

### ***Suggested Process for Merging a Parish: Process and Checklist***

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Parishes engaged in the process of a merger have two separate categories of responsibility during the time of transition:

- To close the existing parishes
- To engage all the people of the parish communities in the process of building a new parish

These two processes go on simultaneously and details of both must be attended to by the Pastor/Administrator/Parish Life Coordinator and parish leaders.

A Merger Transition Team is recommended to provide the needed collaborative leadership to support the Pastors, Administrators, or Parish Life Coordinators in preparing all that is necessary to establish the new merged parish. This Team is led by the Pastors, Parish Life Coordinators or Administrators and two representatives of each parish who attended the March 25, 2009 meeting with Bishop Lennon. These leaders may wish to invite members of the Parish Pastoral Council and Finance Council of the parishes or other parishioners to serve on the Team. Members of the Team offer their expertise and leadership skills in order to insure a smooth transition by assisting with the procedures necessary to close the original parishes, and then form one new parish community. They do this with the assistance of the Special Assistant for Reconfiguration, Rev. Mr. James Armstrong (216 696 6525 or 800 869 6525 x 2130). Deacon Armstrong will help to facilitate this process in the parishes and will provide additional resources as needed.

The current Pastors, Administrators, or Parish Life Coordinators of the merging parishes are responsible for maintaining the existing services in the respective parishes and providing staff coverage, even if temporary or transitional. They consult, when appropriate, with the respective Parish Pastoral Councils and Finance Councils regarding the work of the Merger Transition Team.

While the new parish will begin on the date indicated in Bishop Lennon's decree establishing the parish, it is anticipated that the new pastor will be named by the Bishop six to eight weeks prior to that date. After the parish is established, at the discretion of the new pastor, the Merger Transition Team may continue as needed in order to assist with the beginnings of the new parish, its ministries and administration. However, it is suggested that the Team would continue in this role for no more than six months. In some parishes the decision may be made to discern a Parish Pastoral Council and Finance Council for the new parish as a part of the transition process.

*STEPS IN THE MERGER PROCESS*

During the time of transition, the parishes should come together to engage in the steps needed to build a new parish community. The focus in this process is:

- the pastoral care of the people of the existing parish communities: their hopes for the future; their spiritual and formational needs; the concerns, and difficulties they may be experiencing at the loss of their present parish;
- the participation of the people of the existing parishes in the process of building a new parish community
- effective communication with the people of the parishes thus helping them to realize that their presence and involvement in the new parish community is welcomed and needed

Suggested Process

1. Form a Merger Transition Team:

Responsibilities:

- to provide leadership for the process of merging the existing parishes into a newly merged parish community
- to facilitate the smooth transition of members of the parish communities into a newly merged parish
- to communicate with and engage the people of the parishes through the entire process of merger

Membership

- Executive Committee: those who attended Bishop Lennon's March 25, 2009 meeting. There would be three persons from each of the existing parishes.
- Invited members of the Parish Pastoral Council and Finance Council of the parishes or other parishioners.
- Subcommittees: parishioners from each parish drawn either from the Pastoral/Finance Councils and/or the parish communities. Committees may be formed to assist with the major areas of responsibility/tasks in the merger process.

Structure

- From the executive committee select a chairperson or co-chairpersons and a secretary.
- Form subcommittees and select a chairperson/co-chairpersons and secretary for each group.

- Consideration might be given to form subcommittees to address areas such as:
  - Liturgy and Worship
  - Parish Ministries and Outreach
  - Education/Formation and Youth Ministry
  - Parish Life and Social Activities
  - Internal and External Communication
  - Finances, Facilities and Legal Matters
  - Parish Staffing and Administration
  - Where necessary a parishioner could serve on more than one committee

### Resources

- Members of the parish staffs may serve as a resource to each of the committees providing them with information, etc.
- Bishop Lennon has appointed a Special Assistant for Reconfiguration who will assist the parishes in the process of merger and provide resources as needed
- Members of the Diocesan Staff are available to assist as needed
- Additional resources are listed at the end of this document

### Function of the Merger Transition Team, Executive Committee and Subcommittees

- The Merger Transition Team
  - Assure effective and frequent communication and engagement of the parish communities throughout the entire process of merging the parishes
  - Set priorities, goals and timeline for the merging of the parishes
  - Be sensitive to and attend to the needs of the parish communities through the merger process
  - Recruit and orient volunteers for the subcommittees
  - Coordinate the work of the subcommittees
  - Prepare the final plan to be recommended to the new pastor of the merged parish
  - Discuss and develop a plan in the following areas:
    - Development of a vision for moving forward in the building of a new parish
    - The development of a formal purpose statement for the new parish
    - The development of a pastoral plan for the new parish
    - The recommendation of a new name for the merged parish
- The Executive Committee
  - Plan and communicate agendas for each of the meetings
  - Coordinate follow-up to each meeting

- The Subcommittees
    - Each subcommittee will be assigned specific tasks from the Consolidation Manual, related to the focus of the group
    - The committees are responsible for presenting reports at meetings of the full committee, with a commitment to adhere to the timeline established for a final report
    - The work of these subcommittees, their discussion at the full meetings, and their consultation with the people of the parishes will help in the formation of a parish pastoral plan
2. Develop a process for regular ongoing communication within the parish and with the wider community
- Help people recognize and understand the reasons for change
  - During the entire transition process, be sensitive and respond to the feelings and concerns expressed by the parishioners as well as their expressions of hope for the future
  - Update the parish community regularly, sharing accurate and appropriate information in a timely manner.
  - Be sure that the content and timing of communication is the same in each parish
  - Correct misinformation and control rumors
  - Manage the communication process effectively

3. Gather and provide background information for the Merger Transition Team

The following information about each parish can be gathered from reports prepared in the Vibrant Parish Life Phase I and II process:

- History of the merging parishes
- Traditions and customs
- The people of the parish communities
- Hopes the people hold for the future
- Sacramental and liturgical life, and ministries of the parishes
- Organizations of the parishes
- Staffing in each parish
- Information about the local community in which the parish is located
- Facilities in each of the parishes
- Finances of the individual parishes
- Priorities identified by the cluster in the Vibrant Parish Life Phase II process



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4. Discuss what the parishes have in common and their potential for greater vibrancy as they form a new parish
  - History: positive and negative experiences
  - Hopes for the future
  - Sacramental and liturgical life
  - Ministries
  - Organizations
  - Staffing
  - Local communities
  - Facilities
  - Finances
  
5. Develop a vision for going forward by discussing the following:
  - What do we want to be as a new parish: what are the values, priorities, spirit we hope to realize together
  - What does it mean to merge, to form a new community
  - What are the hopes and concerns of the community as this change is taking place, and how will these be addressed
  - What are means of communicating and engaging the full community throughout the merger process
  - How can we honestly address areas of tension or concern within our parishes
  
6. Write a formal purpose (vision) statement for the new parish: a brief statement that addresses: Who are we? What do we value? What do we seek to become as a parish community?
  - Select a writing committee
  - Hold a meeting of the people of all the parishes (develop an agenda which will help to identify responses to the above questions)
  - Draft a purpose statement
  - Invite feedback from the parish communities
  - Revise
  - Publish the final statement
  
7. Develop a recommendation for a name of the new parish to submit to the Bishop
  - Provide information to the Merger Transition Team about the naming of a parish
  - Select a subcommittee to facilitate the process
  - Engage the people of the parishes in the process
    - Inform the people of the process for naming a parish, giving them guidelines and resources
    - Ask parishioners to make recommendations of a new name for the parish, and their reason for the recommendation

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- Collate the recommendations and prepare a response form indicating the top recommendations and a brief explanation of each
    - The people of the parishes will be asked to indicate their three top choices on the form provided
  - Recommendations are collated and the top three recommendations are forwarded to the Bishop for consideration
  - The Bishop will choose the name and inform the new parish community
8. If a new Parish Pastoral Council and a Finance Council is to be formed during the transition period the following steps will be helpful. The decision could also be made to wait until the new parish is formed, and then engage the new parish community in the discernment of a Parish Pastoral Council.
- Form a steering committee to plan for a new Parish Pastoral Council and Finance Council
  - When the plan is completed, engage the parish communities in the process of recommending members of the new Parish Pastoral Council
  - Make a listing of potential Finance Council members with background information to be presented to the new pastor for consideration
  - Resources for the formation of a new Parish Pastoral Council and a Finance Council are available from Deacon Armstrong (Pastoral Planning Office)
  - If the Parish Pastoral Council and the Finance Council are discerned after the parish is formed, the Merger Transition Team could be used by the pastor for consultation on pastoral and financial matters until the new councils are in place.
9. Finalize the Parish Merger Transitional Plan addressing Liturgy and Worship; Parish Ministries and Outreach; Education/Formation and Youth Ministry; Parish Life and Social Activities; Finances, Facilities and Legal Matters; Parish Staffing and Administration
- As each subcommittee completes the formulation of a recommended plan, the plan will be reviewed, discussed and revised by the Merger Transition Team
  - Once each plan is completed for the above areas, the Merger Transition Team reviews the entire document and prepares it in draft form for consideration by the parishes
  - The plan is presented in a town hall meeting to the parishes for their consideration and discussion
  - The final recommended plan is then presented to the pastor of the new parish. It would be good to plan meetings of the Merger Transition Team with the new pastor so that discussions on the various parts of the plan can be explained and discussed

## Resources available for Parishes

- The Formation of a Merger Transition Team
- The Responsibilities of the Subcommittees

- Writing a Purpose Statement for the New Parish
- Recommending a Name for a New Parish
- Forming a Parish Pastoral Council and Finance Council
- Sample Parish Merger Transition Plans
- Parishioners from parishes which have recently merged who are willing to share their experience with other parishes
- Ways to memorialize closed parishes
- Prayer and Care Resources for Parishes in Transition
- The Welcoming Manual

These resources will typically include the following:

- A description of a possible process
- Samples of what has been done by other parishes
- Forms that could be used to support the process

These resources will be available from or through Deacon James Armstrong as he works with each of the parishes.

## CHECKLIST OF ACTIVITIES RELATED TO PARISH MERGING/CLOSING

**Canonical Implications: Section 3 of the Consolidation Manual**

- ☐ Determine from the Bishop's letter whether the parish is being suppressed and joined to another existing parish or if the parish is being merged with another to create a new parish.
- ☐ Read Section 3 for a clarification of the distinction between "suppression and joining of parishes" and "merging two or more parishes."
- ☐ Gather parish pastoral and finance council to familiarize them with the information in Section 3 also.
- ☐ Form a Merger Transition Team from the councils and others from the parish.
- ☐ Use the Process for Parish Mergers as your guide: Section 5

**Closing a Parish (Technical Responsibilities) Section 4 of the Consolidation Manual**

- ☐ Set an appointment with the Special Assistant for Reconfiguration to discuss and schedule the following:
  - the assistance of the Diocesan Facilities services and Catholic Charities Facilities Corporation in the care and closing of the buildings;
  - the inventory of sacred objects done by Henninger's;
  - the assistance of the Diocesan Finance Office;
  - the assistance of the Archives in the care and transfer of parish records and history
- ☐ Priests should label items which belong to them personally
- ☐ Secular items having a value of greater than \$1,000 should be identified CCFC will assume responsibility for their sale following the closing of the parish
- ☐ Secular items having a value of less than \$1,000 may be disposed of at the discretion of the pastor

**Merging Parishes: (Technical Responsibilities) Section 5 of the Consolidation Manual**

- ☐ The pastor of the new parish will determine if the new parish will assume responsibility for the buildings and grounds of the former parishes, or if he wishes to delegate responsibility for closure and sale to the diocese. (see Consolidation Manual, Section 7)
- ☐ Set an appointment with the Special Assistant for Reconfiguration to discuss and schedule the following:
  - the assistance of the Diocesan Facilities services and Catholic Charities Facilities Corporation in the care and closing of the buildings;
  - the inventory of sacred objects done by Henninger's;
  - the assistance of the Diocesan Finance Office;
  - the assistance of the Archives in the care of parish records and history
- ☐ Since all properties belonging to the former parishes become the property of the new parish, determination will have to be made about what will be transferred to the site of the new parish, i.e. sacred and secular goods.
- ☐ Once the above determination is made, the procedure for all other goods would be as follows:

- The priests should label and separate all personal religious/ secular items which belong to them
- Make an arrangement with Henninger's to inventory all remaining sacred goods
- Secular items having a value of greater than \$1,000 should be identified and arrangements made for their sale (or delegated to CCFC)
- Secular items having a value of less than \$1,000 may be disposed of at the discretion of the present pastor of the parish

#### **Sacred and Religious Goods: Section 6 of the Consolidation Manual**

- ☐ Inform the people of the merging parishes of the way in which sacred/religious goods will be cared for and/or disposed of.
- ☐ Discuss the placement of items of particular significance to a parish community with the newly merged parish, a parish with a special relationship with the closing parish (i.e. a CIC partner) or with an ethnic parish of the same community.
- ☐ Inform the people of the parish where religious items (larger and more significant) will be sent, if that information has been determined.

#### **Facilities Management and Property Issues: Section 7 of Consolidation Manual**

- ☐ Confirm that the priests in residence have made an inventory of personal religious/sacred belongings.
- ☐ Arrange a meeting with Catholic Charities Facilities Corporation for the Pastor, Business Manager and Maintenance Person to discuss issues pertaining to the building and properties.
- ☐ Prepare and provide information on the following topics (see details in Section 7 of the Consolidation Manual):
  - Windows: their condition, information on stained glass windows
  - Security System
  - Fire Protection
  - Utilities
  - Grounds and arrangements for care
  - Organ/Piano
  - Appliances/Office Equipment
  - Heating System
  - Air-conditioning System
  - Gather documents and information related to Mechanical, Plumbing and Water, and General Property Information

#### **Communication and Public Relations: Section 8 of the Consolidation Manual**

- ☐ Prepare to offer immediate and accurate responses to the media when questions arise.
- ☐ Designate a spokesperson for the parish regarding all inquiries from the media.
  - Make all parish personnel aware of this.
- ☐ Know how to contact the Diocesan Department of Communications for assistance, when needed.

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- ☐ Establish a comprehensive communication plan for the parish community which includes a variety of means of communication: town hall meetings, small group gatherings, bulletin announcements, letters, the parish web site, etc

The purpose of these communication efforts would be the following:

- ☐ Helping people recognize and understand the reasons for change.
- ☐ Correcting misinformation and controlling rumors.
- ☐ Communicating with all audiences.
- ☐ Respecting all constituencies.
- ☐ Maintaining calm even in the midst of critical comments and attitudes.
- ☐ Retaining a sense of the history of the parish community.
- ☐ Listening not only to words but feelings
- ☐ Remaining clear, consistent and focused on the tasks at hand.
- ☐ Assuring your audiences receive information from the parish leader before they receive it from the media.
- ☐ Sharing clear, accurate information in as many ways and venues as possible.
- ☐ Engaging the wisdom of your parish community in this process.
- ☐ Protecting against abuse of media by those who have issues with the process.
- ☐ Keeping the focus on our mission as a church, praying for the people of the parish, the diocese and the universal church.

#### **Rescheduling Marriages: Section 9 of the Consolidation Manual**

- ☐ Complete Section 9 of the Parish Consolidation Manual.
- ☐ Complete the Marriage Rescheduling Form.
  - Attach the original to the couple's Marriage Preparation File.
  - Mail a copy of the Marriage Rescheduling Form to the parish where the wedding will be held.
  - Give a copy of the Marriage Rescheduling Form to the couple.
- ☐ Transfer the Marriage Preparation File (with the Marriage Rescheduling Form attached to it) to the pastor of the parish where the marriage will take place, after the couple's marriage preparation is completed.

#### **Parish Statistical Information: Section 10 of the Consolidation Manual**

For parishes scheduled to merge, coordinate with the Chancery with regard to the transfer of sacramental registers and marriage files to the new parish site where they will now be stored.

- ☐ Pack all records to be transferred to the newly merged parish.

#### **Liturgical Issues: Section 11 of the Consolidation Manual**

- ☐ Develop a plan for spiritual gatherings that will help to support people in the process of closing and merging their particular parish. Refer to *Prayer and Care Resource For Parishes in Transition*. Some possibilities to consider:

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- Evening prayer
- Solemn exposition of the Holy Eucharist
- Parish Mission on themes of change, trust, hope, faith, grieving
- Opportunities for prayer and reflections for individual parish groups and organizations
- Plan for the closing Mass of each parish prior to the merger – refer to Section 11 for further details
- Plan for the first Mass of the newly merged parish; contact the Office for Worship for further details
- Plan for special opportunities for prayer and reflections at the first meetings of the newly merged parish groups and organizations
- Develop a plan for communal experiences that will bring the parishes together. For example:
  - Invite parishioners to bring pictures of themselves as they celebrated various sacraments. Use these for a bulletin board or other display
  - Display photos of past parish groups and parish gatherings
  - Invite clergy & religious who have served at the parish as well as former parishioners to significant events
  - Invite alumni or past membership of parish groups to a reunion or homecoming

#### **Ethnic Communities: Section 12 of the Consolidation Manual**

- Meet with the specific ethnic groups that have been served in one or more of the parishes that are merging. Discuss with them ways in which their values, traditions and customs may be incorporated into the new parish.
- Plan special gatherings of these groups to minister to their unique needs in the transition process of closing and merging.
- Plan specific ways to recognize and include these ethnic groups at the first Mass of the newly merged parish.
- Plan specific ways to include these ethnic groups at the first meetings of the newly merged parish groups and organizations.
- If the ethnic group will remain with the newly formed parish, plan ways in which the special devotions, traditions and customs of the community may be honored.

#### **Human Resource Issues: Sections 13, 14, 15, and 19 of the Consolidation Manual**

- Give copies of the pages relating to securing future ministry (employment) in Sections 13, 14, 15 and 19, to all those on the parish staff: priests, deacons, religious and lay.
- Contact the staff of the Office of Continuing Education and Formation of Ministers for assistance with transition issues and/or programming relating to change and transition.
- The *Reduction in Parish Staff Guidelines* contained in Section 19 of the Consolidation Manual “only applies to reductions in parish staff arising out of parish consolidation; it does not apply in other situations.”
- The *Reduction in Parish Staff Guidelines* apply to all lay and religious “at will” employees; it may apply to permanent deacons who are “at will” employees in a non-ministerial position; and does not apply to employees under contract. Parishes are bound by the terms of contracts.
- Read information on termination notice, severance pay, accrued vacation and benefits, and unemployment compensation in Section 19 of the Consolidation Manual

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- ☐ Refer all employees who will not have a position to the Career Resource Center under the direction of the Catholic Charities Human Resources Department with the assistance of the Human Resources Department of the Diocese of Cleveland will provide transition assistance, including workshops and outplacement services through Catholic Charities employment and Training Services. (Section 19 of the Consolidation Manual)
- ☐ In selecting employees for positions in the new parish, the pastor or administrator shall take into account, first and foremost, the effective operational and economic needs of the parish, as well as job qualifications, job performance, job importance, seniority, and EEO considerations. (Section 19 of the Consolidation Manual)
- ☐ In the event of a parish merger where the new parish has fewer openings for employment than there were employees in the former parishes, the new parish may hire those employees with the best performance records who most closely meet the needs of the job description. (Section 19 of Consolidation Manual)
- ☐ All parishes either closing or merging are reminded that any severance pay requires special tax treatment according to Internal Revenue Service, publication E. (Section 22 of the Consolidation Manual)
- ☐ In the case of a merger, employees at the closed and merged parishes who will be retained will become employees of the new parish. Federal identification numbers of the closed and merged parishes should not be terminated until all final payroll tax returns have been filed and all W-2 and Form 1099's have been issued. (Section 22 of the Consolidation Manual)
- ☐ Encourage parish employees to take advantage of all workshops and other assistance which will be offered to help them in this transition and in finding new employment.

#### **Catechetical Services: Section 17 of the Consolidation Manual**

- ☐ Complete the form labeled, *Details Concerning Religious Education/Formation Opportunities for Children, Youth and Adults in your Parish*.
- ☐ Provide this form to the pastor of the new parish.

#### **Volunteer Ministry and Parish Life Activities: Section 18 of the Consolidation Manual**

- ☐ Complete the *Administrative Overview of Parish Ministry* and *Individual Ministry Data Sheet* in Section 18.
- ☐ Complete the form, *Parish Special Celebrations/Neighborhood Events* in Section 18.
- ☐ Complete the *VIRTUS Training Data Sheet* in Section 18.
- ☐ Photocopy all the forms and distribute them to the receiving or merging parishes as indicated in Section 18.
- ☐ Hold a meeting with the parish staffs of all of the involved parishes to discuss how to incorporate volunteer ministries and special celebrations or neighborhood events into planning for the new parish.

#### **Health Care Services: Section 20 of the Consolidation Manual**

- ☐ Complete the forms in Section 26 of the Consolidation Manual concerning the Pastoral Care of the Sick and Homebound.



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- ☐ Make a listing of all those ministering to the sick, i.e. Eucharistic Ministers, members of the Legion of Mary, Stephen Ministry, etc.
- ☐ Provide these forms and listing to the pastor of the new parish.

**Development Issues: Section 21 of the Consolidation Manual**

- ☐ Send information to the Catholic Diocese of Cleveland Foundation Office on any pending grant or proposal activity which will require follow-up once the parish closes or merges.
- ☐ If a need arises, contact the Catholic Diocese of Cleveland Foundation for information on parishioners of parishes which have been suppressed. This may be of assistance to the newly merged parish.

**Finance Issues and Procedures: Section 22 of the Consolidation Manual**

- ☐ Review Section 22 of the Consolidation Manual to get an overview of all financial responsibilities.
- ☐ Complete all forms as requested according to the schedule outlined in Section 22.

**Cemeteries: Section 23 of the Consolidation Manual**

- ☐ Contact the Catholic Cemeteries Association with issues pertaining to the care of a parish cemetery. Among issues to be considered are the following:
  - Condition and accuracy of cemetery records
  - Back up, archiving and storage of cemetery records
  - Condition of the cemetery property and maintenance needs
  - Contracts for cemetery care and maintenance
  - Status of the perpetual care fund
  - Future funding of the perpetual care reserve
  - Lot split of the property
  - Future care of the cemetery

**Archives and Records: Section 24 of the Consolidation Manual**

- ☐ Review the Diocesan policy on the retention of archival documents and records that is contained in Section 24 of the Consolidation Manual.
- ☐ Assemble, pack and label all documents and records.
- ☐ Transfer all financial records as directed in Section 22 of the Consolidation Manual.
- ☐ In parishes that are merging:
  - Transfer all sacramental records to the new parish.
  - Transfer all other archival materials to the Diocesan Archives as directed in Section 24 of the Consolidation Manual.
- ☐ In parishes that are closing:
  - Transfer all archival records (including sacramental records) to the Diocesan Archives.

**Persons with Disabilities: Section 25 of the Consolidation Manual**

- ☐ Complete all pertinent sections of the forms that detail your past or present "Ministries to Persons with Disabilities," as well as the accompanying form "Accessibility Information."
- ☐ Provide these forms to the pastor of the new parish.

**Sacramental Preparation and Pastoral Care of the Sick: Section 26 of the Consolidation Manual**

- ☐ Complete the forms in this section:
  - Baptism
  - Reconciliation
  - Eucharist
  - Confirmation
  - Marriage
  - Anointing of the Sick / Pastoral Care of the Sick and Homebound
- ☐ Provide these forms to the pastor of the new parish.

**Closing a Parish: Process and Checklist: Section 27 of the Consolidation Manual**

- ☐ Form a committee to assist the pastor in the process of closing the parish.
- ☐ Follow the process outlined in Section 4 of the Consolidation Manual.
- ☐ Use the checklist marking it as tasks are completed.

**Merging a Parish: Process and Checklist: Section 28 of the Consolidation Manual**

- ☐ Form a Merger Transition Team to help in the process of merging the parishes.
- ☐ Follow the process outlined in Section 5 of the Consolidation Manual.
- ☐ Use the checklist, marking it as tasks are completed.