This policy is to distinguish between those obligations that arise from incardination and those that arise due to engagement in active ministry. The current policy is to be attached as an appendix to this policy (see APPENDIX XII).

#### **5.1.5 Support of Retired Incardinated Priests**

The support of retired incardinated priests is addressed in Section 6 of this policy.

#### **5.1.6 Extern and Religious Priests Serving in the Diocese**

Priests who are not incardinated in the Diocese of Sacramento, whether extern secular or religious priests, and who are given a diocesan assignment are entitled to remuneration at a rate equivalent to that of an incardinated priest while they enjoy a diocesan assignment. No obligation of support by the Bishop of Sacramento other than what may be earned as part of a vested pension arises from this assignment, beyond what is earned as part of the active assignment. Such priests remain the obligation of their own bishop or religious community. Care is to be taken that remuneration of religious priests who have taken a vow of poverty be made according the norms of the particular congregation. In such cases, under ordinary circumstances, a contract between the Diocesan Bishop and the religious superior should govern the relationship.

### **5.2 Pastoral Care for Special Issues**

For a variety of reasons, most notably the spiritual, mental or physical health of the priest, the Diocesan Bishop may approve or even require that an individual priest seek professional assistance for a particular issue. It is understood that such care is for the good not only of the individual priest, but also the wider community whom he serves. The care may be provided in an outpatient or residential setting. In either case, the Episcopal Vicar for Clergy is responsible for meeting with the priest ahead of time to discuss the practical arrangements of the care, including, though not limited to, financial provisions, coverage or supply during any period of absence, as well as the terms of any follow-up. In such cases, as a matter of canon and civil law,<sup>23</sup> the priest has a right to confidentiality. Without his expressed permission, diocesan officials shall limit any comments on the matter to an acknowledgement that the individual priest may be on leave or limited ministry for reasons of a personal nature.

### **5.3 Leaves of Absence**

A leave of absence from ministry may be authorized or unauthorized.

#### **5.3.1 Authorized Leave of Absence**

An authorized leave of absence may be granted for a just cause with the prior permission of the Diocesan Bishop and may or may not be termed as Administrative, Medical, Military, Personal, or Professional Leave. An authorized leave may be granted for a variety of legitimate reasons

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<sup>23</sup> 1983 *CIC* c. 220; Health Insurance Portability and Accountability Act of 1996 (Public Law 104-191), often referred to as “HIPAA.”

and should not be the cause of undue or uncharitable speculation. It is the responsibility of the Episcopal Vicar for Clergy to meet with the individual priest as soon as possible prior to the leave to determine:

- a) the length of the absence,
- b) coverage or supply during the absence,
- c) the sustenance, remuneration or benefits to be supplied during the absence,
- d) the manner of maintaining contact with the Vicar for Clergy (particularly during an extended leave);
- e) any restrictions on public ministry,
- f) terms for resuming public ministry, and
- g) any other practical details that may be appropriate.

The terms of the leave are to be put in writing and signed by the priest and the vicar.

### **5.3.2 Unauthorized Leave of Absence**

An unauthorized leave of absence may result in an immediate withdrawal of priestly faculties and suspension of all remuneration and benefits, including sustenance.

## **Section 6 – RETIREMENT AND END OF LIFE ISSUES**

### **6.1 Retirement**

A priest is a priest forever. Every priest is encouraged to remain as active in ministry as he is able.<sup>24</sup> Nevertheless, age or health may require or motivate a priest to request retirement from full-time active ministry, and/or administrative responsibilities.

#### **6.1.1 Eligibility**

Incardinated priests may retire at age sixty-five. Requests for retirement before the age of seventy-five should normally be made at least six months prior to the requested date of retirement.<sup>25</sup>

#### **6.1.2 Mandatory Retirement**

Priests assigned to an administrative position (e.g., pastor) must submit their letter of resignation six months prior to their seventy-fifth birthday.<sup>26</sup>

#### **6.1.3 Consultation**

The Diocesan Bishop or his delegate will meet with every priest approximately one year before their date of eligibility and/or mandatory retirement to discuss future ministry options. These options include:

- a) The Diocesan Bishop may encourage the priest to remain in his current assignment, particularly if the priest has not yet reached the age of seventy and is in good health,<sup>27</sup>
- b) The Diocesan Bishop may encourage the priest to accept a different assignment (e.g., one without administrative responsibilities);

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<sup>24</sup> 2006 Diocesan Statute 48.

<sup>25</sup> Ibid.

<sup>26</sup> 1983 *CIC* c. 538, §2.

<sup>27</sup> According to the Social Security Administration, the full retirement age increases incrementally from 65 for those born prior to 1938 to 67 for those born in 1960 or later.

- c) The Priest may initiate a proposal for an assignment for himself (e.g., as a parochial vicar or priest in residence in a parish other than the one he has retired from as pastor);
- d) The Priest may reside in diocesan or private housing, offering his services to a parish or other institution, as he is able and willing.

Assignments remain the prerogative of the Diocesan Bishop. A priest ordinarily is not to reside in the rectory of the parish from which he retires as a pastor.

#### **6.1.4 Review**

The Episcopal Vicar for Clergy is to communicate annually with each retired priest to review his willingness and ability to participate in senior ministry, based on the options presented in section 6.1.3.

#### **6.1.5 Assistance**

The Office of the Episcopal Vicar for Clergy shall provide an orientation for those preparing for retirement to review the options, challenges, responsibilities and benefits of retirement. The same office shall also provide assistance and an assessment of needs to those who are experiencing the effects of ill-health or advanced age.

#### **6.1.6 Financial Responsibility**

While the Diocesan Bishop remains responsible for the sustenance of retired incardinated priests, he does so ordinarily through a) the provision of a pension earned through active ministry, b) a salary during active ministry that provides the means for personal savings, and c) the benefits provided by the state (e.g., Social Security and Medicare).

##### **6.1.6.1 Remote Preparation for Retirement**

In light of the provisions noted above, all priests are to ensure that they are setting aside part of their salary for retirement, and that they are properly registered and paying into the Social Security system. The Office of Clergy Education is to provide periodic educational opportunities on personal investment and retirement planning.

##### **6.1.6.2 Diocesan Assistance**

Residential and convalescent care in retirement is the responsibility of the individual priest. Diocesan funds may subsidize this care only when a priest's individual resources have been exhausted.

#### **6.1.7 Communication**

Retired priests are to regularly receive diocesan communications, and be welcomed at deanery meetings and priestly and diocesan activities (e.g., retreats, study days, workshops, etc.).

### **6.2 End of Life Issues**

All incardinated priests are requested to have the following on file with the Episcopal Vicar for Clergy. An advanced health care directive or living will, which designates who is to make health care decisions for the priest in the case of his incapacity;

- a) Durable power of attorney;
- b) A last will and testament, or at least its location;
- c) Funeral arrangements.



All items are to remain sealed in a confidential file until needed. However, the Episcopal Vicar for Clergy may review the advanced health care directive and funeral arrangements with the individual priest to ensure accordance with Church norms prior to sealing.

### **6.3 Funeral**

The Episcopal Vicar for Clergy is responsible for coordinating the priest's funeral, providing appropriate notification of the priest's death, and an obituary, together with the priest's family and executor. Funeral arrangements are to be in keeping with the Church's liturgical norms.

### **6.4 Cemetery**

A priest is free to choose where he is to be buried. However, burial arrangements should reflect the Church's law and liturgical norms. The diocesan funeral and cemeteries service may provide benefits to a priest and his family, a current summary of which is attached in the appendix (see APPENDIX XIII).

## **Section 7 – REVIEW AND AMENDMENTS**

### **7.1 Review**

This policy shall be reviewed annually at the joint meeting of the Presbyteral Council and the Personnel Board.

### **7.2 Amendments**

Amendments to this policy may be suggested by any member of the Presbyterate, either personally or through a representative on the Presbyteral Council. However, prior to making a recommendation to the Diocesan Bishop to amend the policy, the Presbyteral Council is to ensure that proposed changes are circulated among the entire Presbyterate for comment. It remains the prerogative of the Diocesan Bishop to make any amendments to this policy with or without counsel.

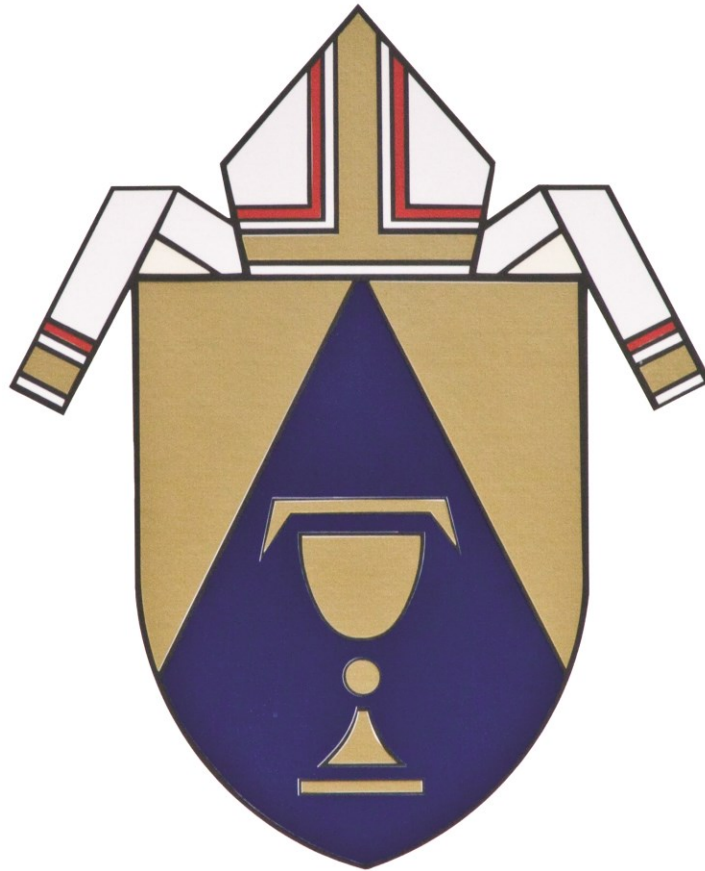
## **APPENDIX**

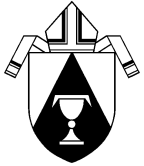
- I. OUTLINE OF A MEMORANDUM OF UNDERSTANDING BETWEEN A PASTOR AND PAROCHIAL VICAR
- II. GUIDELINES FOR THE APPOINTMENT OF A PARISH STEWARD
- III. PAROCHIAL VICAR ANNUAL EVALUATION
- IV. INSTRUMENT FOR EVALUATING A PAROCHIAL ADMINISTRATOR
- V. INSTRUMENT FOR EVALUATING A PASTOR
- VI. CODE OF PASTORAL CONDUCT
- VII. SEXUAL MISCONDUCT POLICY
- VIII. REMUNERATION OF PRIESTS IN ACTIVE MINISTRY
- IX. RECTORY INSPECTION CHECKLIST
- X. SABBATICAL GUIDELINES
- XI. DIOCESAN DIRECTIVES CONCERNING THE OFFICE OF DEAN OR VICAR FORANE
- XII. POLICY FOR THE SUPPORT OF INCARDINATED PRIESTS WHO ARE INACTIVE BUT NOT YET RETIRED
- XIII. FUNERAL AND CEMETERY BENEFITS FOR PRIESTS

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# APPENDIX I

## OUTLINE OF A MEMORANDUM OF UNDERSTANDING BETWEEN A PASTOR AND PAROCHIAL VICAR





## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-200 • Fax 916/733-0215

### **Outline of a Memorandum of Understanding Between a Pastor and Parochial Vicar (see Diocesan Statute, no. 64)**

Father \_\_\_\_\_ (name of Parochial Vicar) and myself, Father  
\_\_\_\_\_ (name of Pastor) met on the \_\_\_\_\_ day of the month of  
\_\_\_\_\_ in the year \_\_\_\_\_. We discussed the following responsibilities that each  
of us will carry out individually and together, in order to serve the needs of the parish and have  
developed a written description of our respective roles and expectations, including the following  
areas and items<sup>28</sup>:

- ☐ Areas in which the Pastor and the Parochial Vicar share responsibility
- ☐ Areas for which the Pastor alone is responsible
- ☐ Areas in which the Parochial Vicar is principally responsible
- ☐ Description of Duties of Parochial Vicar (see attached)
- ☐ Areas of Pastoral Responsibilities outside of the parish
- ☐ Expectations of each priest
- ☐ Schedule of monthly (or weekly) meeting
- ☐ Compensation, benefits and remuneration schedule

Signed \_\_\_\_\_

Name of Pastor: \_\_\_\_\_

Signed: \_\_\_\_\_

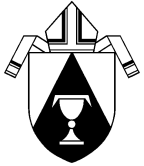
Name of Parochial Vicar: \_\_\_\_\_

Signed: \_\_\_\_\_

Name of Episcopal Vicar for Clergy: \_\_\_\_\_

Reviewed on: \_\_\_\_\_

<sup>28</sup> The signed agreement along with the written description of respective roles and expectations should be photocopied for the parish records and the original documents sent to the Episcopal Vicar for Clergy.



## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-200 • Fax 916/733-0215

### **Description of Duties of Parochial Vicar**

The role of the Parochial Vicar (P.V.) is one of collaborator and assistant to the pastor. Together they are assigned by the Bishop to fulfill the mission of the parish, to teach, to preach and to sanctify. The P.V. is also in the unique position of learning how to manage a parish with the expectation that he will be managing a parish on his own.

To help fulfill his mission, the following is a list of tasks that will enable the P.V. to teach, to preach and to sanctify, as well as learn the temporalities of modern parish life.

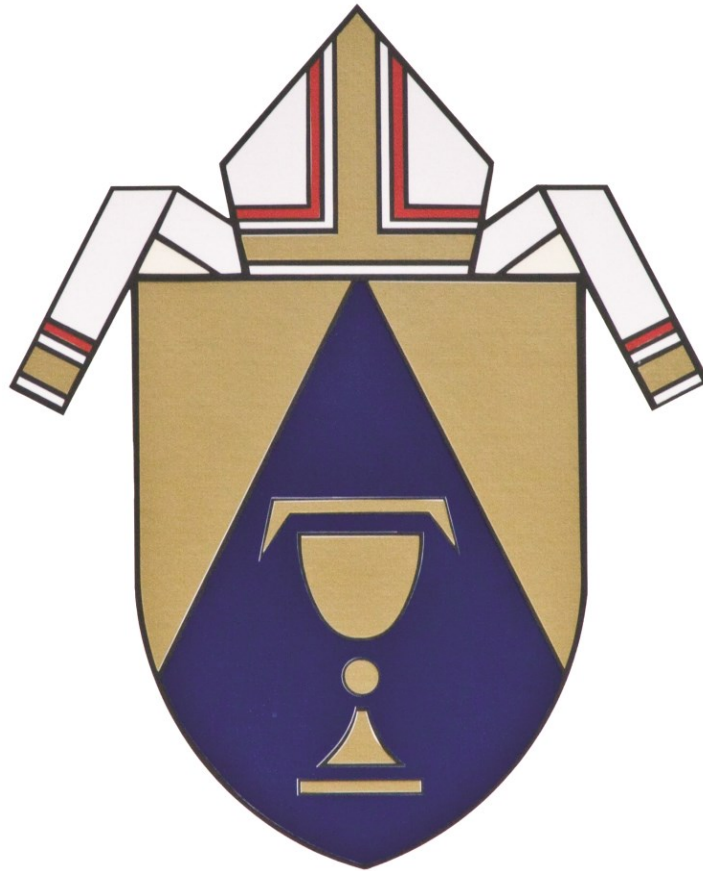
- 1) On Sundays, the P.V. is required to greet the people who have gathered to celebrate the mass, even on the masses that he does not preside at, whenever possible.
- 2) The P.V. will be required to attend the youth group, involved in the leadership of the group, supporting them as a spiritual director and attending meetings every week (except in emergency or rare occasions).
- 3) The P.V. will be required to attend the young adult group, involved in the leadership of the group, supporting them as a spiritual director and attending scheduled meetings (except in emergency or rare occasions).
- 4) The P.V. is required to participate in the Religious Education program in the parish, teachings as agreed to with the Director of Religious Education or simply participating through his presence in the various classes every week.
- 5) The P.V. is required to participate with the R.C.I.A. team to help teach and to be present to the candidates and catechumens.
- 6) The P.V. is required to attend at least one meeting a quarter of all the various groups and ministries that support the work of the parish.
- 7) The P.V. is required to participate in the scheduled Parish Pastoral Council, Parish Finance Council, Staff meetings and Stewardship Meetings. The P.V. will notify the pastor of emergencies that prevent his attendance.
- 8) The P.V. is required to be actively involved where possible in the baptismal and marriage preparation programs, and attending the rehearsals.
- 9) The P.V. is required to schedule the presiders, to train new ministers, to oversee those who bring communion to the sick and shut-ins, and to schedule the rest home Masses.
- 10) The P.V. is required to be available for office appointments and when not in conflict with previously scheduled appointments, he will be available for those who come without an appointment.
- 11) The P.V. and pastor will coordinate their day off (24 hours), vacation schedule (under 60, 4 weeks, over 60, 6 weeks) and other time off, so that the pastoral care of the parish is not lacking.
- 12) The P.V. and pastor will meet formally (in the office) once a month to review this job description.

## **APPENDIX I**

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# APPENDIX II

## GUIDELINES FOR THE APPOINTMENT OF A PARISH STEWARD



## PREAMBLE

The Second Vatican Council's Dogmatic Constitution on the Church, *Lumen Gentium*, gives a good theological rationale for the further growth and development of lay ministry and for the placing of it in context in the life of the Church. The preferred image of the Church for the Council is the new People of God, and the classic text is 1 Peter 2:9-10. The whole Church glories in the description of "*a chosen race, a royal priesthood, a holy nation...*" This decree further specifies that through Baptism and Confirmation, the lay apostolate is a participation in the saving mission of the Church itself.

In the same section the Dogmatic Constitution goes on to say, "...the laity, however, are given this special vocation: to make the Church present and fruitful in those places and circumstances where it is only through them that she can become the salt of the earth. Thus, every lay person, through those gifts given to him, is at once the witness and living instrument of the mission of the Church itself "according to the measure of Christ's bestowal" (Eph. 4:7).<sup>2</sup>

"Besides this apostolate which belongs to absolutely every Christian, the laity can be called in different ways to more immediate cooperation in the apostolate of the hierarchy... They have, moreover, the capacity of being appointed by the hierarchy to some ecclesiastical office with a view to a spiritual end."<sup>3</sup>

The Dogmatic Constitution sets the context of this its teaching a little earlier in the document in sections 30 and 31, where it declares: "Because of their situation and mission, however, certain things pertain particularly to the laity, both men and women,... Their secular character is proper and peculiar to the laity... by reason of their special vocation it belongs to the laity to seek the Kingdom of God by engaging in temporal affairs and directing them according to God's will. They live in the world... There they are called by God that, being led by the spirit of the Gospel they may contribute to the sanctification of the world, as from within like leaven, by fulfilling their own particular duties... it pertains to them in a special way so to illuminate and order all temporal things with which they are so closely associated that these may be effected and grow according to Christ..."<sup>4</sup>

The capacity for service in the diverse ministries that build up the Church derive from Baptism and Confirmation: "*according to the measure of Christ's bestowal*" and that "*laity have the capacity to be deputed by the hierarchy to exercise certain Church functions for a spiritual purpose.*"<sup>5</sup>

Ministries in today's Church do not have to find exact equivalents in the history of the New Testament to justify their existence and legitimize their exercise. The Spirit continues to reveal through "the signs of the times"<sup>6</sup> where the mission of the Church is best served and directed. We see "*the unmistakable work of the Holy Spirit in moving the laity today to a deeper and deeper awareness of their own responsibility and urging them on everywhere to serve Christ and the Church.*"<sup>7</sup>

As the Diocese of Sacramento approaches the beginning of the twenty-first century, the staffing of parishes and the distribution of personnel is a growing challenge. The Church must do all it can to proclaim the central message of hope and provide for the life of the parish as a communion. It is the responsibility of all within the Church community to see to it that our faith is passed on to the coming generations.

As the Catholic population of the Diocese of Sacramento continues to grow and as the number of priests available to fulfill the role of pastor becomes inadequate, it may become necessary for the Diocesan Bishop to appoint persons who are not ordained priests to "*participate in the exercise of pastoral care under the*

## APPENDIX II



*supervision of a priest endowed with the powers and faculties of a pastor.”<sup>8</sup>* The person who serves in this position is called a **Parish Steward**.

A Parish Steward is appointed by the Diocesan Bishop, supervised by a Supervising Priest and entrusted with a participation in the pastoral care of a parish in collaboration with a priest (and deacon) who may be assigned by the Diocesan Bishop to provide for the sacramental life of the parish.

This policy would apply in the situation in which a pastorate has become vacant even temporarily or when the pastor is prevented from exercising this pastoral office in the parish due to any of the causes mentioned in Canon 539 or others as determined by the Diocesan Bishop, e.g., sabbatical.

## **SECTION I**

### **APPOINTMENTS GREATER THAN SIX MONTHS IN LENGTH**

#### **I PERSONS WHO MAY BE APPOINTED**

Those who may be appointed by the Diocesan Bishop to serve as Parish Stewards are deacons, religious sisters and brothers or lay persons.

The Secretary to the Priests’ Personnel Board shall maintain a list of those persons approved by the Diocesan Bishop to assume the role of Parish Steward. The Office of the Bishop shall obtain information from pastors, the Priests’ Personnel Board and officials of Religious Congregations and shall use other means to identify persons meeting the qualifications. A periodic recruitment process may be used to aid in the creation of the list of qualified persons. Every effort will be made to match available persons with the needs of the parish.

When a position of Parish Steward becomes available, the Priests’ Personnel Board will consult with appropriate parish personnel and then, in consultation with the appropriate diocesan office, e.g. Permanent Diaconate Office, Vicar for Religious, Lay Personnel Office, will recommend to the Diocesan Bishop a list of at least two candidates for the position.

#### **II APPOINTMENT**

A Parish Steward may be appointed by the Diocesan Bishop for a period of up to 3 years. At the discretion of the Diocesan Bishop, the appointment may be renewed.

The Parish Steward is accountable to the Diocesan Bishop through a Supervising Priest. The Supervising Priest is appointed by the Diocesan Bishop, in accordance with Canon 517.2, to fulfill the role of support, encouragement and supervision of the Parish Steward.

If the Supervising Priest has been released of the responsibility of providing sacramental services to the parish by the Diocesan Bishop, another priest shall be appointed by him to do so. This appointment could change from time to time as the needs of the diocese change. Several priests and/or deacons could share this role on a rotating basis.

### **III RESPONSIBILITIES OF A PARISH STEWARD**

#### **Ministry of Leadership**

In collaboration with the Supervising Priest, the Parish Steward works with the Parish Pastoral Council, the Parish Finance Council and other committees of the parish in the same relationship as does a pastor.

#### **Ministry of Worship and Spirituality**

The Parish Steward leads the Worshiping community in the following ways:

1. Schedules and coordinates the celebration of Mass and other sacraments in Cooperation with the priests and/or deacons appointed from outside the parish to provide sacramental services;
2. in general, coordinates the sacramental life of the parish;
3. Administers Baptism in emergencies when no priest or deacon is available;
4. Serves as an extraordinary minister of the Eucharist and Viaticum;
5. Leads weekday liturgies of the Hours and/or of the Word with Communion, with due regard for norms that may be enacted by the Diocesan Bishop;
6. Conducts wake services, Liturgy of the Word and Final Commendation, according to the Order of Christian Funerals when necessary;
7. Assists families with funeral arrangements;
8. Provides for implementation of the Order of Christian initiation into the Church, for sacramental preparation, for pastoral care of the sick and dying;
9. Provides for spiritual direction;
10. Promotes family life;
11. Schedules liturgical ministers.

#### **Ministry of Evangelization and Education**

The Parish Steward leads the Evangelizing community in the following ways:

1. Plans for and coordinates programs of religious education for all ages;
2. Provides leadership and vision for the continuing formation and education of adults, (eg. Bible sharing and small Christian communities);
3. Coordinates the full range of evangelization efforts and programs;

4. Promotes social justice awareness and activity within the parish and local community;
5. Ensures that all educational programs are in conformity with the Catechism of the Catholic Church;
6. Provides for the training of teachers and parents.

### **Ministry of Spiritual and Corporal Works of Mercy**

The Parish Steward leads the Servant community in the following ways:

1. Invites people to reach out to all in need through family ministry, social action, social justice, bereavement assistance, and mutual care within the community, including assistance to the poor, the homeless and those who are physically, emotionally or spiritually needy;
2. Promotes unity in the parish, especially among the various ethnic elements of the parish, while recognizing the special gifts and needs each brings to the parish;
3. Provides for the care of those in special need at significant moments in their lives through pastoral presence, (e.g. weddings, sickness, death and tragedies).

### **Ministry of Community Building and Leadership Development**

The Parish Steward leads the Apostolic community in the following ways:

1. Promotes participation by parishioners in parish life, and in evangelization and outreach efforts;
2. Implements the mission of the parish community to all age groups. This can be assisted by comprehensive planning, implementation and evaluation of parish programs and goals and objectives in collaboration with the Supervising Priest;
3. Provides for the formation and training of lay leaders in all areas of parish life;
4. Enables the Parish Pastoral Council to function effectively.

### **Ministry of Administration**

The Parish Steward leads the Servant community in the following ways:

1. Promptly makes the entries required by Canon 535 in the sacramental and other registers of the parish;
2. Implements the Diocesan Guidelines for Parish Pastoral Councils;
3. Appoints members of the Parish Finance Council;
4. Assumes responsibility for all financial record keeping;
5. Recruits, supervises and evaluates all employees and volunteers.

6. Provides support and development to employees and volunteers;
7. Collaborates with individual staff members to develop an annual work plan consistent with the pastoral plan and budget of the parish;
8. Oversees the maintenance of all buildings, grounds and plant operations;
9. Develops a capital and operational budget including work plan for parish facilities and operations;
10. Keeps Parish Finance Council informed on progress of major capital projects.

### **Ministerial Duty to Grow in Knowledge and Skill**

The Parish Steward maintains a level of knowledge and skills necessary to serve in this ministry:

1. By participating in regional and diocesan meetings, programs and projects offered by the Diocese;
2. By attending workshops and classes;
3. By personal study and reading;
4. By making an annual retreat.

## **IV THE PRESENCE OF THE PARISH STEWARD AT PARISH LITURGIES**

It is important for the Parish Steward to attend and participate actively at parish worship since (s)he is the one providing for pastoral care in the daily life of the faith community. The Parish Steward is to maintain an active and involved presence at each Sunday celebration of the Eucharist. A Parish Steward who is a deacon may exercise the liturgical roles appropriate to deacons, and a lay person may exercise those roles appropriate to lay persons. (See appendix 1.)

## **V QUALIFICATIONS FOR PARISH STEWARDS**

Persons to be considered for appointment as Parish Stewards should possess the following qualifications:

### **A. Professional Qualifications**

1. A masters degree or its equivalent in pastoral ministry, theology, scripture, liturgy. or a closely related field of religious study;
2. Experience of three or more years in some phase of parish ministry (e.g., sacramental preparation, OCIA, catechesis, liturgy, spiritual direction, pastoral counseling);
3. Broad familiarity with liturgy, scripture, theology, both dogmatic and moral; social justice, Spiritual direction, pastoral counseling, team ministry, canon law and tribunal processes, leadership development, administration, including budgeting and finance.

## **B. Personal Qualifications**

1. A prayerful person who allots adequate time for prayer, reflection and spiritual exercises;
2. A well-balanced person, both socially and emotionally, who is able to communicate and to delegate effectively, and is imbued with the spirit of Gospel service;
3. A faith-filled person open to the Holy Spirit, committed to on-going personal growth, education and pursuit of holiness;
4. A person with the ability to work collaboratively with staff and parishioners;
5. A person who understands the role of policies and regulations in a diocese, especially with regard to personnel and finances;
6. A person who can relate to ethnic groups present in the parish, and provide for ministry to them.

## **C. Consideration may be given to applicants who have each of the following professional qualifications**

1. A bachelors degree in a field related parish ministry;
2. Experience of three or more years in some phase of parish ministry;
3. Background in aspects of pastoral administration and a willingness to augment one's basic education and develop new skills.

## **D. By way of exception**

1. (i) An educationally qualified applicant who lacks practical experience may be given a probationary appointment. Such a person will be asked to complete a one-year supervised internship as a pre-requisite to an ordinary appointment.  
  
(ii) In these cases, a written agreement is to be drawn up between the diocese and such an applicant, which, among other things, expressly and accurately defines what is expected of the applicant, how the supervision will be accomplished and what specific goals and objectives are to be attained in order to qualify for ordinary appointment.
2. An ordinary appointment by the Diocesan Bishop would follow the successful completion of the probationary internship.

## **VI CONSULTATION AND FACILITATION**

In fulfilling his responsibility to supervise the pastoral care of the parish, the Supervising Priest “enjoys all the powers and faculties of pastor, including the ordinary faculty to officiate at marriage...He is not the canonical equivalent of a pastor and, while he has the powers and faculties of a pastor, he does not assume the canonical rights and obligations of a pastor.”<sup>9</sup>

The Supervising Priest may be the local dean, the neighboring pastor or a priest serving in diocesan ministry. Ordinarily, he would not reside at the parish but would be responsible for celebrating the Eucharist and administering other sacraments. The term of Office of the Supervising Priest is determined by the Diocesan Bishop.

## **VII COMPENSATION**

A compensation policy for the assignment of a Parish Steward shall be as follows:

- A. The compensation shall be in accord with the diocesan salary schedule established for this position. The stated salary shall be exclusive of a housing allowance. If the person appointed is unable to reside in the parish residence, an appropriate off-site housing allowance will be determined at the time of appointment. All regular diocesan benefits shall apply to this position. The Parish Steward shall be expected to give the same amount of time each week to the parish as a pastor. The exact amount of time absent from the parish shall be worked out with the Supervising Priest in consultation with the Office of the Bishop. (S)he shall be given four weeks annual vacation. The days which (S)he spends once a year in Spiritual retreat are not counted as vacation days; (Please see Appendix 2.)
- B. The Parish Steward shall receive mileage reimbursement at the standard diocesan rate for use of his/her private automobile on parish business.

## **VIII PARTICIPATION IN MEETINGS AND ACTIVITIES**

The Parish Steward shall be invited by the Diocesan Bishop, the local dean, and diocesan department directors, to participate in all meetings, activities and discussions appropriate to his/her responsibilities as a Parish Steward. The support and encouragement especially of the dean and priests of the area should be considered a key factor to the success of the Parish Steward.

## **IX TRANSITION PERIOD**

Ideally, an appointment of a Parish Steward should be made before the departure from the parish of the previous pastor, parochial administrator or parish steward to allow for a period of transition and introduction of the new person to the particular customs, traditions, leadership persons and specific needs of the parish.

## **X RESPONSIBILITIES OF THE DIOCESE TO THE PARISH STEWARD**

The Diocesan Bishop or his Vicar shall consult with the Parish Steward and the Supervising Priest in all those issues dealing with the life and ministry of the parish community in which he would ordinarily consult with a pastor. Diocesan department directors and the dean shall be ready to lend assistance to the Parish Steward before the parish makes major decisions which would significantly impact the life of the parish community.

## **SECTION II**

### **INTERIM APPOINTMENTS LESS THAN SIX MONTHS IN LENGTH**

#### **I APPOINTMENT**

A Parish Steward may be appointed by the Diocesan Bishop on an interim or temporary basis:

- when a pastorate is vacant due to the resignation, retirement, or death of the pastor;
- when the pastor is prevented from exercising his pastoral office due to any of the causes mentioned in Canon 539 or other cause as determined by the Diocesan Bishop, e.g. sabbatical.

#### **II PERSONS WHO MAY BE APPOINTED**

Without prejudice to the provisions of Canons 589 and 540 (Parochial Administrator), the Diocesan Bishop may appoint an interim Parish Steward who may be a deacon, religious sister/ brother, or a lay person, on a temporary basis.

#### **III NEW PROGRAMS AND ACTIVITIES**

Since the appointment is temporary, the interim Parish Steward shall not implement any major changes in parish programs, personnel, finances or organization.<sup>10</sup> If such seems necessary, the proposed changes or new programs shall be referred to the Office of the Diocesan Bishop for evaluation and authorization.

#### **IV FILLING PARISH PERSONNEL VACANCIES**

In the event a vacancy occurs in an existing parish staff position during the interim appointment, that position shall remain vacant until the appointment of a pastor or until the incumbent pastor returns to his pastorate. If the position is key to continuing parish life, such a vacancy shall be filled on a temporary and interim basis with no guarantee of permanent employment and subject to approval by the Office of Lay Personnel. This process shall be documented.

#### **V CONSULTATION**

1. The Interim Parish Steward is to consult with the local dean or the Office of the Diocesan Bishop regarding questions of pastoral practice.
2. The Interim Parish Steward should meet with the local dean following the appointment. The dean shall be assisted as needed by the Office of the Diocesan Bishop or other appropriate diocesan department personnel.

## **VI REPORTING**

On completion of the interim assignment, the interim Parish Steward shall prepare a written summary report for the pastor about parish programs, finances, personnel, and pastoral needs during the period of the interim appointment. A copy of the report shall be submitted to the Vicar General. All parish record books shall be handed over to the pastor in complete and updated order.

## **VII COMPLETION OF APPOINTMENT**

The appointment of the interim Parish Steward shall cease on the effective date of the episcopal appointment of the new pastor or on the day an impeded or absent pastor reassumes his duties definitively.

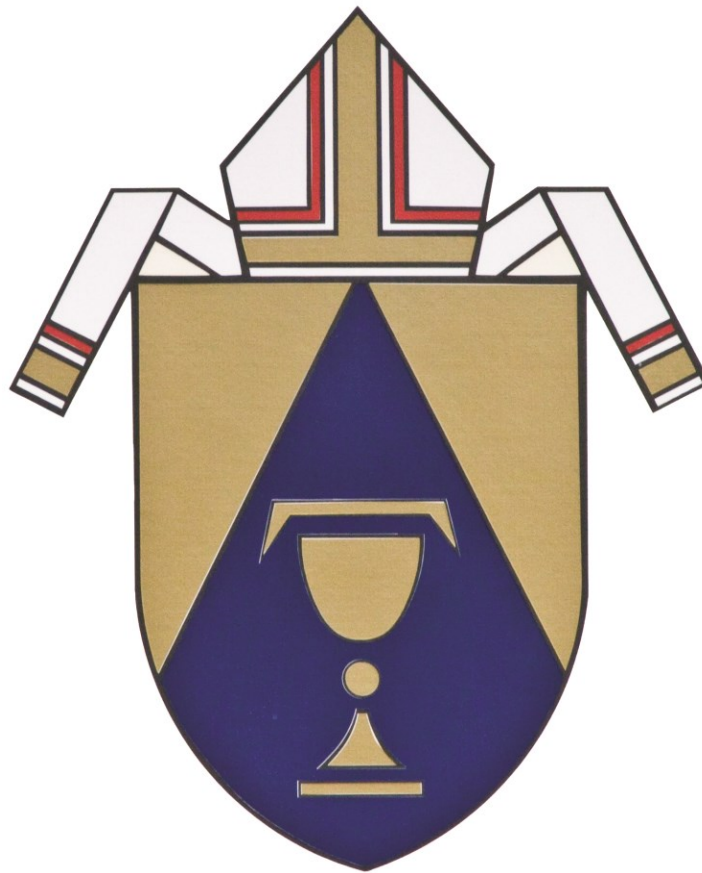
### **NOTES**

1. Lumen Gentium #9.3
2. Lumen Gentium #33
3. Ibid #33
4. Lumen Gentium #30, 31
5. Lumen Gentium #33
6. Gaudium et Spes #1.4
7. Apostolicam Actuositatem #1
8. Cf. C.517.2
9. Barbara Anne Cusaok and Therese G. Sullivan, S.P., Pastoral Care in Parishes Without a Pastor, (Washington, D. C., Canon Law Society of America) Page 7
10. Canon 540.2 “A parochial administrator is not permitted to do anything which can prejudice the rights of the pastor or harm parish goods.”



# APPENDIX III

## PAROCHIAL VICAR ANNUAL EVALUATION



# DIOCESE OF SACRAMENTO

## Parochial Vicar Annual Evaluation

### Evaluation of:

PAROCHIAL VICAR	BY: PASTOR	PARISH
-----------------	------------	--------

### Pastoral Skills

<b>1. How does the priest function in these ministries?</b>
<b>A) Liturgical Celebrations</b>
<b>B) Sacramental Preparation</b>
<b>C) Preaching</b>
<b>D) Visiting the sick</b>
<b>E) Working with youth</b>

<b>F) Working with the aged</b>
<b>G) Working with Parish organizations</b>
<b>2. How well does he work in team responsibilities; e.g. with the parish staff, with the sisters, with yourself and other priests?</b>

## Ministerial Concerns

<b>1. How do you evaluate his ability to live in a rectory situation?</b>
<b>2. Please comment on his health, personal appearance, ability to relate to others, etc.</b>

<b>3. Does he have any outstanding strengths or weaknesses?</b>
<b>4. Please comment upon his ability in English and other languages.</b>

**For Non-Incardinated Parochial Vicars only**

<b>1. If he was to request incardination into the Diocese, would you recommend him?</b>

**Additional comments**

<b>1. Any additional comments?</b>

**This evaluation has been reviewed and discussed with me.**

SIGNATURE OF PAROCHIAL VICAR	DATE
SIGNATURE OF EVALUATOR	DATE

**Please return to:**  
**Episcopal Vicar for Clergy**  
**Office of the Bishop**  
**2110 Broadway**  
**Sacramento, CA 95818**

# APPENDIX IV

## INSTRUMENT FOR EVALUATING A PAROCHIAL ADMINISTRATOR





**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**General Information:**

**1. General Information:**

**Your Name: Parish**

**City/Town:**

**2. Relationship with Priest:**

- ☐ Staff
- ☐ Leader
- ☐ Parishioner
- ☐ Other



**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**Introductory Section**

1. How long have you known Father?

- ☐ 0-6 months
- ☐ 7 months - 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21+ years

2. How long have you been a member of the parish?

- ☐ Under 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21-30 years
- ☐ over 31 years

3. How frequently do you see Father?

- ☐ Less than once a month
- ☐ About once a month
- ☐ About once a week
- ☐ Several times a week
- ☐ Daily

4. How involved are you in parish life?

- ☐ Minimally involved
- ☐ Involved (regular worship)
- ☐ Moderately involved (regular worship, one or two parish activities)
- ☐ Extremely involved (regular worship, many parish activities)





**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**General Instructions:**

**Please keep in mind the following points as you complete the survey:**

- 1. Your honest feedback is critical to the success of the process.**
- 2. Please consider each response, but do not ponder at length in determining the rating. It should take no longer than 30 minutes to complete the ratings.**
- 3. Make distinctions in your ratings. Each person has relative strengths and areas for growth.**
- 4. Do not try to guess how others will rate. It is your perspective that is being sought.**
- 5. For each criterion, please indicate the appropriate, from "3" Outstanding, which indicates that the priest demonstrates exceptionally high competence or effectiveness in this area, to "1" Unsatisfactory, which indicates that he demonstrates little or no competence or effectiveness in this area. Choose "0" Insufficient information, if you have insufficient information to determine a rating. Choosing "0" does not affect negatively the overall score.**

**Criteria:**

- "3" Outstanding**
- "2" Satisfactory**
- "1" Unsatisfactory**
- "0" Insufficient Information**

**6. Comments: Provide written comments that are constructive and specific. Offer examples that support your ratings. Focus on behaviors or suggested improvements. Please be respectful in wording your comments.**

**Thank you very much. May God bless you!**



**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**Section A- Part I:**

**The priest is first of all a minister of the Word of God. He is consecrated and sent forth to proclaim the good news of the kingdom to all, calling every person to the obedience of faith and leading believers to an ever increasing knowledge of and communion in the mystery of God, as revealed and communicated to us in Christ. (Pastores Dabo Vobis, #26).**

**1. PROCLAIMER OF GOD'S WORD: "Homilists or Preacher":**

	1. Preaches homilies that are rooted in Scripture and faithful to Church teaching in doctrine and morals:	2. Invites us to reflect on the church's teaching on social justice and on other socially significant and challenging issues:	3. Relates the Scriptures and Church teaching to our everyday life:	4. Seems well prepared:	5. Uses understandable language and speaks clearly and loudly enough to be heard:	6. Engages us and holds our attention:	7. Is inclusive with the different ethnic groups:
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**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

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**Catechetics plays a prominent role in this mission of evangelization, being the preferred instrument for the teaching and development of the faith. The priest, as a collaborator with the Bishop, has received the mandate and responsibility of encouraging, coordinating and directing the catechetical activity of the community with which he has been entrusted. (Directory for the Life and Ministry of Priests, #47, 1994)**

**1. "TEACHER & CATECHIST" (Religious Educator):**

	1. Provides for the catechetical formation (religious instruction and faith formation) of all adults, teens, and children of the parish:	2. Ensures fidelity and quality in the religious education opportunities offered for adults, youth, and children:	3. Fosters quality sacramental preparation for children, teens, and adults preparing for Baptism, Confirmation, Eucharist, marriage, and Reconciliation:	4. Supports the parish Church in a way that I can understand:	5. Presents the teaching of the Church doctrine, moral teaching and Church history:	6. Demonstrates a faithful, pastoral and current understanding of the Church	7. Participates in continuing education opportunities such as workshops, seminars, courses, and professional reading so as to deepen his theological and pastoral understanding:	8. Support religious education programs that serve parishioners that speak another language, other than English, as their primary language of communication:
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**Roman Catholic Diocese of Sacramento**  
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**Section B:**

**Effective preaching and celebration of the sacramental life of the community are the two fundamental avenues by which the priest makes visible and tangible the experience of the death and rising of Christ. Authentic preaching and worship require the priest to enter the ritual moment in such a way that the union between God and humankind is evident....the priest "immerses himself in the same mystery taking place and involves himself in the action he performs, becoming thereby a transparent witness in his own person to what he expresses in sacred word and symbols". (The Continuing Formation of Priests: Growing in Wisdom, Age and Grace, p.8)**

**1. LEADER OF WORSHIP:**

	1. Has a prayerful and reverent style of celebrating Mass:	2. Presides at sacramental celebrations such as Baptism, Weddings, and First Eucharist with reverence and sensitivity for the occasion:	3. Encourages deacon and lay liturgical ministers (Lectors, Eucharistic Ministers) to carry out their roles appropriately:	4. Respects and guides those who plan parish liturgies:	5. Is responsive to the pastoral needs of the sick, the dying or those who are in crisis or in grief:	6. Includes the languages and cultural faith expressions in the celebration of the liturgy and sacraments:
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**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
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**Section C - Part I:**

**In particular, the priest minister is the servant of Christ present in the church as mystery, communion and mission. In virtue of his participation in the 'anointing' of Christ, the priest can continue Christ's prayer, word, sacrifice and salvific action in the church. In this way, the priest... is servant of the church as communion because... he builds up the unity of the church community in the harmony of diverse vocations, charisms and services. (Pastores Dabo Vobis. # 16)**

**1. BUILDER OF COMMUNITY "Spiritual & Human Needs"**

	1. Shows care for the poor of the community:	2. Offers helpful pastoral counseling or spiritual direction:	3. Provides outreach to inactive Catholics and persons who do not belong to a church:	4. Acknowledges and respects the role of women in the Church:	5. Addresses the spiritual and human needs of immigrants in the parish:	6. Provides ministry for persons with special needs (e.g. the aged, persons with disabilities):
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## Periodic Review of Priestly Ministry

### Office of Clergy Formation

#### Section C - Part II:

##### 1. BUILDER OF COMMUNITY "Pastoral Style":

	1. Involves the parish community in developing a Gospel based vision/mission and goals for the parish as an Eucharistic Community in the Catholic Church.	2. Initiates or encourages effective and integrated program planning based on the parish mission and goals, and integrates these into the Diocesan Mission.	3. Ensures the quality of programs and projects through regular evaluation and revision	4. Knows when to offer direct leadership and when to delegate leadership to others.	5. Handles opposition, conflict, and dissent with understanding, honesty, and a spirit of reconciliation.	6. Seeks advice and counsel from others when necessary	7. Effectively completes tasks with sensitivity to people's feelings.	8. Listens and responds to people in a skillful and sensitive manner.	9. Speaks clearly and directly.	10. Writes clearly and concisely (e.g. parish bulletins, letter, etc.)	11. Is reasonably available to us (e.g. responds to phone calls, makes and keeps appointments, attends parish functions)	12. Is dependable and prompt for scheduled appointments, meetings, liturgies	13. Is effective in the manner he interacts with members of different language and ethnic groups in the parish
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**Roman Catholic Diocese of Sacramento**  
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**Office of Clergy Formation**

**Section C - Part III:**

**1. "WORKING WITH PERSONNEL & ADVISORY GROUPS":**

	1. Encourages people to discern an offer their gifts and talents in ministry within the parish community and the diocese:	2. Ensures that volunteers and parish leaders are trained for and supervised in their ministries:	3. Establishes and support parish leadership groups such as the Parish Pastoral Council, Finance Council, and School/Religious Education Boards:	4. (Pastors) Oversees the selection, hiring, supervision, and training of staff personnel:	5. Fosters effective staff interaction and coordination of staff responsibilities:	6. Invite and encourages the ideas and input of all member of the parish community in decision making, including representatives from the ethnic and language groups in the parish:
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**Roman Catholic Diocese of Sacramento**  
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**Section C - Part IV:**

**1. "RELIGIOUS LEADER WITHIN THE LARGER COMMUNITY":**

	1. Is appropriately involved in civic and community projects (e.g. local assistance drives, community-organizing ventures) either personally or in his support of parishioner participation:	2. Calls and challenges us to be responsive to the needs of the larger civic and world community:	3. Is appropriately involved in ecumenical and interfaith projects:	4. Supports regional or diocesan undertakings (e.g. regional planning, diocesan consultations, Diocesan Pastoral Council) either personally or through parish leadership:	5. Works effectively with different ethnic groups:
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**Section D:**

**1. STEWARD OF THE COMMUNITY'S RESOURCES:**

	1. Monitors the development and administration of a fiscally responsible budget for the parish or his areas of responsibility:	2. Promotes the gospel values of stewardship by modeling and promoting the careful use of the community's resources:	3. Encourages us to share our resources through involvement in the Parish Sharing Program and collections for the Diocese and universal church (if applicable):	4. (Pastor) Ensures that parish facilities are well maintained either personally or through the services of others:	5. (Pastor) Complies with parish and Diocesan personnel policies(i.e. hiring, role description, review of performance, termination, benefits, etc.):
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**Section E:**

**1. PROFESSIONAL AND PERSONAL QUALITIES (Necessary for Effective Ministry):**

	1. Nurtures his spiritual life:	2. Demonstrates appropriate social and relational skills and a sense of maturity:	3. Keeps appropriate boundaries of confidentiality with staff and parishioners regarding relationships and personal needs:	4. Learns about and prepares to meet the needs of the people of the parish community (e.g. language, culture, lifestyle, himself and etc.):	5. Accepts limitations and sets realistic goals for himself and for others:	6. Follows through on projects for pastoral work of the parish:	7. Does his share of the healthy sense of humor:	8. Has a diet, exercise, sufficient time off):	9. Takes care of himself (health, diet, exercise, sufficient time off):
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**Final Section - Comments:**

1. If you have any comments regarding specific section(s) (A-E) of the survey, please note them here: (Identify the section to which each of your comments apply: (A) Proclaimer of God's Word, (B) Leader of Worship, (C) Community Builder, (D) Steward of the Community's resources, or (E) Professional and Personal Qualities:

2. Are there conditions in your parish that might significantly impact the review process at this time? If so, describe the situation briefly. Examples might include a recent school closing, consolidation, building campaign, social outreach endeavor, etc.

3. Overall Comments:

--



**Roman Catholic Diocese of Sacramento**  
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**IMPORTANT NOTE:**

**Please be sure to enter your name below, one more time, this will serve as your signature for this survey, since we CANNOT CONSIDER your feedback without a signature. This form will not be seen by the priest. We ask for your name/signature because it is Diocesan policy to consider only signed reports. So, please type your name and last name in the box below.**

1. Name/Signature

2. Date:

MM DD YYYY

Today's date:

 /  

We would like to gratefully acknowledge the Archdiocese of Chicago and the Archdiocese of San Francisco for their generous sharing of these survey questions.

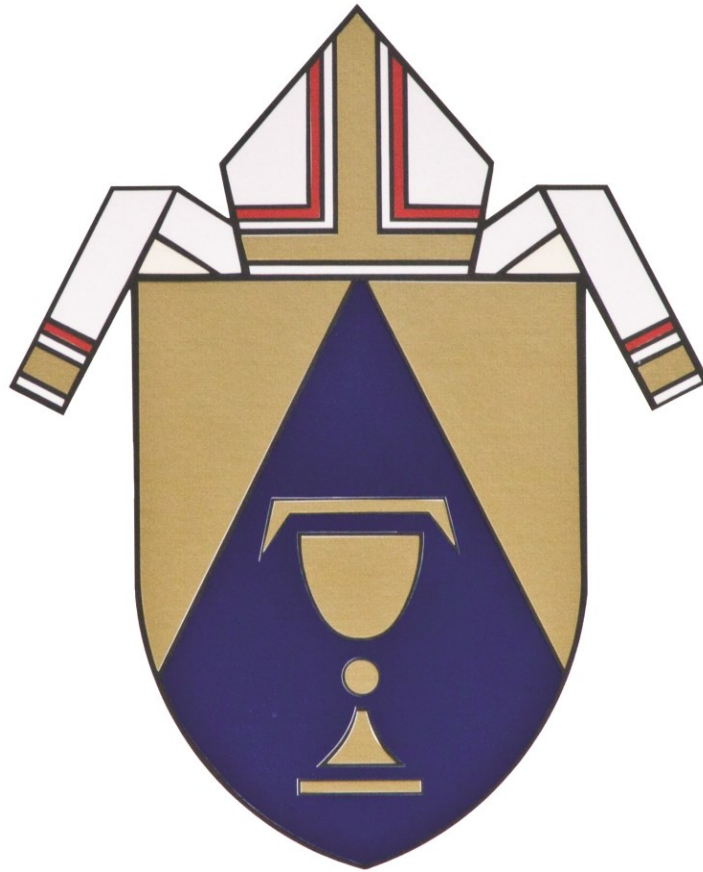
We appreciate your collaboration and taking the time to fill this survey. If you have any questions, please call (916) -733-0244 or e-mail: [jallen@scd.org](mailto:jallen@scd.org).

Thank you!

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# APPENDIX V

## INSTRUMENT FOR EVALUATING A PASTOR





**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**General Information:**

**1. General Information:**

**Your Name: Parish**

**City/Town:**

**2. Relationship with Priest:**

- ☐ Staff
- ☐ Leader
- ☐ Parishioner
- ☐ Other





**Roman Catholic Diocese of Sacramento**  
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**Introductory Section**

1. How long have you known Father?

- ☐ 0-6 months
- ☐ 7 months - 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21+ years

2. How long have you been a member of the parish?

- ☐ Under 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21-30 years
- ☐ over 31 years

3. How frequently do you see Father?

- ☐ Less than once a month
- ☐ About once a month
- ☐ About once a week
- ☐ Several times a week
- ☐ Daily

4. How involved are you in parish life?

- ☐ Minimally involved
- ☐ Involved (regular worship)
- ☐ Moderately involved (regular worship, one or two parish activities)
- ☐ Extremely involved (regular worship, many parish activities)



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**General Instructions:**

**Please keep in mind the following points as you complete the survey:**

- 1. Your honest feedback is critical to the success of the process.**
- 2. Please consider each response, but do not ponder at length in determining the rating. It should take no longer than 30 minutes to complete the ratings.**
- 3. Make distinctions in your ratings. Each person has relative strengths and areas for growth.**
- 4. Do not try to guess how others will rate. It is your perspective that is being sought.**
- 5. For each criterion, please indicate the appropriate, from "3" Outstanding, which indicates that the priest demonstrates exceptionally high competence or effectiveness in this area, to "1" Unsatisfactory, which indicates that he demonstrates little or no competence or effectiveness in this area. Choose "0" Insufficient information, if you have insufficient information to determine a rating. Choosing "0" does not affect negatively the overall score.**

**Criteria:**

- "3" Outstanding**
- "2" Satisfactory**
- "1" Unsatisfactory**
- "0" Insufficient Information**

**6. Comments: Provide written comments that are constructive and specific. Offer examples that support your ratings. Focus on behaviors or suggested improvements. Please be respectful in wording your comments.**

**Thank you very much. May God bless you!**



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**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**Section C - Part III:**

**1. "WORKING WITH PERSONNEL & ADVISORY GROUPS":**

- |   |   |  |  |  |   |
|---|---|--|--|--|---|
| 1. Encourages people to discern an offer their gifts and talents in ministry within the parish community and the diocese: | 2. Ensures that volunteers and parish leaders are trained for and supervised in their ministries: | 3. Establishes and support parish leadership groups such as the Parish Pastoral Council, Finance Council, and School/Religious Education Boards: | 4. (Pastors) Oversees the selection, hiring, supervision, and training of staff personnel: | 5. Fosters effective staff interaction and coordination of staff responsibilities: | 6. Invite and encourages the ideas and input of all member of the parish community in decision making, including representatives from the ethnic and language groups in the parish: |
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**Roman Catholic Diocese of Sacramento**  
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**Office of Clergy Formation**

**Section C - Part IV:**

**1. "RELIGIOUS LEADER WITHIN THE LARGER COMMUNITY":**

1. Is appropriately involved in civic and community projects (e.g. local assistance drives, community-organizing ventures) either personally or in his support of parishioner participation:

2. Calls and challenges us to be responsive to the needs of the larger civic and world community:

3. Is appropriately involved in ecumenical and interfaith projects:

4. Supports regional or diocesan undertakings (e.g. regional planning, diocesan consultations, Diocesan Pastoral Council) either personally or through parish leadership:

5. Works effectively with different ethnic groups:

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**Roman Catholic Diocese of Sacramento**  
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**Section D:**

**1. STEWARD OF THE COMMUNITY'S RESOURCES:**

- |  |  |   |   |  |
|--|--|---|---|--|
| 1. Monitors the development and administration of a fiscally responsible budget for the parish or his areas of responsibility: | 2. Promotes the gospel values of stewardship by modeling and promoting the careful use of the community's resources: | 3. Encourages us to share our resources through involvement in the Parish Sharing Program and collections for the Diocese and universal church (if applicable): | 4. (Pastor) Ensures that parish facilities are well maintained either personally or through the services of others: | 5. (Pastor) Complies with parish and Diocesan personnel policies(i.e. hiring, role description, review of performance, termination, benefits, etc.): |
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**Roman Catholic Diocese of Sacramento**  
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**Section E:**

**1. PROFESSIONAL AND PERSONAL QUALITIES (Necessary for Effective Ministry):**

	1. Nurtures his spiritual life:	2. Demonstrates appropriate social and relational skills and a sense of maturity:	3. Keeps appropriate boundaries of confidentiality with staff and parishioners regarding relationships and personal needs:	4. Learns about and prepares to meet the needs of the people of the parish community (e.g. language, culture, lifestyle, himself and etc.):	5. Accepts limitations and sets realistic goals for himself and for others:	6. Follows through on projects for pastoral work of the parish:	7. Does his share of the work of the parish:	8. Has a healthy sense of humor:	9. Takes care of himself (health, diet, exercise, sufficient time off):
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**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**Final Section - Comments:**

1. If you have any comments regarding specific section(s) (A-E) of the survey, please note them here: (Identify the section to which each of your comments apply: (A) Proclaimer of God's Word, (B) Leader of Worship, (C) Community Builder, (D) Steward of the Community's resources, or (E) Professional and Personal Qualities:

2. Are there conditions in your parish that might significantly impact the review process at this time? If so, describe the situation briefly. Examples might include a recent school closing, consolidation, building campaign, social outreach endeavor, etc.

3. Overall Comments:

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**Roman Catholic Diocese of Sacramento**  
**Periodic Review of Priestly Ministry**  
**Office of Clergy Formation**

**IMPORTANT NOTE:**

**Please be sure to enter your name below, one more time, this will serve as your signature for this survey, since we CANNOT CONSIDER your feedback without a signature. This form will not be seen by the priest. We ask for your name/signature because it is Diocesan policy to consider only signed reports. So, please type your name and last name in the box below.**

1. Name/Signature

2. Date:

MM DD YYYY

Today's date:  /  /

We would like to gratefully acknowledge the Archdiocese of Chicago and the Archdiocese of San Francisco for their generous sharing of these survey questions.

We appreciate your collaboration and taking the time to fill this survey. If you have any questions, please call (916) -733-0244 or e-mail: [jallen@scd.org](mailto:jallen@scd.org).

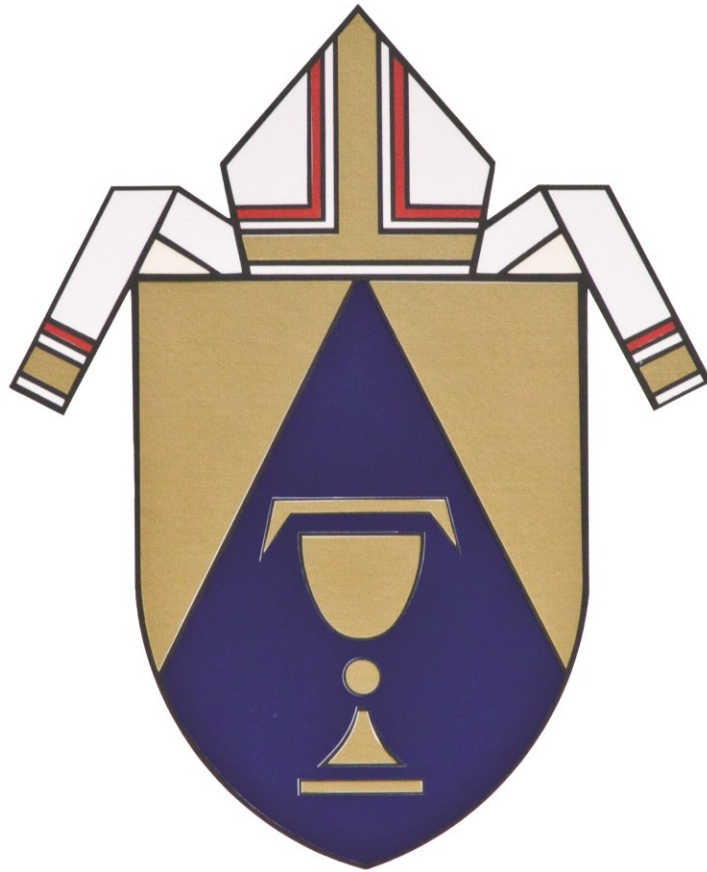
Thank you!

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# APPENDIX VI

## CODE OF PASTORAL CONDUCT





OFFICE OF THE BISHOP

## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-0200 • Fax 916/733-0215

### DECREE OF PROMULGATION **Code of Pastoral Conduct**

I, the undersigned Bishop of the Diocese of Sacramento, do hereby decree that the attached revision of the *CODE OF PASTORAL CONDUCT* is particular law of the Diocese of Sacramento, effective upon promulgation.

I further decree that it be promulgated by publication on the diocesan website, and that copies be distributed as noted in Section 8 of this policy, and that notice of its promulgation be made in the *Official* column of the *Catholic Herald*.

Given at the Diocesan Pastoral Center in Sacramento, California on this 27th day of July, in the year of Our Lord, two thousand eleven.



**+JAIME SOTO**  
Bishop of Sacramento



Kathy Conner  
Chancellor

# DIOCESE OF SACRAMENTO

## **Code of Pastoral Conduct** **For Priests, Deacons, Pastoral Ministers, Administrators,** **Staff and Volunteers**

### **I. Preamble**

All priests, deacons, pastoral ministers, administrators, staff, and volunteers (collectively “Church Workers”) in our parishes, religious communities/institutes, and organizations must uphold Christian values and conduct. The purpose of this *Code of Pastoral Conduct for Priests, Deacons, Pastoral Ministers, Administrators, Staff, and Volunteers (Code of Pastoral Conduct)* is not to attempt to anticipate every situation that might arise, but to provide a set of standards for conduct and appropriate behavior to guide all Church Workers in pastoral ministry situations. To the extent that pastoral ministry situations overlap with the parish workplace, the *Code of Pastoral Conduct* is also intended to complement and supplement the standards for workplace conduct that are set forth in the *Personnel Handbook* for the Diocese of Sacramento.

### **II. Responsibility for Compliance**

The public and private conduct of Church Workers can inspire and motivate people, but it can also scandalize and undermine the people's faith. Church Workers must, therefore, at all times be aware of the responsibilities that accompany their work, and the potential impact of their conduct. They must also know that God's goodness and grace supports them in their ministry.

Accordingly, each individual has a personal responsibility to comply with the *Code of Pastoral Conduct*. Church Workers who disregard this *Code of Pastoral Conduct* will be subject to remedial action by the Diocese of Sacramento. Corrective action may take various forms – including verbal or written warning, termination of employment, or removal from ministry—depending on the specific nature and circumstances of the offense. Any criminal conduct as defined by California law will also be reported to the responsible legal authority.

This *Code of Pastoral Conduct* is enacted to create a safe, appropriate and Christian environment for all those involved in Church ministry in the Diocese of Sacramento.

### **III. Standards of Conduct**

#### **1. Conduct for Pastoral Counselors and Spiritual Directors**

Specific pastoral standards apply to Church Workers who provide pastoral, spiritual, and/or therapeutic counseling services to individuals, families, or other groups (collectively referred to in this section as “Pastoral Counselors and Spiritual Directors”).

*Pastoral Counselors and Spiritual Directors, by the very nature of their particular responsibilities, must respect the rights and advance the welfare of each person they counsel.*

- 1.1 Pastoral Counselors and Spiritual Directors shall not step beyond their competence in counseling situations and will refer clients to other professionals when the client is in

need of attention beyond the training or competence of the counselor. For example, Pastoral and Spiritual Directors should not provide therapeutic marital counseling to persons in troubled marriages and should refer such persons to suitably qualified and licensed marriage and family therapists, who are preferably Catholics and acquainted with Church teaching on marriage.

- 1.2 Pastoral Counselors and Spiritual Directors (Clergy and Religious in particular) should always be aware that their position and authority as religious ministers may draw individuals to cross acceptable relationship boundaries when interacting with them. Pastoral Counselors and Spiritual Directors should be alert to circumstances where individuals begin to seek counseling or relationship needs beyond that which can be appropriately provided by a religious minister. In such instances, Pastoral Counselors and Spiritual Directors should take steps to clarify and appropriately limit the boundaries of the relationship, and, if necessary, should refer the individual to another counselor or professional.
- 1.3 Pastoral Counselors and Spiritual Directors will carefully consider the possible consequences before entering into a counseling relationship with someone with whom they have a pre-existing relationship (i.e., employee, professional colleague, friend, or other pre-existing relationship). *[See Section 6]*.
- 1.4 Pastoral Counselors and Spiritual Directors will not audiotape, videotape, or otherwise electronically record their interactions, specifically including counseling sessions, with persons with whom they are working.
- 1.5 Clergy and Religious who are committed to a celibate lifestyle are called to be an example of celibate chastity in all relationships at all times, particularly in pastoral counseling settings. Clergy and Religious should remain mindful of their obligations in this regard and strive to avoid even the appearance of impropriety in their physical interactions with others, particularly those with whom they have a pastoral relationship.
- 1.6 Pastoral Counselors and Spiritual Directors must never engage in sexual intimacies or romantic relationships with the persons they counsel. This includes consensual and non-consensual contact, forced physical contact, and inappropriate sexual comments.
- 1.7 Pastoral Counselors and Spiritual Directors also will not engage in sexual intimacies or romantic relationships with individuals who are close to the client (such as relatives or friends of the client) because they must presume that the risk of exploitation or harm to the client can be created by such intimate relationships.
- 1.8 Pastoral Counselors and Spiritual Directors assume the full burden of responsibility for establishing and maintaining clear, appropriate boundaries in all counseling and counseling-related relationships.
- 1.9 Inappropriate physical contact of any kind between Pastoral Counselors or Spiritual Directors and the persons they counsel (i.e., any touching or hugging beyond the limited type of contact that might be offered in a greeting or as a gesture of Christian comfort to a distraught individual) can be misconstrued and will be avoided.

1.10 Counseling sessions will be conducted in appropriate settings at appropriate times. As a general rule, sessions should take place in a professional setting in a parish office or, if no parish office facilities are available, in professional reception or meeting areas in a rectory or church building.

1.10.1 No sessions will be conducted in the private living quarters of a Pastoral Counselor/Spiritual Director or client.

1.10.2 Sessions will not be held at places or times that would tend to confuse the client about the nature of the counseling relationship. Counseling sessions generally should be held during regular business hours and in settings consistent with the standards set forth below.

1.10.3 In extreme cases involving crisis and/or emergency, a session may need to take place in a location or at a time most convenient for the person being counseled.

Enclosed rooms or offices in which sessions are held should have a window in the door, or, at a minimum, the door should be left open or ajar. If to do so would risk a breach of confidentiality of the counseling communications, then another, suitable location should be secured.

## **2. Confidentiality**

*Information disclosed to a Pastoral Counselor or Spiritual Director during the course of counseling, advising, or spiritual direction will be held in strict confidence.*

Consultation with the appropriate Church supervisory personnel is required before disclosure of any confidential information obtained during counseling sessions other than those cases where reasonable suspicion of the abuse of minors, elders over 65 years of age, or dependent adults exists. In those cases, mandated reporters are required, by law, to report such suspicions directly to civil authorities.

**The obligations contained in these Pastoral Counseling Standards are independent of the seal of the Sacrament of Reconciliation. Under no circumstances whatsoever can there be any disclosure — even indirect disclosure — of information received through the Sacrament of Reconciliation.**

2.1 Information obtained in the course of sessions will be confidential, except for compelling professional reasons (as set forth below) or as required by law.

2.1.1 If there is clear and imminent danger to the client or to others, the Pastoral Counselor or Spiritual Director may disclose only the information necessary to protect the parties affected and to prevent harm to others.

2.1.2 Before disclosure is made, if feasible, the Pastoral Counselor or Spiritual Director will inform the person being counseled about the disclosure and the potential consequences.

2.2 Pastoral Counselors and Spiritual Directors will discuss the nature of confidentiality and its limitations with each person in counseling.

- 2.3 Pastoral Counselors and Spiritual Directors will keep minimal records of the content of sessions, in order to protect against any inadvertent disclosure of client confidences. However, records of any referrals made to competent professionals shall be maintained.
- 2.4 Knowledge that arises from professional contact may be used in teaching, writing, homilies, or other public presentations only when effective measures are taken to absolutely safeguard the individual's identity.

### **3. Interaction with Youth**

*Church Workers will give particular attention to maintaining appropriate contact with youth (minors under the age of 18).*

- 3.1 Church Workers must be aware of their own and others' vulnerability to appearance or perception of impropriety when working alone with youth. At all times, Church Workers should, therefore, use a team approach to managing youth activities. At least two adults (preferably a team of several adults) will organize and supervise youth activities.
- 3.2 Except in an emergency or urgent circumstances involving the youth's safety, Church Workers shall never be alone with a youth during any parish or church-related activity or setting. For example, adults should avoid situations that put them in a position of being alone with a minor in a rectory, parish building, school, or other closed room (except as required for the Sacrament of Reconciliation).
- 3.3 Church Workers will observe careful boundaries concerning any type of physical contact with youth. Beyond a simple handshake or a friendly, brief hug, any physical contact should only take place in public circumstances, and prudent discretion and respect should be applied by Church Workers in order to avoid any appearance of impropriety.
- 3.4 Clergy and Religious shall never permit a youth to stay overnight in their private accommodations or residence nor shall Clergy or Religious ever be permitted to share a room overnight with a youth. An exception can be made in the case of immediate family members of the Clergy or Religious, provided that a parent or adult guardian of the youth also stays overnight and that separate accommodations are provided for the youth and his or her parent or adult guardian.
- 3.5 Church Workers will not provide shared, private, overnight accommodations for individual youth, including, but not limited to, accommodations in any Church-owned facility, private residence, hotel room, or any other place where there is no other adult supervision present.
  - 3.5.1 Church Workers will use a team approach to managing emergency situations. A team of adults will consult with each other about the best approach to take in emergency situations.

- 3.6 Church Workers are prohibited from taking youth home or to another location unless another adult is present in the vehicle or the parent/guardian of the youth has given express prior permission. Church Workers likewise shall not permit other adults to take a youth home or to another location unless at least two adults will be present in the vehicle or the parent/guardian of the youth has given express prior permission.
- 3.7 Church Workers shall not give gifts to a specific youth under their care or supervision unless a gift is given to all other youth under their care and, then even in such situations, any such gifts shall be modest, inexpensive tokens of friendship or appreciation. This provision shall not be construed from precluding Clergy and Religious from giving gifts to youth who are members of their immediate families, such as nieces and nephews.
- 3.8 Church Workers will familiarize themselves with, and understand the contents of, the child abuse regulations and reporting requirements for the State of California, and will comply with those mandates. Church workers shall also complete, in a timely manner, any safe environment and/or youth protection training required of them by the Diocese of Sacramento.
- 3.9 Church Workers shall take all necessary action to ensure that that no one working with youth is either in possession of illegal drugs or under the influence of alcohol or illegal drugs. Church Workers shall take all necessary action to ensure that youth under their care or supervision do not have access to illegal drugs or alcohol. Church Workers may never serve or supply alcohol to youth or adults under the age of 21. Persons under 21 may, of course, partake of both species of the Eucharist, including the Precious Blood, according to the norms of canon law.

#### **4. Sexual Conduct**

*Church Workers must not, for sexual gain or intimacy, or any other reason, exploit the trust placed in them by the faith community.*

- 4.1 Physical contact with individuals can be misconstrued. Contact between Church Workers and other individuals should, if at all, (a) be completely nonsexual in nature, (b) be otherwise not inappropriate, and (c) take place in a public setting.
- 4.2 Clergy and religious, who are obligated to the discipline of celibacy by virtue of their orders or religious profession, are called to be an example of celibate chastity in all relationships at all times, and shall scrupulously avoid engaging in any form of sexual conduct with other individuals. Permanent deacons are called to be an example of marital chastity and scrupulously shall avoid engaging in any form of sexual or romantic conduct with individuals other than their spouses.
- 4.3 Church Workers who provide pastoral counseling or spiritual direction services must avoid developing inappropriately-intimate relationships with minors, other staff, parishioners, or any other individuals.. All Church Workers must behave in a professional manner at all times, consistent with the standards of employee conduct that are set forth in the *Personnel Handbook* and *Priest Personnel Policy*, as applicable, for the Diocese of Sacramento.

- 4.4 No Church Workers may exploit any other person, youth or adult, for sexual purposes.
- 4.5 All Church Workers have a responsibility to report sexual misconduct in violation of this *Code of Pastoral Conduct*. Requests for foreign language interpreters made by Church Workers who are reporting or responding to allegations of sexual misconduct will be accommodated to the extent reasonable and feasible under the circumstances, as determined in the discretion of the Diocese.
- 4.6 It is the policy of the Diocese of Sacramento to investigate any and all allegations of sexual misconduct thoroughly and promptly, and to report to civil authorities any sexual misconduct involving minors. Any such investigation will be conducted in a manner consistent with the procedures set forth in the *Personnel Handbook* and the *Sexual Misconduct Policy* for the Diocese of Sacramento, and in a manner that protects the rights of all involved. If the investigation confirms that sexual misconduct has taken place, the Diocese will take corrective action, including discipline, up to and including immediate termination of employment or removal from ministry.

## **5. Harassment**

*Church Workers must not engage in any form of harassment against staff, volunteers, or parishioners, and must not tolerate such harassment by other Church Workers.*

- 5.1 Church Workers will help provide a professional work environment that is free from any form of harassment or discrimination.
- 5.2 Harassment consists of unwelcome, inappropriate conduct, whether verbal, physical, or visual, that is based upon the protected characteristics designated as protected by law, such as race, color, gender, religion, national origin, age, or physical or mental disability. Examples of harassment may include, but are not necessarily limited to, jokes, kidding, or teasing directed at a person based on his or her protected status. Sexual harassment, a particular form of sex discrimination, is conduct based on sex, whether directed towards a person of the opposite or same sex, and may include explicit sexual propositions, sexual innuendo, suggestive comments, sexually oriented kidding or teasing, practical jokes, jokes about obscene printed or visual material, and physical contact such as patting, pinching, or brushing against another person's body.
- 5.3 All Church Workers share a responsibility to help assure that each parish is harassment-free. If any parish employee or other Church Worker feels that he or she has experienced or witnessed harassment, he or she is to notify his or her immediate supervisor, the Pastor, or, in the alternative, the Office of the Bishop where the report will be given to the Bishop's Delegate for such matters. The Diocese forbids retaliation against anyone for reporting harassment, assisting in making a harassment complaint, or for cooperating in a harassment investigation.
- 5.4 It is the policy of the Diocese to investigate all complaints of harassment or discrimination thoroughly and promptly. If an investigation confirms that a violation of the anti-harassment provisions of this *Code of Pastoral Conduct* has



occurred, the Diocese will take corrective action, including discipline, up to and including immediate termination of employment or removal from ministry.

## **6. Conflicts of Interest**

*Clergy, staff, and volunteers will avoid situations that might present a conflict of interest.*

- 6.1 A conflict of interest occurs when Church Workers use or attempt to use their positions for personal gain or in a manner detrimental or disruptive to the interests or mission of the Diocese. It is a conflict of interest, for example, for Church Workers to engage in independent business activity in a manner that exploits (or appears to exploit) their status as religious/pastoral ministers at the expense of individuals served by ministry.
- 6.2 Church Workers will avoid conflicts of interest. Church Workers who engage in independent business will disclose those facts to individuals to whom they minister, prior to engaging in any business dealings with those individuals, and Church Workers will not take advantage of anyone they serve.
- 6.3 Conflicts of interest may also arise when a Pastoral Counselor's or Spiritual Director's independent judgment is impaired by prior dealings with a client, personal involvement, or taking sides to advocate for one (person) against another. If such circumstances arise, the Pastoral Counselor or Spiritual Director will advise the parties that he or she can no longer provide services and refer them to another Pastoral Counselor or Spiritual Director.

## **7. Reporting Ethical or Professional Misconduct, or Criminal Activity**

*Clergy, staff, and volunteers have a duty to report their own ethical or professional misconduct and the misconduct of others.*

- 7.1 Church Workers must hold each other accountable for maintaining the highest ethical and professional standards. When there is a clear indication of criminal activity by other Church Workers, each individual has an obligation to notify the Office of the Bishop and to notify the proper civil authorities immediately.
- 7.2 When an uncertainty exists about whether a situation or course of conduct violates this *Code of Pastoral Conduct* or other religious, moral, or ethical principles, Church Workers should consult with supervisors and/or the additional contacts set forth in the reporting provisions of the Personnel Handbook for the Diocese.
- 7.3 When it appears that a member of clergy, a staff member, or a volunteer has violated this *Code of Pastoral Conduct* or other religious, moral, or ethical principles, Church Workers will:
  - Report the issue to a supervisor or next higher authority; or
  - Refer the matter directly to the Office of the Bishop.

## **8. Administration**

*Clergy, staff, and volunteers will acknowledge receipt of this Code of Conduct, and complete background checks and additional safe environment training.*

- 8.1 Personnel and other administrative decisions made by Church Workers will meet civil and canon law obligations, will comply with this *Code of Pastoral Conduct*, and will comply with any relevant provisions in the Personnel Handbook for the Diocese.
- 8.2 Staff employed within the Diocese of Sacramento will receive a copy of this *Code of Pastoral Conduct* and sign an acknowledgment of receipt.
- 8.3 Volunteers working in a ministry with minors will receive copies of this *Code of Pastoral Conduct*, the *Administrative Policies and Procedures Regarding Sexual Misconduct*, and the *Guidelines for Adults working with Children*, and sign an acknowledgement of receipt of those documents.
- 8.4 Staff and volunteers working with minors are required to submit to a background check prior to engaging in their ministry, employment or volunteer work. In addition, every person working with minors must complete the Shield the Vulnerable training.
- 8.5 Volunteers working in ministries that do not serve minors will receive printed copies of the *Code of Pastoral Conduct* and the *Administrative Policies and Procedures Regarding Sexual Misconduct*, and sign an acknowledgement of receipt of those documents.
- 8.6 This policy shall be available to the general public by way of the diocesan website.

## **9. Church Workers: Personal Well-being**

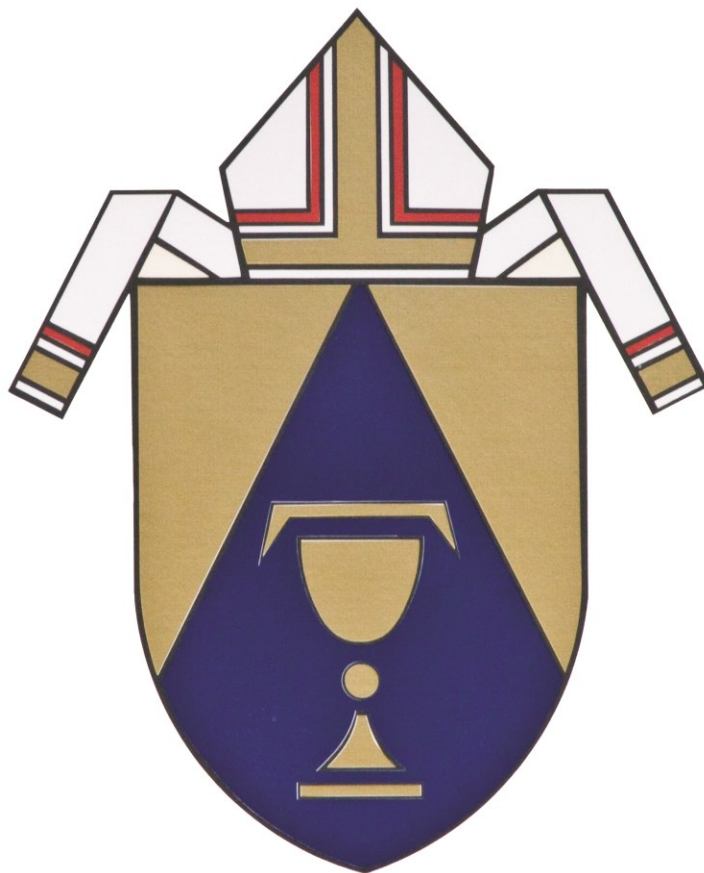
*Church Workers have the duty to be responsible for their own spiritual, physical, mental, and emotional health.*

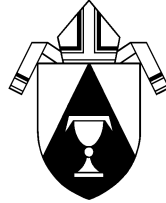
- 9.1 Church Workers will be aware of warning signs that indicate potential problems with their own spiritual, physical, mental, and/or emotional health.
- 9.2 Church Workers will seek help immediately whenever they notice behavioral or emotional warning signs in their own professional and/or personal lives.
- 9.3 Church Workers must address their own spiritual needs. Support from a Spiritual Director is highly recommended.
- 9.4 Inappropriate or illegal use of alcohol and drugs in a manner that in any way impacts the ministry of Church Workers is prohibited.

Revised and Promulgated on the 27<sup>th</sup> day of July in the year of Our Lord, two thousand eleven.

# APPENDIX VII

## SEXUAL MISCONDUCT POLICY





**DIOCESE OF SACRAMENTO  
ADMINISTRATIVE POLICIES AND PROCEDURES  
REGARDING SEXUAL MISCONDUCT**

**PREFACE:**

The Diocese of Sacramento has revised its policies and procedures for addressing the failure of any of its personnel to follow the teachings of the Church, and relevant civil law, with respect to sexual conduct. This written statement describes practices that have been developed and improved over several years and is a revised version of policies promulgated on December 30, 1994, and April 8, 2002.

The Church calls all to live a life of holiness in conformity with the moral and ethical principles she teaches. Accordingly, and in addition to the mandates that exist under secular civil law, individuals who work for or minister in the Church must strive to live their lives according to the evangelical counsels, as these have been expounded by the tradition of the Church and exemplified in the lives of the saints. This is an expectation for lay people, but the conduct of priests, deacons and religious will be subject to even greater scrutiny under this policy.

Please note that these Policies and Procedures take into account the rights and duties enacted and acknowledged by both civil and canon law. These policies must always be viewed and applied in the light of the Gospel, canon law, and the canonical principle of the well being of the people (*salus animarum suprema lex*).

Approved and promulgated on the 28th day of October,  
in the year of Our Lord 2008

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**/s/ WILLIAM K. WEIGAND**  
Bishop of Sacramento

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/s/ Rev. Mark R. Richards  
Chancellor

**Note:** These Policies and Procedures have been edited to conform with and adapt to the Essential Norms and Charter approved by the United States Conference of Catholic Bishops on June 14, 2002, as amended 2006.

## **ADMINISTRATIVE POLICIES AND PROCEDURES REGARDING SEXUAL MISCONDUCT**

### **I. STATEMENT OF PURPOSE**

It is the policy of the Diocese of Sacramento that all clergy, members of religious institutes, lay personnel, and volunteers in the Diocese (“Diocesan Personnel”) must comply with the teachings of the Church with regard to sexual conduct and all applicable federal, state and local laws regarding the detection and reporting of sexual misconduct and child abuse, as well to cooperate fully with federal, state, and local law enforcement agencies regarding the investigation of such allegations.

Sexual conduct contrary to the teachings of the Church is sinful, is contrary to the human dignity of the participants, undermines relationships based upon trust and confidence, is harmful to the Catholic community of the Faithful, and, in some cases, may constitute a crime under the laws of the State of California and/or a grave delict under the norms of canon law. Consequently, the Diocese of Sacramento will not tolerate any form of sexual misconduct — most especially any abuse of children and young people — perpetrated by any Diocesan Personnel within any of its institutions.

Therefore, it has been determined that with respect to issues of sexual misconduct, the Diocese has adopted this Policy and shall implement procedures to:

- A. Train all Diocesan Personnel with respect to issues of professional boundaries, sexual misconduct, and the detection and prevention of child abuse;
- B. Conduct background checks, in a manner observant of state and federal privacy laws, for all Diocesan Personnel that have regular contact with minors;
- C. Provide a sensitive and effective system for receiving reports concerning allegations of sexual misconduct by Diocesan Personnel;
- D. Respond to reports of sexual misconduct by undertaking professionally supervised, objective investigations conducted by professional investigators that place a priority upon the prevention of future harm to the complainant and other persons potentially at risk;
- E. Take proper administrative action with respect to allegations of sexual misconduct by Diocesan Personnel, including reporting child abuse to appropriate government authorities when required by California’s mandatory reporting laws, and, when appropriate, convening the Diocese’s Independent Review Board;
- F. Provide prompt and competent pastoral care to individuals who have been harmed by the sexual misconduct of Diocesan Personnel, based upon individual level of need for such services; and,

- G. Ensure that when an act of sexual abuse of a minor by a priest or deacon is admitted or is established after an appropriate process in accordance with canon law, the offending priest or deacon will be removed permanently from ecclesiastical ministry and, if the case so warrants, seek dismissal from the clerical state.

## II. DEFINITIONS

For the purpose of these Policies and Procedures the following definitions apply:

- A. **Minor:** Any person under 18 years of age.
- B. **Diocesan Personnel:** All clergy (bishops, priests, and deacons), members of religious institutes, lay employees (at all parish, school, or other diocesan workplaces), volunteers, or other representatives of the Diocese of Sacramento.
- C. **Sexual Misconduct:** Any sexual behavior engaged in by Diocesan Personnel that is contrary to the moral doctrine of the Church, canon law, or civil law. Sexual Misconduct includes, but is not limited to:
1. Sexual Abuse of Minors: Sexual abuse of minors, for purposes of this Policy, shall include any offense committed by Diocesan Personnel upon a minor, that is against the Sixth Commandment of the Decalogue, as interpreted through the norms of canon law. Such sexually abusive conduct with a minor shall include, but not be limited to, any physical sexual contact, nonphysical sexual interaction, exploitation, or molestation that is engaged in with the intent of arousing, appealing to, or gratifying the lust, passions, or sexual desires of the perpetrator or the minor.
  2. Sexual Misconduct Involving Adults: Sexual misconduct involving adults includes any offense committed by Diocesan Personnel upon another adult, that is against the Sixth Commandment of the Decalogue, as interpreted through the norms of canon law. Such conduct shall include, but not be limited to, sexual relations (whether or not consensual), the making of unwelcome sexual advances, and in particular the requesting of sexual favors from a person with whom the offender has a ministerial relationship or other relationship of trust or confidence.
  3. The Possession and/or Dissemination of Pornographic Materials: The possession and/or dissemination of obscene or pornographic materials by Diocesan Personnel is prohibited. Such prohibited conduct shall include, but not be limited to, the possession, use, and/or dissemination of books, photographs, pictures, drawings, videocassettes, video disks, or any other computer or electronic media, that portray degrading and violent sexual behavior, which demeans the human character, debases the individual and is openly pornographic and morally offensive. The use of the Internet by Diocesan Personnel to acquire and/or transmit obscene material, or to engage in telecommunications regarding

degrading and violent sexual behavior, shall, in addition to being a violation of diocesan personnel policies, constitute Sexual Misconduct under the terms of this Policy.

- D. **Diocesan Bishop:** “Diocesan Bishop” as used in these Policies and Procedures means the Roman Catholic Bishop of the Diocese of Sacramento or whoever governs the Diocese in accordance with canon law while the See is vacant, or such person as either of these may delegate from time to time to act in the place of the Diocesan Bishop in these matters.
- E. **Diocese:** “Diocese” as used in these Policies and Procedures means the Roman Catholic Diocese of Sacramento and its constituent parishes, schools, ministries, institutions, and other juridic persons. It does not include those autonomous Catholic religious institutions, ministries, and juridic persons owned and operated by religious institutes or other Catholic organizations.
- F. **Pastoral Care Coordinator:** The person who is appointed by the Diocesan Bishop or his delegate and assigned the specific duty of interfacing with any individual who makes a report of Sexual Misconduct, and carrying out the Diocesan Pastoral Care Response, as crafted under this policy.
- G. **Independent Review Board:** The Diocesan Independent Review Board is a review board appointed by the Diocesan Bishop to function as a confidential consultative body to the Bishop in discharging his responsibilities regarding the implementation of the “Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons,” as adopted by the Bishops of the United States.
- H. **Bishop’s Delegate:** The Bishop’s Delegate shall be appointed by the Bishop of Sacramento to oversee the response and investigation of allegations of sexual misconduct involving diocesan personnel. The name and contact information related to the Bishop’s Delegate shall be posted on the Diocese’s website and shall appear in the annual diocesan directory.

### III. GENERAL PROVISIONS

- A. The purpose of these Policies and Procedures is, first and foremost, to protect people from all forms of Sexual Misconduct that might be perpetrated by Diocesan Personnel within Diocesan institutions and ministries. The loss of trust that is often the consequence of such abuse becomes even more tragic when it leads to a loss of the faith that the Diocese has a sacred duty to foster.
- B. The damage caused by sexual abuse of minors is particularly devastating and long-lasting and, thus, is a matter of the utmost concern to the Diocese. Consequently, it is the policy of the Diocese of Sacramento to work with parents, civil authorities, educators, and various organizations in the community to make and maintain the safest environment possible for minors.

- C. The Diocese is committed to reaching out to those who have been sexually abused as minors by anyone serving the Church in ministry, employment, or a volunteer position, whether the sexual abuse was recent or occurred many years ago. To this end, the Diocese shall ensure that pastoral and spiritual care is available to those who have been abused, as well as to their families.
- D. The Diocese shall be as open as possible with the people in parishes and communities about instances of sexual abuse of minors, with respect always for the privacy and the reputation of the individuals involved.
- E. These Policies and Procedures complement, but in no way limit or supersede, the provisions of the Diocese's Policy Against Discrimination and Harassment (as set forth in the Personnel Handbook for the Diocese of Sacramento), particularly as that policy addresses and prohibits sexual harassment in the workplace. Employees who experience or become aware of workplace sexual harassment should report such circumstances according to the procedures set forth in the Handbook.
- F. These Policies and Procedures are complementary to the universal law of the Church and are to be interpreted in accordance with that law, particularly CIC, canons 1717-1719. Moreover, they have been adopted by the Diocesan Bishop pursuant to Norm 2 of the "Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons," as promulgated in accordance with the practice of the United States Conference of Catholic Bishops on May 5, 2006.

#### **IV. PROHIBITED ACTIVITIES**

- A. Diocesan Personnel are strictly prohibited from engaging in all forms of Sexual Misconduct, as defined in Paragraph II, subdivision (C).
- B. Diocesan Personnel who are found to have engaged in Sexual Misconduct (other than sexual abuse of a minor, which is treated in the next paragraph) shall be subject to discipline under the provisions of the Personnel Handbook for the Diocese of Sacramento and the norms of canon law.
- C. When a single act of sexual abuse of a minor by Diocesan Personnel is admitted or is established after the process described herein, in accordance with canon law, the offending party shall: (1) if a member of the clergy, be removed permanently from ecclesiastical ministry; (2) if a lay employee, be dismissed from employment and permanently barred from future employment with the Diocese and from participating in any ecclesiastical ministry of the Diocese in the future; or, (3) in the case of a volunteer, be permanently barred from any future volunteering or employment with the Diocese, and from participating in any ecclesiastical ministry of the Diocese in the future.



## V. REPORTING

- A. These Policies and Procedures are complementary to the Child Abuse and Neglect Reporting Act, California Penal Code Sections 11164 *et seq.* All Diocesan Personnel who are mandatory reporters pursuant to Penal Code Section 11165.7 shall fully comply with all applicable provisions of the Act. Any questions regarding the applicability, requirements, provisions, or mandated reporting procedures should be directed immediately to the Diocesan legal counsel.
- B. Whether or not an incident is subject to mandatory reporting to a government agency under California law, the Diocese requires all Diocesan Personnel to internally report any suspected incidents of Sexual Misconduct to the Diocese pursuant to this Policy.
  - 1. Persons Required to Report: All Diocesan Personnel who suspect, witness, or otherwise become aware of any incident of Sexual Misconduct involving Diocesan Personnel must immediately report such information to the designated diocesan official, as set forth below in Subparagraph 3, pursuant to this Policy. Failure to report such incidents of Sexual Misconduct shall constitute grounds for discipline under the applicable policies and procedures pertinent to the respective Diocesan Personnel.
  - 2. Reports by Third Parties: Any other person or entity may report incidents of Sexual Misconduct to the Diocese as specified in Subparagraph 3 below. Any person who has any information pertaining to, or knowledge of, Sexual Misconduct involving Diocesan Personnel is strongly encouraged to report such matters immediately. The Diocese shall handle such reports sensitively, confidentially, and compassionately.
  - 3. To Whom Reports Are to be Made: A report of Sexual Misconduct may be made to the following persons:
    - a. Alleged or suspected incidents of Sexual Abuse involving clergy (i.e., bishops, priests, and deacons) should be reported to the Priests' Personnel Director or the Bishop's Delegate;
    - b. Alleged or suspected incidents of Sexual Abuse involving diocesan lay employees or volunteers, including parish employees and volunteers, should be reported to the Director of Lay Personnel;
    - c. Alleged or suspected incidents of Sexual Abuse involving employees or volunteers at all diocesan primary and secondary schools should be reported to the Superintendent of Catholic Schools or the Director of Lay Personnel; and,
    - d. Alleged or suspected incidents of Sexual Abuse involving members of religious institutes (i.e., religious order priests, religious brothers, and

religious sisters) should be reported to the Delegate for Religious or the Priests' Personnel Director.

- e. Alleged or suspected incidents of Sexual Abuse involving Diocesan seminarians should be reported to the Vocations Director.

Individuals who desire to report incidents of alleged or suspected Sexual Abuse by Diocesan Personnel may also, at their option, report such incidents to the Bishop's Delegate, or to the Pastoral Care Coordinator.

- 4. Contents of Report: Reports of Sexual Misconduct may be verbal or written (written reports are preferred) and shall include sufficient information to permit the Diocese to respond to the report. Accordingly, the reporting party should attempt to provide as much information as is available, such as the name, position, and any other information identifying the person or persons concerning whom the complaint is being made; a description of the nature of the misconduct involved; the date, time, and place of the alleged incident; the name and means of contacting the person providing the information and the name(s) of any witnesses and the means of contacting those witnesses; and any other information that might serve to corroborate the allegation.

## **VI. RESPONSE TO REPORTS**

- A. Under these Policies and Procedures, the Diocesan Bishop's response to reports of Sexual Misconduct is intended to be both pastoral and administrative. In order to fulfill his pastoral responsibilities, the Diocesan Bishop has established a Diocesan Office of the Pastoral Care Coordinator, which shall be under the general supervision of the Moderator of the Curia, and which shall carry out the Diocese's Pastoral Care Response, as set forth below.
- B. In order to fulfill his administrative responsibilities, the Diocesan Bishop has also delegated to the Bishop's Delegate the responsibility to coordinate and conduct the diocesan Administrative Response to reports of Sexual Misconduct, including supervising investigations into allegations, making appropriate reports to the civil authorities, and coordinating personnel actions with other appropriate officials, such as the Director of Priest Personnel, Vicar for Deacons, Delegate for Religious, the Director of Lay Personnel, and the Superintendent of Catholic Schools, as set forth in more detail below.
- C. *Pastoral Care Response*: The nature and extent of pastoral care that will be extended under this policy shall be supervised by the Bishop's Delegate, in consultation with the Pastoral Care Coordinator and the Moderator of the Curia. Pastoral care is provided in accordance with the teachings and canons of the Roman Catholic Church and the directives of the Diocesan Bishop. The Diocesan Bishop shall have sole discretion to determine whether particular Pastoral Care programs conform to Roman Catholic religious belief and are in accordance with Roman Catholic religious teaching. The Diocesan Bishop shall also have sole discretion to establish eligibility criteria for pastoral

care programs and for the duration of such pastoral care services depending upon the needs of the participants and the availability of financial resources to fund such pastoral care. Pastoral care, as understood in this policy, may include, as appropriate, reasonable psychiatric care, psychological counseling, spiritual direction, pastoral counseling, and such other clinically-sound mental health care as the circumstances reasonably warrant.

D. *Administrative Response:*

1. At the earliest possible opportunity following the receipt of a report of Sexual Misconduct, the Diocesan Bishop will make a preliminary determination concerning probable cause, based on the information made available to him at that time. “Probable cause” in this context is defined as a suspicion founded upon circumstances sufficiently strong to warrant a reasonable person to believe that the allegation is true. A determination of the existence of probable cause is not a final determination of the fact. It is only a threshold determination that there is sufficient credible information to require additional administrative action to be taken. The Diocesan Bishop shall have the sole and exclusive discretion to determine whether probable cause exists with regard to allegations of Sexual Misconduct by Diocesan Personnel. If the Bishop determines that probable cause exists concerning the reported misconduct, he will then direct that a complete investigation be conducted, under the supervision of the Bishop’s Delegate, as to whether it is more likely than not that the accused Diocesan Personnel member has engaged in an act or acts of Sexual Misconduct.
2. Where the Diocesan Bishop makes a preliminary administrative determination that there is probable cause to believe that an act of Sexual Misconduct may have been committed by Diocesan Personnel, he will also immediately take necessary appropriate action to prevent any further acts of Sexual Misconduct by the accused person, in accordance with civil and canon law. Such action may include, but not be limited to, placing the accused person on administrative leave and withdrawing permission to engage in acts of ministry. In making his determination of probable cause, the Diocesan Bishop may, as he deems appropriate, consult with other persons, including the Independent Review Board, the Bishop’s Delegate, the Director of Lay Personnel, the Superintendent of Catholic Schools, and the General Counsel for the Diocese. The Bishop’s Delegate shall inform all concerned parties about the policies and procedures of the Diocese regarding the Diocese’s administrative response to the allegation of Sexual Misconduct and shall assist both the complainant and accused in securing appropriate pastoral and administrative assistance with regard to the process.
3. If the Diocesan Bishop determines that there is probable cause to believe Sexual Misconduct may have occurred, then the accused person shall be notified of that determination and of the Diocesan Bishop’s intent with regard to administrative or penal action in accordance with the norm of canon law. If the determination of the Diocesan Bishop is to proceed administratively in accordance with canon law, administrative action shall commence pursuant to Section VI of these Policies and

Procedures. If the determination of the Diocesan Bishop is to proceed penally in accord with canon law, the accused person shall be so advised and the matter shall be promptly referred to the Promoter of Justice for appropriate action under the norms of canon law.

4. If the Diocesan Bishop determines that there are insufficient facts to support a finding of probable cause that a Diocesan Personnel member has engaged in an act of Sexual Misconduct and that there is no basis upon which to undertake further administrative action, both the accused person and the complainant shall be promptly notified of the Diocesan Bishop's decision and, if appropriate, any other action to be taken by the Diocese.
  5. When the allegation of Sexual Misconduct pertains to the sexual abuse of a minor by a priest, deacon, or member of a religious institute, a preliminary investigation in accordance with canon law will be initiated and conducted promptly and objectively. During the investigation the accused enjoys the presumption of innocence, and appropriate steps shall be taken to protect his or her reputation during the pendency of the investigation. The accused will be encouraged to retain the assistance of civil and canonical counsel and will be promptly notified of the results of the investigation. When there is sufficient evidence that sexual abuse of a minor by a priest or deacon has occurred, the Congregation for the Doctrine of the Faith, and if appropriate the Congregation for Institutes of Consecrated Life, shall be notified according to the norms of canon law and the directives of the Holy See regarding such matters. The Diocesan Bishop shall then withdraw the accused from exercising the sacred ministry or any ecclesiastical office or function, impose or prohibit residence in a given place or territory, and prohibit public participation in the Most Holy Eucharist pending the outcome of the canonical process. The alleged offender may be requested to seek, and may be urged to voluntarily comply with, an appropriate medical and psychological evaluation at a facility as directed by the Diocesan Bishop. When even a single act of sexual abuse of a minor by a priest or deacon is admitted or is established after an appropriate process in accordance with the norms of canon law, the offending priest or deacon will be removed permanently from ecclesiastical ministry, and may be dismissed from the clerical state, if the case so warrants.
- E. In the case of Sexual Misconduct involving minors, the Diocese shall fully comply with the California Child Abuse and Neglect Reporting Act (California Penal Code § 11164 *et seq.*). Any uncertainties or ambiguities regarding applicability of mandated reporting laws shall be resolved in favor of reporting suspected incidents of child abuse to the appropriate child protective agency. The Bishop's Delegate shall ensure that the mandated reporter timely makes a written report is made in the legally prescribed manner to the appropriate child protective agency in accordance with the Act. The Bishop's Delegate shall, with the advice of the Diocese's General Counsel, fully cooperate with the District Attorney's Office, the local police or sheriff's department, or such other public agencies as may have jurisdiction to act under state or federal law.

- F. The Bishop's Delegate will ensure that immediate contact is made with the alleged victim and/or family by the Pastoral Care Coordinator or other designated person(s) to ascertain if pastoral counseling is needed and/or if pastoral counseling will be accepted.
- G. It shall be the responsibility of the Bishop's Delegate to:
1. Supervise and oversee a thorough and impartial investigation of the allegations of Sexual Misconduct by Diocesan Personnel and ensure that adequate professional and investigative resources are utilized in a search for the truth as to such allegations;
  2. Coordinate with the Diocese's canonical advisors regarding advice for diocesan officials on the relevant provisions of canon law and implementation of these Policies and Procedures;
  3. Coordinate and consult with the Diocese's General Counsel regarding the applicability of mandated reporting laws and, where appropriate, the preparation and provision of mandated reports of suspected incidents of child abuse, notification as appropriate of pertinent law enforcement agencies, and such other legal issues as appropriate;
  4. Supervise the nature and extent of pastoral care that will be extended under this Policy, in consultation with the Pastoral Care Coordinator and the Moderator of the Curia;
  5. Provide assistance necessary to identify potential civil and canonical representation for any person accused; and,
  6. Supervise and coordinate efforts regarding notification of parishioners and the Catholic faithful regarding incidents of suspected child abuse that may have occurred in the respective parishes and/or institutions of the Diocese of Sacramento where the abuse is alleged to have occurred.
- H. It shall be the responsibility of the Pastoral Care Coordinator to:
1. Receive communications from individuals (in writing or via telephone) concerning reports of Sexual Misconduct;
  2. Provide assistance to complainants in setting forth a complaint of Sexual Misconduct or abuse to diocesan authorities in accordance with these Policies and Procedures;
  3. Prepare, in coordination with the Bishop's Delegate and the Moderator of the Curia, an appropriate pastoral care response, as warranted under the circumstances.

## **VII. DISCLOSURE / CONFIDENTIALITY**

- A. Information received in connection with allegations of Sexual Misconduct shall be maintained in a confidential manner. All such information shall be treated as sensitive and confidential and may be disclosed as follows:
1. Once the complainant and key witnesses have been interviewed, the Bishop's Delegate shall provide the accused person with information sufficient to enable the accused person to respond to the allegations of Sexual Misconduct made against him or her.
  2. The Bishop's Delegate shall, at the conclusion of the investigation and upon request, indicate to the person making the allegation of Sexual Misconduct whether the accused party has admitted or denied the allegation made against him or her.
  3. The Priests' Personnel Director (in the case of an accused priest (diocesan or religious)), the Delegate for Religious (in the case of religious men or women), the Vicar for Deacons (in the case of permanent deacons), the Director of Lay Personnel (in the case of employees and volunteers), the Diocesan Vocations Director (in the case of seminarians) and the Bishop's Delegate will provide the person making the allegation and the accused person with appropriate and timely information about the recommendations and actions taken with regard to the complaint.
  4. The General Counsel shall have access to all such information for purposes of ensuring compliance with mandated reporting laws, making appropriate reports to law enforcement agencies, complying with Diocesan insurance reporting requirements, and advising the Bishop of Sacramento regarding legal concerns associated with the allegations.

## **VIII. THE INDEPENDENT REVIEW BOARD**

- A. The Diocese shall have an Independent Review Board, which will function as a confidential consultative body to the Diocesan Bishop in discharging his responsibilities under this Policy. The functions of this board may include:
1. Advising the Bishop of Sacramento in his assessment of allegations of sexual abuse of minors and in his determination of suitability for ministry;
  2. Reviewing Diocesan policies for dealing with sexual abuse of minors;
  3. Offering advice on all aspects of these cases, whether retrospectively or prospectively, as well as such other matters of alleged clerical sexual misconduct when so requested by the Bishop of Sacramento.

- B. The Diocesan Bishop shall promulgate and publish a policy regarding the processes and function of the Independent Review Board, which policy shall govern the constitution, staffing, procedures, and responsibilities of the Independent Review Board.

## **IX. EDUCATION**

- A. The Diocese will conduct periodic in-service training of clergy, religious, lay employees and ministers, and volunteers who have regular contact with youth in the course of their work with the Church regarding Sexual Misconduct.
- B. A copy of these Policies and Procedures shall be disseminated on promulgation to all Diocesan entities, including all parishes, schools, social service organizations, and other ministries.
- C. All Diocesan Personnel shall receive a copy of these Policies and Procedures and sign an acknowledgment of receipt that shall be kept in the appropriate personnel file.

## **X. SAFE ENVIRONMENT MEASURES**

- A. The Diocese shall take all reasonable and appropriate measures, implement policies and procedures, and periodically review such policies and procedures to ensure that all Diocesan ministries and facilities are safe environments for persons of all ages and that those children and young people, in particular, are not placed at risk specifically with regard to physical or sexual abuse.
- B. In conjunction with these policies and procedures, the Diocesan Bishop has promulgated a Code of Pastoral Conduct containing conduct guidelines for Pastoral Counselors and Spiritual Directors, and a Volunteer's Code of Conduct.
- C. All Diocesan Personnel shall be required to submit to a background check prior to engaging in their ministry, employment, or volunteer work. For Diocesan Personnel who work at diocesan schools and have contact with minor pupils, or who work anywhere within the Diocese and have supervisory or disciplinary power over minors in his or her care, the background check shall include providing the Diocese with a complete set of fingerprints for submission to the California Department of Justice, except where an alternative background check is approved by the Diocesan Safe Environment Coordinator pursuant to the provisions of the Diocese's Fingerprint Guidelines and Procedures. Diocesan Personnel shall not engage in any activity involving contact with persons under the age of 18 years until the results of the California Department of Justice fingerprint check, or other approved background check, have been received by the Diocese and the person has been cleared for employment or participation as a volunteer.
- D. No person having a prior record of sexual crimes or crimes of violence shall be employed by, or permitted to participate in, the work of the Diocese. It shall be the policy of the Diocese that maintaining a safe environment in all Diocesan ministries and facilities shall

be given the highest priority. This policy shall be liberally construed when questions regarding suitability for employment and participation in Diocesan ministries arise.

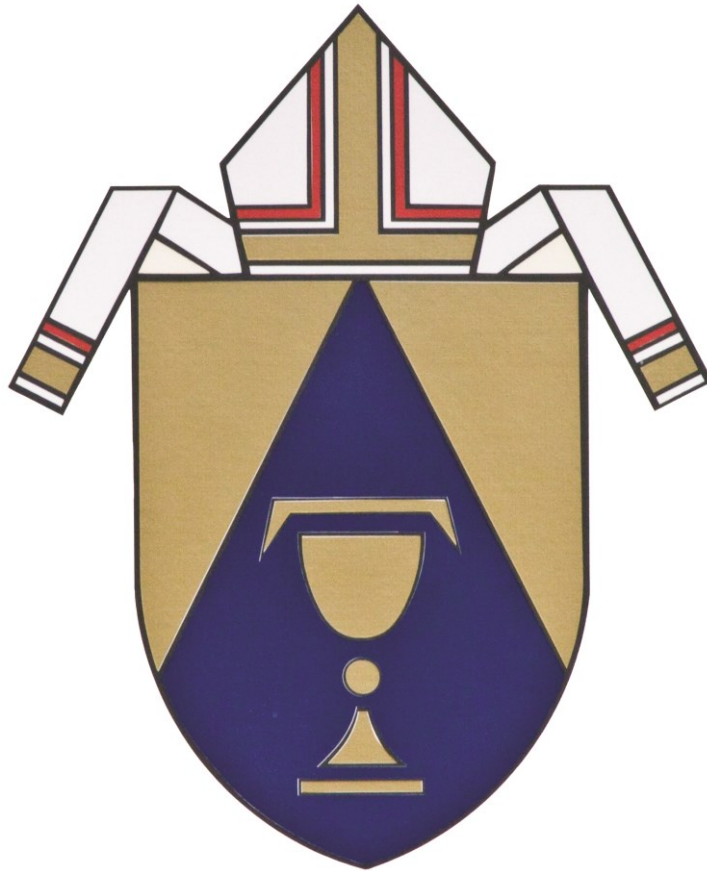
## **XI. CONCLUSION**

These Policies and Procedures set forth the Diocese of Sacramento's pastoral concern for those impacted by Sexual Misconduct by Diocesan Personnel and, as such, form the basis on which an immediate response can be made, a thorough investigation conducted, and administrative and pastoral responses carried out in a manner consistent with the Church's commitment to the care and protection of those entrusted to its care.



# APPENDIX VIII

## REMUNERATION OF PRIESTS IN ACTIVE MINISTRY



**Diocese of Sacramento**  
**Remuneration of Priests in Active Ministry**  
**July 1, 2016**

The Remuneration of Priests in active ministry is broken into four categories:

1. Compensation
2. Benefits
3. Reimbursements
4. Entitlements

Each category is unique with respect to its treatment for tax purposes. A detailed discussion of each follows.

1. ***Compensation*** is taxable and includes the following:

A. ***Base Compensation\*\****

<b>Yrs of Svc*</b>	<b>Pastor/Special Worker</b>	<b>Parochial Vicar</b>
0-3 yrs	\$30,210	\$27,470
4-6 yrs	\$30,550	\$27,620
7-9 yrs	\$30,870	\$27,800
10-12 yrs	\$31,200	\$27,970
13-15 yrs	\$31,540	\$28,120
16-18 yrs	\$31,850	\$28,290
19-21 yrs	\$32,200	\$28,460
22-24 yrs	\$32,520	\$28,620
25-27 yrs	\$32,850	\$28,770
28-30 yrs	\$33,180	\$28,960
31-33 yrs	\$33,510	\$29,110
34-36 yrs	\$33,840	\$29,270
37-39 yrs	\$34,170	\$29,460
40-42 yrs	\$34,500	\$29,610
43-45 yrs	\$34,820	\$29,760
46-48 yrs	\$35,160	\$29,960
49-51 yrs	\$35,490	\$30,110

\* “Yrs of Svc” refers to years of service in the Diocese of Sacramento. *(Note that once a Priest is incardinated into the Diocese of Sacramento, years of service is calculated from ordination date.)*

\*\* **Base Compensation is to be reduced by \$5,603 per year for a Priest who uses a parish car in ministry.**

**B. *Stipends***

Canonical and theological doctrines define stipends as free gifts offered on occasions of pastoral ministry.

**Mass Offerings & Funeral Offerings**

**Tier I** - The Priest retains stipends for Mass and Funeral offerings. Under this method the stipends are not included on a Priest's Form W-2, and therefore, he is responsible for the reporting of stipend income on his tax return.

-or-

**Tier II** - The Priest turns in stipends for Mass and Funeral offerings, and in lieu thereof, receives a guaranteed fixed amount of \$300 per month which is included on Form W-2.

Also see "Assignment of Stipends" (Schedule "A")

**2. *Benefits* are non-taxable.**

**A. *Health Insurance.*** Source of income pays the premium at cost.

**B. *Defined Benefit Pension Plan.*** Source of income pays the Priests Pension Plan premium at cost.

**B. *Vision Insurance.*** Source of income pays the premium at cost.

**C. *Dental Insurance.*** Source of income pays the premium at cost.

**D. *Annual Vacation Time.***

Priests 60 and under: 4 weeks (to include 4 Sundays)

Priests 61 and over: 6 weeks (to include 6 Sundays)

Priests 70 and over: 8 weeks

Foreign-born priests (traveling to visit family in Europe, Mexico, and Central America): In addition to the stated canonical vacation of one month, 4 extra days are granted for travel to and from destination (that is, 2 extra days outward bound and 2 extra days for the return journey).

Foreign-born priests (traveling to visit family in Africa, Asia, and South America): In addition to the stated canonical vacation of one month, 7 extra days are granted for travel to and from destination, qualified as in the provision for Europe, Mexico, and Central America.

(N.B. These extra days are given for the purposes of travel and are not intended to extend the vacation period.)

A senior priest, especially one in the mountain or rural parish, may request from the Diocesan Bishop permission to take some additional time away from the parish under special circumstances, e.g. health, harsh climate, need to spend time with family, etc.

- E. **Day Off.** One day per week is understood as 24 hours. The priest is authorized to take a few days off after Easter and Christmas, but not to extend over a weekend.

3. **Reimbursements** are generally non-taxable amounts paid to reimburse the Priest for certain expenses incurred in performing his ministry. These include the following:

- A. **Gasoline.** Source of income pays for gasoline used in the course of ministry.
- B. **Auto Insurance.** For a priest owning his own vehicle, source of income will reimburse the actual cost of insurance, not to exceed \$1,750 per fiscal year. Coverage limits must be the minimum requirement as detailed in Attachment "C". *(A portion of this reimbursement may be taxable to the extent that the auto is used for personal use.)*
- C. **Annual Diocesan Retreat.** Source of income reimburses at cost.
- D. **Continuing Education.** Source of income reimburses up to a maximum \$ 1,000 per fiscal year. This is construed to be theological continuing education; e.g. Priests Study Days. If a question arises as to the legitimacy of a particular educational expense, it is to be resolved by the priest in charge of Continuing Education in the Diocese. Documented receipts must be provided for parish or other source of income records.
- E. **Dry Cleaning.** Source of income reimburses documented expenditures for dry cleaning of clerical attire.

#### **4. Entitlements** (See Schedule "B" attached.)

##### ***Reminders:***

- ☐ It is important that all reimbursements or bills paid on behalf of the Priest be supported by adequate documentation.
- ☐ Taxable income results from personal use of a parish-owned vehicle. A sample worksheet used to calculate the value of personal use is attached as Attachment "D".

## **SCHEDULE - A**

### **Assignment of Stipends**

Canonical and theological doctrines define stipends as free gifts offered on occasion of pastoral ministry.

#### **1. All Souls**

Provisions made in the Diocesan Statutes remain in effect.

The provisions state that All Souls offerings are not Mass stipends but alms offered on the occasion of requesting remembrance of a person's deceased relatives and friends, nevertheless the priest(s) are to offer several Masses for the dead according to the intentions of the donors. In 1988, the Priests Council recommended to the Bishop that each priest be obliged in charity to offer within a year one Mass for every sum of \$20 he has received from the All Souls offerings. The Bishop approved this recommendation.

All Souls offerings are to be divided among the priests living in the rectory, including priests in residence. If a portion is given to priests in retirement and/or the Missions, this is to be decided jointly by the priests living in the rectory.

#### **2. Baptisms**

The offering given at baptism goes to the parish.

If a gift, over and above the parish offering is made freely and spontaneously to the officiating cleric, he may keep it.

If a cleric solicits an offering in any way, directly or indirectly, he is abusing the Sacrament of Baptism. Such monies should, in good conscience, be passed on to the parish.

Pastors are not at liberty to designate a particular sum of the offering to be given to the cleric.

#### **3. Marriages**

The offering or fee given for marriage goes to the parish.

If marriage is celebrated during Mass, the celebrant is to be given the standard Mass stipend (\$10), taken out of the offering given.

## **SCHEDULE - A**

### **Assignment of Stipends - *Continued***

If a gift, over and above the parish fee (for use of the church etc.) is made freely and spontaneously to the officiating cleric, he may keep it.

If a cleric solicits a gift in any way, directly or indirectly, he is abusing the Sacrament of Matrimony. Such monies should, in good conscience, be passed on to the parish.

#### **4. Quinceaneras**

Offerings are to be treated in the same way as offerings for weddings. (See no. 3 above.)

#### **5. Blessings of Homes, Other Buildings or Automobiles**

Offerings made on the occasion of the blessing of a home, any other building or automobile go to the parish.

Clerics are prohibited from soliciting, directly or indirectly, any offering on such an occasion.

#### **6. Mass Stipends and Funeral Offerings**

Priests are given the choice of selecting from a two tier method (See *Remuneration of Priests in Active Ministry, I. Wages, B. Stipends*).

The stipend for Mass has been determined at the Provincial level in the amount of \$10.

#### **7. Mass Bination Stipends**

Canon 951 ' 1 states, "A priest who celebrates Mass more than once on the same day may apply the individual Mass for the intention for which the offering is made, but with the law that, except on Christmas, he may retain the offering for only one Mass, giving the other offerings to purpose prescribed by the ordinary ..... The Bishop has designated the Diocesan Seminarian Fund as recipient of bination stipends to be deposited on a quarterly basis at the Diocesan Finance Office.

## **SCHEDULE - B**

### **Entitlements**

The following entitlements are to be seen as a supplement to the existing compensation schedule for priests in active ministry.

#### **1. Meals**

- a) The ordinary expectation for priest(s) living in a rectory is that 3 meals a day be provided, with at least the main meal prepared and served.
- b) It should be the ordinary practice that the priests living together in a rectory should eat at least the main meal in common.
- c) Meals need to be healthy and wholesome. Consideration of likes and dislikes of foods served ought to be decided in common.
- d) When meals are not provided for in the rectory, reimbursement is paid by source of income to priest having to dine in a restaurant. Receipts for reimbursement must be submitted to parish.
- e) When meals are eaten outside the rectory on a priest's day off or when meals are provided in the rectory yet a priest chooses to eat at a restaurant, the expenses are the responsibility of the individual priest.

#### **2. Telephone**

Priests living in a rectory may be reimbursed up to \$75 per month from their source of income for the cost of personal, long distance calls. (Above this allowance, the individual priest is required to reimburse the parish.)

#### **3. Wine and other alcoholic beverages**

It is suggested that each parish maintain a cabinet which the priests of the house may use in moderation, including when they have personal visitors. Anything over and above this is the responsibility of the individual priest himself.

#### **4. Animals and Pets**

The food and care of pets which a priest keeps are the responsibility of the individual priest himself. The priest may be required to pay the Parish for the cost of damages done to the rectory by his pet.

#### **5. Television/Computer/Internet**

- a) Each house is to have a television set and a VCR/DVD that are accessible to the priests of the house in common.



## **SCHEDULE - B**

### **Entitlements - *Continued***

- b) Each rectory will provide for each priest living in the rectory basic cable TV and Internet access into the quarters of each priest at parish expense.
- c) Pastor and Parochial Vicar will be provided by the parish with a computer for ministerial work.
- d) All other electronic equipment/appliances are the responsibility of the individual priest himself.

#### **6. Expenses for Athletic Activities, Recreational and Social Clubs and Associations**

- a) Athletic equipment is the responsibility of the individual priest himself.
- b) Health club memberships and the like are the responsibility of the individual priest himself.
- c) All other club membership, fees, and dues for recreation, sports and social groups are the responsibility of the individual priest himself.

#### **7. Furnishing and Maintenance of Quarters for a Priest**

- a) Individual priest quarters need to be cleaned regularly by a housekeeper.
- b) Painting of quarters on a regular basis (particularly at the time of the arrival of a newly assigned priest).
- c) Furniture should be adequate and comfortable in each suite.
- d) Carpeting drapes and mattress should be replaced and/or cleaned on a regular basis.
- e) The parish is to maintain an inventory of the furniture that belongs to the Parish. It is recommended that the individual priest himself maintain an inventory of the furniture which belongs to him.

#### **8. Laundry**

Ordinary laundry service is provided by the Parish.

#### **9. Medications/Prescriptions**

Medications for priests are covered by the health insurance afforded the priests by the diocese. The deductible set by the insurance is the responsibility of the individual priest himself.

## **SCHEDULE - B**

### **Entitlements - *Continued***

#### **10. Personal Books and Magazines**

Books and professional magazines used in the course of ministry for educational enhancement are provided for by the educational allowance as set out in the *Remuneration of Priests in Active Ministry, 3. Reimbursements, D. Continuing Education*. All other cost for personal interest books and magazines are the responsibility of the individual priest himself.

#### **11. Tobacco Products**

Costs are the responsibility if the individual priest himself.

#### **12. Pilgrimage**

From time to time a priest may request special permission from the Diocesan Bishop to be absent from the diocese, in addition to his absence for vacation, in order to lead a pilgrimage group. This permission may not be requested more often than once every three years.

The amount of time allowed will be directly related the destination of the pilgrimage. For shrines in the Americas or the Philippines one week will be granted. For shrines in Europe or the Holy Land two weeks will be granted.

The priest who provides supply during the absence of the priest on pilgrimage must be approved in good time beforehand by the Personnel Director for Priests. The priest going on pilgrimage must himself obtain the services of the priest who provides supply. The stipend for the supply priest is the expense of the Parish/Institution.

**(If an irregularity is discovered regarding the compensation of a priest, justice would require that reimbursement be made to the Parish.)**

## **Attachment - C**

### **Diocese of Sacramento Stipends for Supply Priests**

The following stipends are recommended for supply priests:

**Weekend Masses:** \$50 per Mass

**Weekday Masses:** \$15 per Mass

#### **Vacation/Sabbatical/Pilgrimage Coverage:**

- a) A priest from within the diocese is compensated by the parish as follows:  
The monthly rate of a parochial vicar (or pro-rated for days per month), Years of service in the diocese (or pro-rated for days per month), and automobile allowance (or pro-rated for days per month).
- b) A priest from outside the diocese receives the same compensation as above, as well as reimbursement for travel expenses in an amount arranged beforehand with the pastor.

#### **Confessions and/or Penance Service**

- a) When a priest provides weekend supply, he is asked to make himself available for confessions as part of his supply ministry. He receives no additional compensation.
- b) When a priest participates as a confessor at a Penance Service, he does not ordinarily receive compensation. This is seen as part of his priestly ministry.

#### **Mileage**

The parish of supply is responsible for reimbursing the priest for mileage from and to his place of residence. (The current rate is \$ 0.575 cents per mile.)

## **Attachment - D**

### **Required Coverage For A Priest Using His Own Vehicle For Ministry**

Reimbursement of the insurance premium for a Priest using his own vehicle for ministry is subject to meeting the following coverage requirements:

1. The *Roman Catholic Bishop of Sacramento and the Pastor of (name of parish) a corporation sole*, should be named on the policy as additional insured.

2. Coverage must meet or exceed the following limits...

Bodily injury/property damage (per accident)	\$500,000
Medical payments	\$25,000
Uninsured motorist bodily injury	\$100,000
Uninsured motorist property damage	\$100,000

## Attachment E

### Valuation For Personal Use Of Employer Supplied Vehicle

The Internal Revenue Service requires all employers to add to Form W-2 or Form 1099-Misc, a valuation for personal use of employer supplied vehicles. The Diocese has adopted the lease valuation method to establish the value of the personal use of an employer supplied vehicle. The valuation is a product of the Annual Lease Value of the vehicle times the Percentage of Personal Use.

The "Annual Lease Value" is determined from an IRS table which is printed on the reverse side of this page.

The "Percentage of Personal Use" should be determined by the individual using the vehicle. The calculation is as follows:

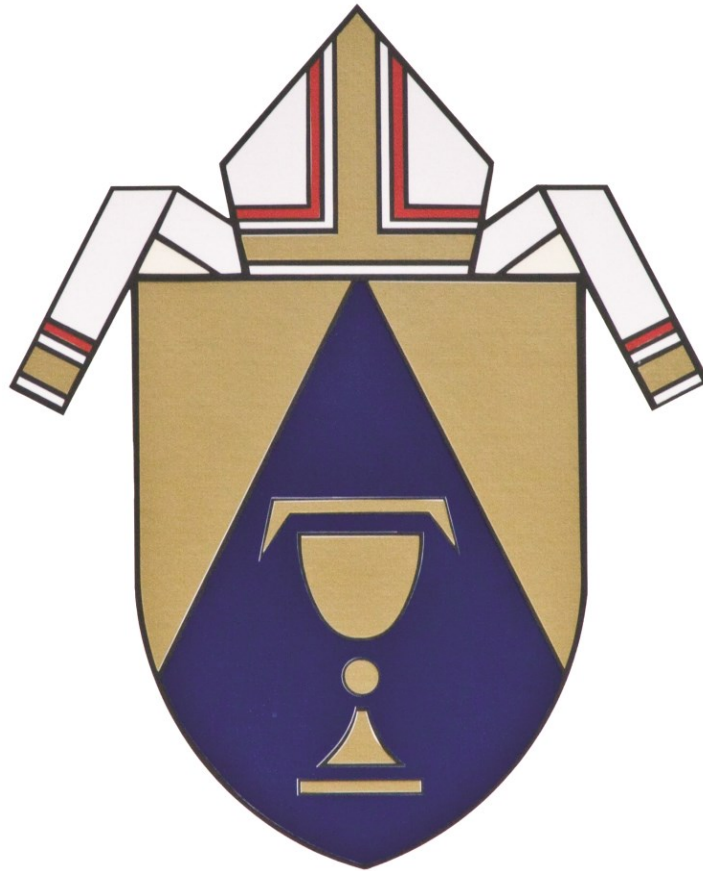
Vehicle Year and Make

Estimated value as of December 31	\$
Annual lease value from table A (see reverse side of this page)	\$
Percentage of personal use    B	x _____%
Value to be added to Form 1099-Misc or Form W-2    A x B	= \$

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# APPENDIX IX

## RECTORY INSPECTION CHECKLIST



## **Rectory Inspection Checklist**

### **Diocese of Sacramento**

The Priests Personnel Policy, paragraph 2.3.6.2 states: “At the time of a transition of pastors, the Episcopal Vicar for Clergy will provide a checklist of items to be reviewed and taken care of by the departing pastor prior to the arrival of the new pastor (see Appendix, Item IX). This checklist should also be reviewed by a member of the parish finance council. These items include a review of inventory, cleaning of carpets and drapes, any necessary painting or repairs, ensuring that plumbing and utilities are in working order, making sure that appliances are clean and in working order, and that cupboards, closets and rooms are cleared of unnecessary clutter. Special attention is to be paid to kitchens and bathroom and to any rooms damaged by smoking or pets. If a rectory is kept in good condition, these transition items should be minor.”

This checklist is provided in order to assess the physical condition of the rectory. The inspection of the rectory should be done in the presence of the chairperson or other member of the Parish Finance Council. Both the Pastor (or Parochial Administrator) and finance council member should sign the form, make a copy for the parish records and send the completed form to the attention of the Episcopal Vicar for Clergy. This assessment should be completed before the Pastor or Parochial Administrator vacates the rectory.

Please note these specific instructions for completing the form:

- Please mark each line, using explanatory language, such as “Excellent, Good, Fair or Poor.”
- If you mark “Fair” or “Poor” for a particular item, please explain what would improve its condition by describing the required repair work, for example: needs paint, repair water leak in ceiling, carpet needs replacing.
- If a particular line item is not applicable, please write: N/A

Parish Name: \_\_\_\_\_

Rectory Address: \_\_\_\_\_

Inspection Date: \_\_\_\_\_

Inspection Type: [   ] Move-In   [   ] Move-Out   [   ] Routine



ITEM	CONDITION (please describe any damage or defects)
------	---

**LIVING ROOM**

Walls	
Ceiling	
Flooring	
Doors & Locks	
Windows	
Curtain & Blinds	
Lighting	
Electrical Fixtures	
Heating & Cooling	
Others	

**KITCHEN**

Walls	
Ceiling	
Flooring	
Doors & Locks	
Windows	
Lighting	
Electrical Fixtures	
Cabinet Fixtures	
Counter Tops	
Sink	
Stove, Hood & Oven	
Refrigerator	
Dishwasher	
Others	

**BDRM/SUITE 1**

Walls

Ceiling

Flooring

Doors &amp; Locks

Windows

Curtain &amp; Blinds

Lighting

Electrical Fixtures

Heating &amp; Cooling

Storage &amp; Shelving

Others

**BDRM/SUITE 2**

Walls

Ceiling

Flooring

Doors &amp; Locks

Windows

Curtain &amp; Blinds

Lighting

Electrical Fixtures

Heating &amp; Cooling

Storage &amp; Shelving

Others

### **BDRM/SUITE 3**

Walls

Ceiling

Flooring

Doors & Locks

Windows

Curtain & Blinds

Lighting

Electrical Fixtures

Heating & Cooling

Storage & Shelving

Others

### **BATHROOM 1**

Walls

Ceiling

Flooring

Doors & Locks

Windows

Lighting

Wash Basin

Shower & Bathtub

Toilet & Plumbing

Mirrors

Cabinet Fixtures

Others

## BATHROOM 2

Walls

Ceiling

Flooring

Doors & Locks

Windows

Lighting

Wash Basin

Shower & Bathtub

Toilet & Plumbing

Mirrors

Cabinet Fixtures

Others

## MISCELLANEOUS

Smoke Detectors

Fire Extinguishers

Stairs

Hallways

Deck, Patio &

Balcony

Garage

Garden & Lawn

Parking Area

Others

Pastor/PA Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Finance Council Chair Name: \_\_\_\_\_  
(Or other finance council representative)

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Diocesan Official: \_\_\_\_\_

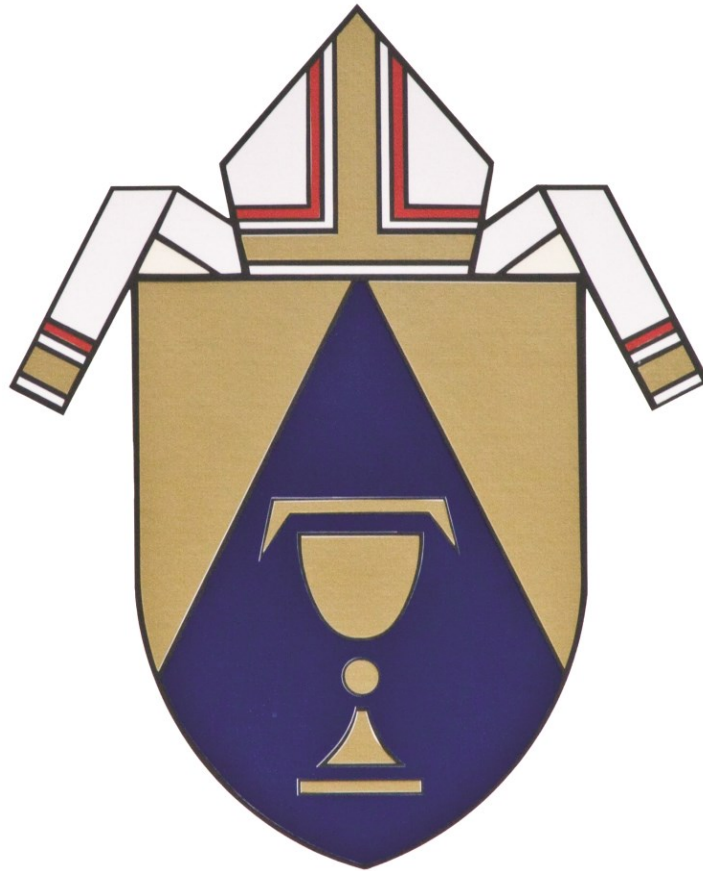
Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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# APPENDIX X

## SABBATICAL GUIDELINES



# **SABBATICAL GUIDELINES**

## **For the Diocese of Sacramento**

1. The priest is primarily the spiritual leader of the parish. In that capacity he is encouraged to continue his personal, spiritual and professional growth. In fact, he has a responsibility to his superiors and peers and above all, to the people he serves to grow in grace and knowledge. In return, he has the right to be supported by the diocese, his peers and the people he serves.
2. Programs for continuing formation support the spiritual leadership of the priest's ministry. The experience of continuing education is better when the presbyterate gathers together, especially at times on its own. The following programs are available to priests:
  - a) Diocesan general retreat
  - b) Private retreats, e.g., eight-day or thirty-day styles
  - c) Diocesan study week
  - d) Days of recollection
  - e) Diocesan workshops
3. Attendance is expected at the diocesan retreat. At least every second year, a priest shall attend the diocesan retreat. Even priests for whom English is a second language are expected to attend the diocesan priests' retreats. The gathering of the whole presbyterate with the bishop is important. In addition to the retreat, other forms of prayer experiences are encouraged throughout the year.
4. To accommodate the priests' attendance at retreats and study days, service to the parish requires appropriate planning and adjustments to schedules, i.e., prayer services to substitute for daily Mass.
5. Continuing education programs for priests may be open to deacons, sisters, brothers and the laity at the discretion of the Director of Continuing Education for Priests, who implements the programs approved by the Board of Continuing Education for Priests. Also, priests are encouraged to attend other education programs with the laity throughout the year. These opportunities promote a spirit of collaboration.
6. The Vicar for Priests assists with the supervision of priests in the diocese as defined by the Bishop of Sacramento. The Vicar must be seen as an advocate for priests. The bishop may appoint a personnel director for priests who will assist priests in every way possible but will also hold priests accountable for their responsibilities.



## **Short Term/Extended Study**

1. The diocese has need for priests professionally trained for particular ministries. In selecting and training priests for these ministerial positions, both the needs of the church and the personal wishes and abilities of the priests will be considered.
2. For the purpose of addressing diocesan needs, and after appropriate consultation with the Board of Continuing Education for Priests, Director of Continuing Education for Priests, and the Diocesan Personnel Board, the bishop will assign a priest for extended study. This may entail the pursuit of a full-time program in an accredited institution, e.g., masters or doctoral program.
3. The Diocese of Sacramento will provide opportunities for ongoing formation and development. These include the study days for priests, New Pastors' Workshop, cultural and language programs, institutes, provide short-term studies, and sabbaticals. Additionally, priests are invited to a variety of short term programs which are maintained by the directors of various diocesan offices, e.g., program for newly ordained and preparation for retirement.
4. All priests involved in active ministry are entitled to receive from their source of income reimbursement for up to \$400 a year for their continuing education in books, magazine subscriptions, or for non-diocesan programs.
5. In addition, the costs for the study days for priests and the diocesan retreat are to be paid by the priest's source of income.
6. An up-to-date file on each priest's continuing education will be maintained by the Diocesan Personnel Director for Priests.
7. The Diocese of Sacramento will provide for cultural and language programs for priests so that their communication skills will be adequate for ministry. This includes priests of all languages and cultures.

## **Sabbaticals**

1. A sabbatical is defined as an extended period of time away from the priest's ordinary duties during which he participates in program designed to foster his theological, spiritual and personal growth as well as his ministerial skills.
2. Any priest incardinated in the Diocese of Sacramento may claim three to four months sabbatical time, subject to the needs of the church and the diocese, for each seven years of service in the diocese.
3. Sabbaticals ordinarily are taken during an assignment and apart from the transition time between parish assignments or when a priest is newly assigned to a parish. Experience has shown that the conclusion of the sabbatical is filled with anxiety for the priest who has an uncertain future. In addition, the first three years of an assignment are important for settling in and for a parish to build a sense of security with a new pastor. Any exception to this guideline is to be worked out by the priests seeking a sabbatical and the Director of Continuing Education for Priests.

4. In order to assure that every priest has the opportunity of a sabbatical, the Diocese of Sacramento will set up a Sabbatical Fund to help these priests from parishes that cannot financially afford the expenses of a sabbatical.

### **Application Process for Study**

The following process shall be observed for priests requesting extended or sabbatical leave.

1. The priest consults with the director of Continuing Education for Priests.
2. In order to provide a smooth process for the planning of a sabbatical, the priest submits a written application to the Director of Education for Priests at least twelve months prior to the beginning of the desired program. Deadlines for submitting applications should be during the month of January of any given year.
3. Ordinarily, the priest applicant, along with the Personnel Director, work to identify a competent replacement for the period of the leave. A cooperative spirit in the presbyterate is encouraged regarding coverage of essential pastoral duties during the absence of a priest on extended study or sabbatical.
4. The Director of Continuing Education of Priests makes a recommendation to the Bishop for final approval.
5. The Director of Continuing Education of Priests informs the Priests' Personnel Board and Priests' Personnel Director.

### **Financial Support for Approved Study**

1. Extended Study: The Diocese of Sacramento assumes responsibility for all expenses incurred during the course of study. Extended study regulations also pertain to the New Pastors Workshop, the study of English, Spanish, and other essential languages that are required for ministry.
2. Sabbatical for an Incardinated Priest: The diocesan portion of a sabbatical for an incardinated priest consists of the cost of the programs itself, health insurance, allotments for automobile insurance and social security. The parish assumes responsibility for the priest's salary while he is away, as well as the salary of the priest's replacement. The priest himself is responsible for all travel costs.
3. Sabbatical Funding: The policy for sabbatical funding of approved study does not include emergency or unplanned leaves. The bishop can grant unplanned leaves at his discretion. However, the funding of such leaves is the responsibility of the bishop and is not included in the budget for continuing education of priests.

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# APPENDIX XI

## DIOCESAN DIRECTIVES CONCERNING THE OFFICE OF DEAN OR VICAR FORANE



**DIOCESAN DIRECTIVES**  
**CONCERNING**  
**THE OFFICE OF DEAN OR VICAR FORANE**

1. To be eligible for appointment as dean a priest must satisfy the following conditions:
  - (i) He is to have an assignment to pastoral work within the deanery.
  - (ii) He is to be engaged in active ministry.
  - (iii) His primary assignment must be a formal and permanent one, authorized by the Diocesan Bishop, to work in a parish or particular ministry of a pastoral nature, e.g. campus ministry, hospital chaplain, prison chaplain, school chaplain.
2. The dean is appointed by the Diocesan Bishop. Ordinarily, he does so from a list of three priests; drawn up, in order of preference, in accordance with the will of the priests of the deanery expressed through a consultation by secret poll.
3. The consultation of the priests in a deanery shall be conducted by the Office of the Diocesan Bishop.
4. To be eligible to take part in the consultation mentioned in 2 and 3 above, a priest must satisfy the following conditions:
  - (i) He is to have an assignment to pastoral work within the deanery.
  - (ii) If he is engaged in active ministry, his primary assignment must be a formal and permanent one, authorized by the Diocesan Bishop, to work in a parish or a particular ministry.
  - (iii) If he is retired, he must be an incardinated priest of the diocese.
5. Each participant in the consultation mentioned in 2 and 3 above shall name three eligible priests in order of preference.
6. The list of priests to be submitted to the Diocesan Bishop as provided in 2 above shall be compiled in accordance with the preference expressed in the consultation.
7. The term of office for a dean shall be three years, and is renewable.
8. If, during his term of office as dean, a priest is assigned to a new residence outside the territory of the deanery, he shall cease to be dean on the effective date of his new assignment.

9. The primary duty of a dean shall be that set out in Canon 555§1,1\_ of the Code of Canon Law, namely, “to promote and coordinate the common pastoral activity within the vicariate.”
10. As principal means to the end set out in 9 above, the dean shall convene a meeting of all the priests resident within the deanery at least twice a year to discuss common pastoral needs and problems, and to propose and implement a pastoral response in common to them.
11. A dean’s apostolate of service to his fellow priests must be distinguished, above all, by his efforts to foster the spirit of priestly fraternity by every means at his disposal. In consequence, the deanery meeting should be arranged in such a way that it nourishes camaraderie among the priests. In pursuit of this indispensable goal, it is suggested that each deanery meeting might conclude with a meal, the costs of which would be shared by the parishes of the deanery.
12. According to the needs of each particular deanery, deaneries shall hold additional meetings in which deacons and other members of the parish teams in the deanery may participate to make their contribution to the promotion and coordination of common pastoral activity within the deanery. (See Diocesan Statute, 71)
13. When a parish in a deanery becomes vacant, the dean ordinarily shall be a member of the Priests Personnel Board Team that conducts the consultation in the parish. In the light of this consultation and of his knowledge of the deanery, he shall discuss the needs of the parish with the Diocesan Bishop.
14. The dean is delegated in a permanent fashion by the Diocesan Bishop to receive the Profession of Faith of a pastor appointed to a parish in the deanery.
15. The dean is also delegated in a permanent fashion by the Diocesan Bishop to install a pastor newly appointed to a parish in the deanery.
16. The primary obligation of providing a supply priest, when the need arises, rests upon the parish with the cooperation of the individual priest. However, when in an emergency, such as illness, a parish in a deanery is unable to obtain a priest to supply, it shall be the dean’s responsibility to assist the parish in obtaining one using the resources provided to him by the Office of the Personnel Director for Priests. It shall be the Priests Personnel Director’s duty to ensure that each dean has a current resource list.
17. Immediately upon appointment the dean shall make himself thoroughly familiar with the responsibilities entrusted to him by the Church as set out in Canon 555 of the Code of Canon Law and Diocesan Statutes 69 -71. He should be especially conscious of the responsibility, outlined in Canon 555, paragraph 1, 2 and paragraph 2 and 3, to show a pastoral concern for the well-being of all the clergy (diocesan priests, religious priests, and deacons) resident within the deanery.

## **APPENDIX XI**

18. To coordinate the apostolate of the deans and to provide mutual support for them in the exercise of their responsibilities the deans shall meet regularly under the chairmanship of the Coadjutor or Auxiliary Bishop. As chairman, the Coadjutor or Auxiliary Bishop shall be the diocesan liaison officer to the deans for ordinary affairs.
19. The Dean is to have a copy of each parish's protocol on how to reach a priest in case of emergency (Diocesan Statute 107).
20. The Dean is responsible for facilitating the scheduling of a regional Mass, or in exceptional circumstances, a "Communion Service" on those occasions when a large number of the presbyterate is absent from their parishes (Diocesan Statutes 96§4).
21. Canon 555§4 of the Code of Canon Law provides that "The Vicar Forane is obliged to visit the parishes of his district in accord with regulations made by the Diocesan Bishop." The dean shall fulfill this obligation each year during the period from the First Sunday of Lent to Pentecost Sunday. For good reason, in consultation with the Coadjutor Auxiliary Bishop, the dean may select a more suitable time for the visitations.
22. In the course of the visitation mentioned in 21 above, besides attending to the other responsibilities entrusted to him by law, the dean, in his capacity as Vicar and delegate of the Diocesan Bishop, shall devote particular attention to Canon 535§4.
23. Within 15 days of Pentecost Sunday, the dean shall submit in writing a detailed report of his visitation of each parish in the deanery to the Diocesan Bishop.

Revised and approved by Bishop William K. Weigand, effective November 1, 2007.

## DEAN'S PARISH VISITATION FORM

Revised: March 2005

Parish Visited \_\_\_\_\_

City/Town \_\_\_\_\_

- 1) Please comment on the spirit of shared and collaborative ministry of the priests, deacons, religious and staff in this parish (where appropriate).

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- 2) Please comment on the spirit of shared and collaborative ministry with and among neighboring parishes.

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- 3) Please comment on the status of the parish registers

•Baptism \_\_\_\_\_

•Confirmation \_\_\_\_\_

•First Communions \_\_\_\_\_

## APPENDIX XI

•Marriage\_\_\_\_\_

•Sick calls.\_\_\_\_\_

•Funerals\_\_\_\_\_

- 4) Please list the faith formation/evangelization programs presented in this and/or neighboring parishes.

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- 5) Please feel free to include any additional impressions/comments that may be helpful to the Bishop's office or Diocesan Pastoral Center Staff.

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Date of Visit:\_\_\_\_\_

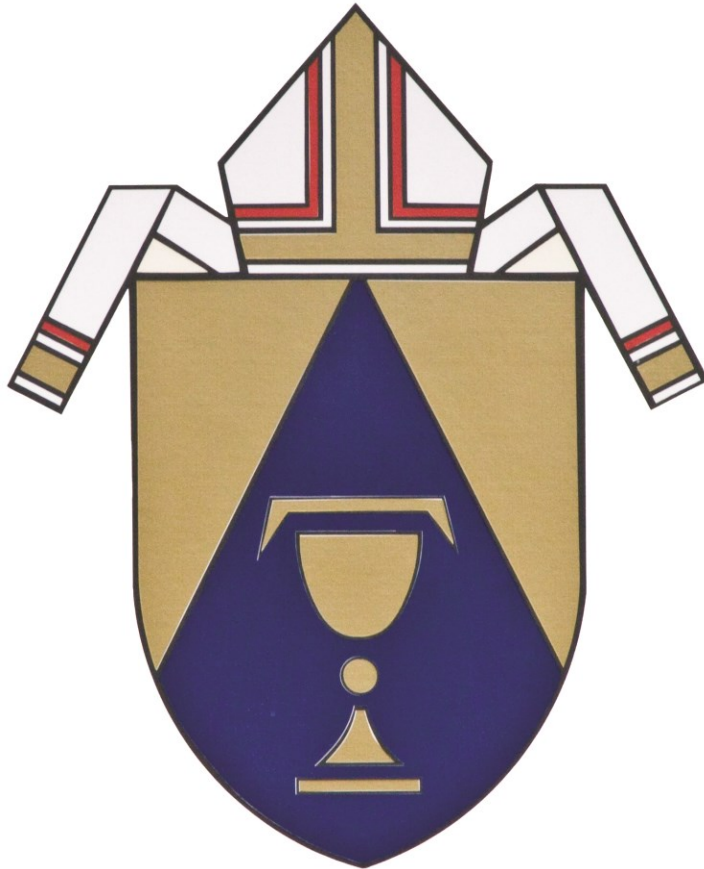
Signature of Dean \_\_\_\_\_

Please return this form to the Bishop's delegate for our deans as soon as possible. Thank you for your ministry as dean.



# APPENDIX XII

## POLICY FOR THE SUPPORT OF INCARDINATED PRIESTS WHO ARE INACTIVE BUT NOT YET RETIRED





OFFICE OF THE BISHOP

## DIOCESE OF SACRAMENTO

2110 Broadway • Sacramento, California 95818 • 916/733-0200 • Fax 916/733-0215

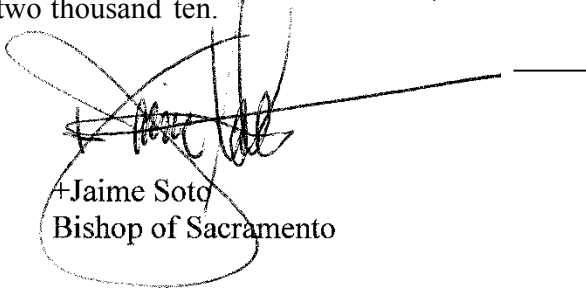
### DECREE OF PROMULGATION


Policy for the Support of  
Incardinated Priests Who are  
Inactive but not yet Retired

In order to provide in a fair and consistent manner for the decent support and social assistance of those incardinated priests who are not actively engaged in ministry, as well as to provide for their social assistance as required by the norm of law, I, the undersigned Bishop of the Diocese of Sacramento do hereby promulgate by decree the attached *Policy for the Support of Incardinated Priests who are Inactive but not yet Retired*. The terms of this policy, which have been in effect on a probationary basis for the last six months, shall take formal effect immediately.

I further decree that the aforementioned *Policy* be incorporated into the *Policies and Pastoral Guidelines* binder, dated April 1, 2006, as amended.

Given at the Diocesan Pastoral Center in Sacramento, California on this, the first day of June, in the year of our Lord, two thousand ten.

  
+Jaime Soto  
Bishop of Sacramento

  
Kathy Conner  
Chancellor

## **Diocese of Sacramento**

### **POLICY FOR THE SUPPORT OF INCARDINATED PRIESTS WHO ARE INACTIVE BUT NOT YET RETIRED**

The relationship between a Diocesan Bishop and his presbyters arises from the presbyter's incardination into the particular Church (Diocese); it is not merely one of employer-employee as understood in the secular arena. Consequently, among the many rights and obligations to which this relationship gives rise, is the obligation of the Diocesan Bishop "to take care that provision is made for [presbyters'] decent support and social assistance, according to the norm of law" (1983 *CIC* c. 384).

Canon Law and Diocesan policy already provide for the remuneration and social assistance (e.g., health care, pension) required for those priests who are engaged in active ministry and those priests who have retired in accordance with Diocesan norms. Policies concerning eligibility for and payments to the Priests Pension Plan are also covered elsewhere. This policy is intended to address the support of a presbyter incardinated in the Diocese of Sacramento who is inactive, voluntarily or otherwise, and therefore not covered by those provisions.

#### **I. VOLUNTARILY INACTIVE PRIESTS**

##### ***Those who voluntarily leave the active ministry, temporarily or permanently***

A priest who requests a temporary leave of absence, or who permanently leaves active ministry, is not entitled to the remuneration or provision for social assistance which comes as a result of dedication to ecclesiastical ministry (see 1983 *CIC* cc. 274, §2; 281).

In such instances, the priest should request a dispensation from the obligation of 1983 *CIC* c. 286, in order that he might pursue employment in the secular world.

In order not to cause scandal or confusion among the faithful, a priest who voluntarily leaves the ministry may not accept employment in any parish or institution affiliated with the Diocese of Sacramento. Seeking or accepting employment from any other Catholic institution within the Diocese of Sacramento requires the prior permission of the Diocesan Bishop.

The Diocesan Bishop may, in a particular instance, offer charitable assistance to a priest who has left active ministry, in accord with the norm of law.

The rights and obligations of a priest who has been granted permission for a temporary leave of absence are to be enumerated in the document which grants the permission.

## II. INVOLUNTARILY INACTIVE PRIESTS

### *Preliminary Administrative Leave /Temporary Restriction of Faculties*

A priest placed on administrative leave or whose faculties have been temporarily restricted pending investigation of a complaint retains the right to full remuneration and provision for social assistance. This right remains in place until such time as a canonically initiated preliminary investigation (1983 *CIC* c. 1717) of an alleged delict has concluded or the investigation of a complaint has concluded. Any expenses incurred for canonical representation are to be covered by the Diocese.

### *Those who are inactive due to a forced leave of absence pending a canonical process*

Following the conclusion of a canonically initiated preliminary investigation, if the Diocesan Bishop determines that a canonical process (administrative or judicial) is warranted, the priest retains his rights regarding provision for social support until the conclusion of that process. During the canonical process, a priest also retains his right to decent support by the Diocesan Bishop. However, due to the fact that he is not engaged in active ministry, the following adjustments will be made to that support:

- In lieu of the room, board, and remuneration given to a priest in active ministry, the priest on leave will receive from the Diocese an amount necessary to maintain a standard of living appropriate to a priest. This sum will be determined by calculating 165% of the amount required by the federal government to qualify for public assistance (*Net Monthly Income Eligibility Standard for a Household of one in the Lower 48 States as determined annually by the US Department of Agriculture Food and Nutrition Service's Supplemental Nutrition Assistance Program [USDA/FNS/SNAP]*)
- Ordinarily, it will be the responsibility of the priest in this case to find his own housing out of the allowance provided. Nevertheless, in some cases room and board may be provided by the Diocese (e.g., in a rectory), in which case, the amount provided directly to the priest will be adjusted to \$500 a month.
- Since the automobile allowance is provided to assist the priest in active ministry, the payment of the automobile allowance as well as any reimbursement for automobile expenses, including insurance, is also suspended.
- Although there is no reimbursement for expenses related to ministry, the priest retains the right to reimbursements which are related to his obligations as a priest (e.g., retreat, continuing education).

A priest in this status may request a dispensation from 1983 *CIC* c. 286, in order to obtain employment in the secular workplace. Such employment, however, as well as any other source of income, will be taken into account, when determining the amount required for decent support.

The Diocese will continue to cover the expenses for the priest's approved canonical counsel. However, any expenses for civil or criminal legal counsel are the personal responsibility of the priest.

The rights and obligations of a priest placed on leave are to be clearly enumerated in the canonical precept which temporarily restricts his ministry.

***Those who are dismissed from the clerical state or who are granted dispensation from the obligations of the clerical state***

A priest, who, following a canonical trial, or who, by ex officio penalty, is dismissed from the clerical state, loses his right to decent support and provision for social assistance. The Diocesan Bishop may, in a particular case, suggest options for charitable assistance to a dismissed priest who is truly in need *as a result of the penalty*” (1983 CIC c. 1350, §2).

A priest, who, following a request for dispensation from the obligations of the clerical state, is granted the favor by the Holy Father, is likewise no longer entitled to decent support and provision for social assistance.

***Those restricted to a life of prayer and penance***

A priest, who, following a canonical process, is restricted to a life of prayer and penance, and who is not yet eligible for retirement benefits, is to be provided decent support and the necessary social assistance appropriate to his state. A particular priest's health and any outside source of income, are to be taken into account in determining the manner in which support is provided. In an individual case, dispensation from the obligations of 1983 CIC c. 286 may be warranted.

A priest, who, following a canonical process, is restricted to a life of prayer and penance, and who is eligible for retirement benefits, is to make use of those benefits to provide for his needs.

***Those who are unsuitable for assignment***

A priest who is unsuitable for assignment due to health, disability, impediment, notoriety, or some other determination by the Diocesan Bishop, remains the responsibility of the Diocesan Bishop in terms of decent support and provision of social assistance.

Nevertheless, the Diocesan Bishop, depending on the circumstances, may dispense the priest from the obligations of 1983 CIC c. 286, and require the priest to seek employment in the secular world. Any remuneration from such employment is to be taken into consideration in providing the necessary support for the priest.

Any support which is directly provided to the priest should be in keeping with the lifestyle appropriate to a priest, and ordinarily should be tied to the aforementioned indices provided by the USDA/FNC/SNAP (i.e., 165% of the poverty level).

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# APPENDIX XIII

## FUNERAL AND CEMETERY BENEFITS FOR PRIESTS



# Diocese of Sacramento Clergy Benefit Program

Catholic Funeral and Cemetery Services, a Ministry of the Diocese of Sacramento, offers Clergy benefits on funeral, cremation, casket and/or urn, location amount and memorial.

## Applicable Discounts

### Incardinated Priests

*Funeral:* Free Funeral Service Plan Package and up to \$3,000 allocation for a casket provided by CFCS, excluding cash advance items.\*

*Cemetery:* Free grave and there are no burial related service charges (opening/closing, inurnment, entombment included). Value of grave (up to a maximum of \$7,500) can be applied to a more expensive location amount. 50% discount off of cemetery memorial.

Incardinated Priests' parents are eligible for 25% off Funeral Service Plan Package Price, including a casket and/or urn provided by CFCS, excluding cash advance items\*; and 25% off Location Amount for cemetery purchase; full charges applicable for other services. Priest's siblings and grandparents are eligible for a 10% discount off Funeral Service Plan Package Price and a 10% discount on Location Amount for cemetery purchase. \$500 off cemetery memorial for all family members.

### Deacon and Spouse

*Funeral (At-need or Pre-need):* 50% off Funeral Service Plan Package Price, including a casket and/or urn provided by CFCS for both Deacon and his spouse, excluding cash advance items.\* (For married Deacons, this amounts to one full funeral service at no charge).

*Cemetery (At-need or Pre-need):* 50% off Location Amount and there are no burial related service charges (opening/closing, inurnment, entombment included). Value of grave (up to a maximum of \$7,500) can be applied to a more expensive location. 50% discount off of cemetery memorial.

Deacon's immediate family (children and parents) are eligible for 25% off Funeral Service Plan Package Price, including a casket and/or urn provided by CFCS, excluding cash advance items\*; and 25% off Location Amount for cemetery purchase; full charges applicable for other services. Deacons extended family (siblings, grandchildren and grandparents) are eligible for a 10% discount off Funeral Service Plan Package Price and a 10% discount may be granted on Location Amount for cemetery purchase. \$500 off cemetery memorial for immediate and extended family.



\*Cash advance items such as flowers, obituary, and other services are not included but charged at cost.

	<b>Funeral</b>	<b>Casket</b>	<b>Cemetery</b>	<b>Memorial</b>
<b>Priests</b>	FREE	FREE (up to \$3000)	FREE	50%
<b>Priests' Parents</b>	25%	25%	25%	\$500 off
<b>Priests' Siblings &amp; Grandparents</b>	10%	10%	10%	\$500 off
<b>Deacon and Spouse</b>	50%	50%	50%	50%
<b>Deacon's Immediate Family (children and parents)</b>	25%	25%	25%	\$500 off
<b>Deacon's Extended Family (siblings, grandchildren, grandparents)</b>	10%	10%	10%	\$500 off

#### Financing

At-need Funeral Services and At-need Cemetery Services need to be paid in full at the time of service.

Pre-need Services may be financed at 0% interest for up to three years through automatic payments.

- Religious Orders: Allowances may not apply for members of religious orders. Such arrangements are handled on a case-by-case basis, subject to discretionary approval beforehand (i.e. prior to any arrangements being made or committed to by any party) by CFCS Management.
- Discounts apply only to Funeral Plan Package Price, casket and/or urn provided by CFCS, Location Amount and cemetery memorial.
- Discounts have no cash value and are non-transferable
- Burial rights to graves, crypts and niches (Location Amounts) are subject to availability at each Catholic cemetery location.
- Discounts and prices are subject to change without notice.
- Married Deacons may only purchase jointly, not separately
- Other discounts or allowances—such as promotional discounts or special consideration allowances—do not apply in addition to or in conjunction with this policy.

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All Souls Cemetery & Mausoleum • 550 Glen Cove Parkway, Vallejo, CA 94591 • (707) 644-5209  
 Calvary Catholic Cemetery & Mausoleum • 7101 Verner Avenue, Citrus Heights, CA 95841 • (916) 726-1232  
 George L. Klumpp Chapel of Flowers • 2691 Riverside Boulevard, Sacramento, CA 95818 • (916) 443-7917  
 St. Mary's Cemetery & Funeral Center • 6700 21<sup>st</sup> Avenue, Sacramento, CA 95820 • (916) 452-4831