



# PARISH MERGER PROCESS



*Supported by the Catholic Stewardship Appeal*

Office for Planning and Councils  
3501 South Lake Drive  
St. Francis, WI 53235

**PARISH MERGER PROCESS**

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PARISH MERGER PROCESS CHECKLIST

**1. ABOUT A PARISH MERGER**

A parish merger involves two or more parishes which join together to form a single parish corporation. Mergers involve both civil and canonical processes. In most cases, one or all of the parish corporations are dissolved and one or all of the parishes suppressed. This allows for two or more parishes to be consolidated into an existing parish or to form an entirely new corporation and parish.

Whether the merger is with an established parish or creates a new parish, all parishes will lose their former distinct identities and assume one new merged identity. All parishioners of the individual parishes now become parishioners of a new entity. The boundaries of the merged parish will incorporate all the territory that was previously served by the merged parishes. In addition, all records, property, assets and liabilities of the individual parishes become the property of the merged parish.

Parish mergers can be described in three basic ways:

1. **One or more parishes merge with an existing parish.** One parish retains its corporation and parish name while the other corporation is dissolved and the parish suppressed.
2. **Two or more parishes merge into a new parish and use an existing church building or buildings.** The parish corporations are dissolved and the parishes suppressed. A new corporation is formed and a new parish is established. The Archbishop, as part of his authority to erect new parishes, gives the parish a new name after consultation with the pastor. One or more of the church buildings is used for liturgical celebrations. The location of offices and ministries for the parish may make use of facilities at the sites of the former parishes.
3. **Two or more parishes merge into a new parish and build a new church building.** The parish corporations are dissolved and the parishes suppressed. A new corporation is formed and the parish is established with a new name. The property of the former parishes can be disposed of or continue to be used by the new parish.

There are many additional decisions which merging parishes will make about their use of buildings, staff, and resources. These decisions will make each merged parish unique.

Usually and preferably, a merger is proposed after years of collaborative activity by parishes. Parish communities which have a history of sharing staff and programs often view their merger as the culmination of all their previous efforts. There are instances, however, when a merger can happen quickly. For example, the proposed purchase of one parish's property or the imminent financial collapse of another parish may require a merger with a neighboring parish.

Above all, it is important to recognize that the merger process must be a "people" process. Any change in parish status can raise resistance levels, emphasize boundary or turf issues, and divide people into camps. Special attention and care must be given to honest and open communication, opportunities for people to celebrate their past histories and the new beginnings in ritual as well as ways of dealing with the grief and loss which can be experienced when parishes close. Even with all the legal, canonical and organizational details of the merger, parish leadership must be most concerned about including former members into the new parish. The merger process which is conducted with sensitivity, openness, and participation will usually create a more viable and vital parish situation than previously existed in the former parishes.

## PARISH MERGER PROCESS CHECKLIST

### WHO WILL LEAD THE MERGER PLANNING PROCESS?

A merger is a collaborative process between the merging parishes and various Archdiocesan Offices. To complete the requirements of corporate law, legal counsel will be necessary and an attorney experienced in parish mergers will be recommended by the Archdiocese.

- **The Pastor(s) of the Parishes.** The pastor(s) initiate the process within the parishes by: building consensus for the merger, forming a single parish council and committees, and requesting the Archbishop's approval to proceed with the merger. The pastor(s) have oversight over the merger planning process.
- **The Office of the Archbishop.** After receiving the formal request from the pastor(s) to merge, the Archbishop will consult with the Archdiocesan Council of Priests. He will formally reply to the request. The name for the new parish is also submitted to the Archbishop's Office. When the legal and canonical requirements are completed, the Archbishop should be contacted to install the new pastor or moderator and bless the parish.
- **The Office for Planning and Councils.** In the Archbishop's formal reply to the merger request, the pastor will be notified about contacting the Office for Planning and Councils to initiate the formal process. The Coordinator will meet with the Parish Council and Committees to prepare for the merger tasks and to facilitate the development of the ministry plan. The Office will assist the pastor and parish leadership as needed during and after the merger process.
- **The Chancery.** The canonical and civil documents for the merger are processed through the Chancery. When all the documentation is completed, the Chancery will inform the Archbishop and the pastor.
- **The Finance Office.** The Finance Office will assist with the transition from multiple financial centers to a single system.
- **Catholic Schools Office.** If any of the parishes conducts a Catholic School, the Schools Office should be contacted to assist with transition issues which may affect the ministry of the school(s).
- **Human Resources Office.** If staffs are being merged, the Human Resources Office should be consulted about reductions in force, job descriptions, and hiring procedures.
- **The Parish Council.** The parish council will work closely with the pastor by: helping to build consensus for the merger, coordinating the merger planning process, facilitating the process for the new name for the parish, and developing as well as implementing a communication strategy.
- **Parish Committees.** Each committee and the staff member(s) who works with the committee will have specific responsibilities in both the merger process and the development of the new ministry plan.

### HOW LONG WILL THE MERGER PROCESS TAKE?

The merger planning process can take anywhere from 6 to 18 months. In most cases, it is prudent to plan the merger completion date for the end of the fiscal year or June 30th. With that date in mind, the earliest a merger process must start in order to be completed on time is January 1<sup>st</sup> of the same year.

## 2. MERGER PLANNING PROCESS

### **Step 1: Initial Contact and Preliminary Tasks**

#### **To Be Accomplished in this Step:**

- Contact the Office for Planning and Councils and request PARISH MERGER PROCESS Manual
- Develop, discuss, and ratify a recommendation containing the rationale and preliminary vision for the merging parishes. The recommendation is ratified by all Parish Councils and trustees
- Send a formal letter requesting the merger, including the ratified recommendation, to the Archbishop. The Archbishop will consult with the Archdiocesan Council of Priests and communicate his approval in a formal letter.
- Contact legal counsel for the merger. Office for Planning and Councils will provide a reference.
- Prepare for the facilitation of the merger planning process by representatives from each parish who have established a new parish council with approved Constitution and By Laws.
- Recognize that all committees will need to be merged.
- Continue the functioning of individual civil corporations and finance committees until the merger is finalized.

### **Step 2: Meeting of Parish Council(s), Staff(s), and Committees**

#### **To Be Accomplished in this Step:**

- Overview the merger planning process
- Establish timelines for merger planning process and implementation of ministry plan
- Assign overall transition tasks and ministry plan tasks to council and committees:
  1. **Parish Council** assists pastor with:
    - a. Overall merger effort
    - b. A communication strategy to keep the parishes informed about the merger process and related events, using *Checklist I: Communications*
    - c. The completion of *Checklist A: Canonical Reconfiguration*; *Checklist B: Naming the New Parish*; and *Checklist H: Human Resources*
    - d. Overall development of ministry plan
  2. **Lifelong Formation Committee** develops:
    - a. A membership strategy to contact and register existing parish members into the merged parish
    - b. The lifelong formation part of the ministry plan
  3. **Prayer and Worship Committee** develops:
    - a. A celebrations strategy to celebrate the past and to transition into a new worshipping community
    - b. The prayer and worship part of the ministry plan
  4. **Human Concerns Committee** develops:

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- a. A grief and loss strategy to help members work through the adjustment of becoming a new entity

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5. **Finance Committee** develops:
- a. An administration strategy to transition finances, personnel, and property into a new entity
  - b. Assist the pastor with the contact of the Archdiocesan Finance Office and a recommended attorney to complete the necessary legal work
  - c. The completion of *Checklist C: Disposition of Church Records; Item D: Corporate Reconfiguration; Checklists E and F: Disposition of Church Property; and Checklist G: Care of Parish Cemetery(ies)*
  - d. The Finance and Administration part of the ministry plan
    - Set completion date for transition tasks and joint meeting of council and committees

**Step 3: Meeting to Review Preliminary Plans**

**To Be Accomplished in this Step:**

- Review and revise the committee tasks
- Propose a schedule for committee tasks
- Discuss preliminary vision for the merged parishes
- Prepare leadership for parish meeting(s)

**Step 4: Meeting with Parish Membership**

**To Be Accomplished in this Step:**

- Provide an overview of the merger process
- Present a preliminary vision for the merged parishes
- (Large group will be divided into four areas of ministry) Present the transition tasks and welcome additional suggestions and changes
- Welcome ideas for the ministry plan from the four areas of ministry
- (Large group will re-convene) Reports on any additions to the transition tasks and the suggestions for the ministry plan.

**Step 5: Meeting to Develop Ministry Plan**

**To Be Accomplished in this Step:**

- Review any recommended changes to the transition tasks
- Clarify understanding of planning terms and the development of the ministry plan
- Divide into ministry groups
- Complete a draft of the ministry plan

**PARISH MERGER PROCESS CHECKLIST**

**Step 6: Meeting of Parish Council**

**To Be Accomplished in this Step:**

- Review, revise, and recommend ministry plan to Office for Planning and Councils. The Office will formally reply to the parish about the review of the plan.
- Review the progress of the transition tasks
- Review and complete the merger checklists and forward all required information to legal counsel and Archdiocesan Chancery. The Chancery will inform the Archbishop when all of the necessary legal and canonical conditions for the merger have been received and filed.

**Step 7: Archbishop Approves Merger**

**To Be Accomplished in this Step:**

- Officially establish the new parish and make clergy appointments
- Invite the Pastor to contact Archbishop's office to arrange for a liturgical celebration to dedicate the new parish and install the Pastor

**Step 8: Implementation and Follow Through**

**To Be Accomplished in this Step:**

- Communicate and publicize important events in the life of the new parish
- Schedule first meetings of the Parish Council and Corporate board
- Seek out and reach out to those members of the former parishes who may be having difficulty with the loss of their parish or the newly merged parish
- Monitor the implementation of the ministry plan
- Evaluate annually the progress/lack of progress on the ministry plan to the Office for Planning and Councils



PARISH MERGER PROCESS CHECKLIST

**3. CHECKLIST A: CANONICAL RECONFIGURATION**

2/20/07

Date Completed	ACTION	RESPONSIBLE AGENT
_____	1. Request for permission to plan for a parish merger; recommend date for merger to become effective	Pastors, trustees and council officers
_____	2. Determine date by which merger is to be finalized and communicate to Chancery.	Archbishop, after consultation with pastors & councils
_____	3. Submit suggested names for new parish to the archbishop.	Pastors & Councils
_____	4. Determine name for new merged parish and communicate to Chancery.	Archbishop
_____	5. Prepare decree of establishment for Archbishop's signature.	Chancery
_____	6. Make necessary notifications of change of status/name /effective date. <input type="radio"/> Internal communication <input type="radio"/> External communication	Chancery
_____	7. Announce the name to new parishioners	Pastors

#### 4. CHECKLIST B: Naming The New Parish

2/20/07

##### GUIDELINES

When considering names for a new parish, please keep in mind the following:

1. The name must be
  - a. A recognized title of the Blessed Trinity; or
  - b. A mystery in the life of Christ, or a title already accepted in the liturgy; or
  - c. The Blessed Mother under a title already accepted in the liturgy;
  - d. A title of the Holy Spirit already accepted in the liturgy; or
  - e. The name of one of the archangels or a canonized saint.
  
2. A name not in use by any other parish in the Archdiocese
  
3. Engage the whole community in the process. Parishioners participate in the Naming Process by submitting names to the Naming sub-committee following the guidelines above and rationale for their suggestion. The submissions will be sorted by the subcommittee and given to the Steering Committee. They in turn will present to list to the combined Council who will discern 3 names to be sent to the Archbishop for consideration.
  
4. The Archbishop selects the name for the new parish.

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Date Completed	ACTION	RESPONSIBLE AGENT
_____	1. Appoint a "New Parish Name" Subcommittee; include both staff and parishioners on it	Merger Committee
_____	2. Develop a process plan & time line to <i>Name Our New Parish</i> that will engage all parishioners: children, youth & adults of all ages	Name Committee
_____	3. Implement & complete the process	Name Committee
_____	4. Collate submitted names, eliminate duplicates or names of other parishes in the Archdiocese; present final list and rationale to Steering Committee	Name Committee

**PARISH MERGER PROCESS CHECKLIST**

<b>Date Completed</b>	<b>ACTION</b>	<b>RESPONSIBLE AGENT</b>
_____	5. Review the list of proposed names. Discern the top 10 and your rationale for these. Submit your final list to the Combined Parish Council for further discernment.	Steering Committee
_____	6. Discern three names; forward them to the Archbishop with signatures of pastor(s) and council members.	Combined Council

*Sample Form for Name Submissions*



**I have prayerfully considered the names of saints, titles of Mary and title of Christ that will inspire Our New Parish. My suggestion(s) are:**

1. (Name) \_\_\_\_\_

**Because:**

2. (Name) \_\_\_\_\_

**Because:**

3. (Name) \_\_\_\_\_

**Because:**

**Submitted by** \_\_\_\_\_  
(Optional)

Date \_\_\_\_\_

## 5. CHECKLIST C: Disposition of Church Records

2/20/07

With respect to parish records we are really dealing with two types of materials; sacramental records and administrative records.

1. **Sacramental records** are generally considered to include (even though the events they record are not all sacraments) records of baptisms, marriages, First Communions, confirmations and deaths.
2. **Administrative records**, for our purposes are everything that is not a sacramental record. Administrative records include, but are not limited to, the following types of records typically found at parishes:
  - Parish bulletins
  - Construction documents
  - Deeds
  - Financial records (ledgers, daybooks, cash books, payroll records, tax related records, etc.)
  - Parish council materials
  - Records of parish organizations, e.g. St. Vincent de Paul Societies, Christian Women, Holy Name Society, Usher Society, etc.
  - Marriage case files
  - Personnel files
  - Photographs
  - School related materials, but not pupil or teacher personnel records

### 3. Disposition of Sacramental records

All sacramental records should be transferred to the parish that assumes responsibility for the territory of the previous parish/es. The records remain at the reconfigured parish for a minimum of three years. At the end of a three year transition period, sacramental records MAY be transferred to the Archdiocesan archives, at the discretion of the pastor/parish director.

If the parish designated to obtain the sacramental records of the reconfigured parish/es is not able to care adequately for the records, they may be transferred to the Archdiocesan archives without the three-year transition period. Again, this will be at the pastor's discretion.

Information regarding the location of sacramental records will be added to the Official Catholic Directory and the Pastoral Handbook in order to assist people outside of our area.

### 4. Disposition of Administrative records

In consultation with the Archdiocesan archives and the parish finance office, records that are eligible for destruction should be destroyed in accordance with records retention guidelines. Records of more long-term or archival value MAY be transferred to the archives, at the discretion of the pastor/parish director. The transfer of records should take place just prior to the parish reconfiguration.

**PARISH MERGER PROCESS CHECKLIST**

**6. CHECKLIST D: Corporate Reconfiguration**

2/20/07

<b>Date Completed</b>	<b>ACTION</b>	<b>RESPONSIBLE AGENT</b>
_____	1. Contact attorney for preparation of corporate dissolution/establishment documents. <sup>1</sup>	Archdiocesan Finance Office
_____	2. Gather necessary financial information as instructed by attorney/Finance Office (e.g., list of all accounts in current parish names, lease agreements, etc.) submit names of two parishioners to be appointed as trustees.	Pastor
_____	3. Obtain necessary signatures of corporate officers of the new parish and submit documents to Finance Office.	Pastor
_____	4. Obtain Archbishop/Bishop signatures on corporate documents and return to attorney.	Archdiocesan Finance Office
_____	5. File corporate papers with Secretary of State.	Attorney
_____	6. Deed all property to diocese and then back to new parish corporation.	Attorney
_____	7. Arrange for federal I.D. number, state tax exempt status, wine license in new parish name.	Attorney/Finance Office

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<sup>1</sup>It is recommended that an attorney with experience in church related civil law be utilized. The Finance Office can facilitate this process and have the fees for services by the attorney billed to the parish. Attorneys who have handled such matters previously should be able to complete the processes required in a timely manner. The most experienced attorney with these matters in the Archdiocese is Dennis Purtell of White, Hirschboeck, & Dudek. Contact at 414-978-5522 or [dpurtell@whdlaw.com](mailto:dpurtell@whdlaw.com).

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**7. CHECKLIST E: DISPOSITION OF BUILDINGS**

2/20/07

Date Completed	ACTION	RESPONSIBLE AGENT
_____	1. Appoint the Buildings & Grounds Committees to work together to assess the state of all parish buildings and prepare a report for the	Steering Committee Combined B&G Committee Steering Committee
_____	2. Building assessment presented to Steering Committee	Combined B&G Committee
_____	3. Obtain the assistance of an expert to review or research the cultural and architectural heritage and history of your churches and/or buildings and their furnishings.	Combined B&G Committee
_____	4. Determine long and short-term building needs of new merged parish in light of the mission and ministry goals and provide in-put to B&G Com	Steering Committee
_____	5. Prepare a plan for utilization and/or disposition of buildings for the Steering Committee; consider the advantages and disadvantages of maintaining the integrity of multi-building complexes or portioning off segments	Combined B&G Committee
_____	6. Review and refine building usage proposal; present <i>Building Use Plan</i> to Merger Task Force	Steering Committee
_____	7. Review, Approve/ Amend <i>Building Use Plan</i> ; Prepare for implementation of the plan	Merger Task Force & Combined Council
_____	8. Contact Chancery Office with information regarding any church buildings which will no longer be utilized for worship	Pastor(s)
_____	9. Prepare decree of "reduction" of church building no longer utilized for worship for Archbishop's signature	Chancery
_____	10. Contact Finance Office with list of any buildings available for lease or sale	Pastor
_____	11. Comply with Parish Real Estate Management Guidelines <sup>2</sup> ; market any parish buildings available for lease or sale; accept offers to purchase/lease and submit proxy to Archbishop <sup>3</sup>	Parish Corporation Officers

<sup>2</sup> Additional copies of Guidelines available from Finance Office.

<sup>3</sup> For proxy request process see Parish Trustees and Administrative Services Handbook, 1994, pp. 9-11.

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**8. CHECKLIST F: DISPOSITION OF NON-BUILDING PROPERTY**

2/20/07

Date Completed	ACTION	RESPONSIBLE AGENT
_____	1. Prepare an inventory of major parish property such as office equipment including computer hardware, furnishings, appliances, church art, artifacts, sacred vessels, vestments, etc.	Sub-committee including trustees, accountable to Merger committee and Parish Council
_____	2. Conduct an inventory and assessment of all property, single or multi-site activities, etc.	Pastor in consultation with parish council and trustees
_____	3. Develop a plan for disposition of excess office equipment, furnishings, appliances.	Sub-committee accountable to pastor and parish council
_____	4. Contact diocesan archivist or other professional consultant regarding assessment of historic value of church art and artifacts.	Pastor
_____	5. Determine recipient of excess church art, artifacts, sacred vessels, vestments, etc. <sup>4</sup>	Pastor in consultation with parish council
_____	6. Transfer all bank accounts, credit cards, etc. to new parish name.	Pastor and trustees
_____	7. Calculate outstanding Mass obligations and assess ability of new parish to fulfill within one year or transfer to Chancery/World Mission	Pastor

<sup>4</sup> Articles with significant historic significance can be donated to the Archdiocesan Museum and Archives for preservation and display. The parish may establish a museum of its own for its more historic collections. Other sacred vessels or other church artifacts can be donated to the Catholic Extension Society or the World Mission Office. Sacred vessels, sacramental furnishings, etc. should not be sold or given to private individuals.

PARISH MERGER PROCESS CHECKLIST

**9. CHECKLIST G: CARE OF PARISH CEMETERY(IES)**

2/20/07

Date Completed	ACTION	RESPONSIBLE AGENT
_____	1. Determine number of cemeteries which will be in the care of the newly merged parish. <sup>5</sup>	Pastor
_____	2. Gather all cemetery registers (e.g., plot books, accounts and finance records, etc.) for review.	Pastor
_____	3. Contact cemetery consultant for assistance in determining appropriate level of financing needed to maintain cemeteries in perpetual care.	Pastor
_____	4. Review cemetery situation and provide necessary input to ensure upkeep and maintenance.	Cemetery Consultant
_____	5. Review existing cemetery association structures and determine future organizational needs.	Pastor and cemetery consultant
_____	6. Make any needed changes in association bylaws or other organizational documents.	Pastor
_____	7. Ensure that perpetual care and other cemetery funds are properly recorded in chart of accounts of newly merged parish.	Pastor

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<sup>5</sup> It is assumed that newly merged parishes will assume responsibility for the parish cemeteries assigned to all parishes involved in the merger.



## 10. CHECKLIST H: HUMAN RESOURCES

2/20/07

The closing or merging of a parish has a strong impact on the parishioners in a community. The ties that bind people to their parish are well established and in many cases of long standing. It is not easy to let go of the past. A strong emotional attachment, often rooted in shared, familiar historical events, can create a pattern of grieving not unlike the passing on of a loved one.

The impact for employees of a parish faced with merger or closing, is also one of career and financial uncertainty. When two or more parishes merge into one, employees doing similar work in each parish know that their jobs are at risk. In general a new parish simply cannot afford two or more full time Directors of Youth Ministry for instance.

As a Church, we have a responsibility to our employees to assist them in their transitions caused by parish mergers or closings. The Synod of Bishops document **Justice in the World** (1971) stated:

*All the moral principals that govern the just operation of any economic endeavor apply to the Church and its agencies and institutions: indeed the Church should be exemplary.*

Just as we would expect a business in our community to tend to the needs of its employees during lay-offs, so we must make provisions to assist our staff members who lose their jobs.

While employees should expect assistance from their parishes during these transitions, they must also be cognizant of the financial situation facing many parishes today. Unrealistic expectations will lead to anger that will further hurt the parish community at a time of anxiety. A measure of cooperation between the parish and the staff should exist with the goal being one of understanding. Common Ground document, **Called to be Catholic**, gives us guidance in these matters when it states, “*We should presume that those with whom we differ are acting in good faith. They deserve civility, charity, and a good-faith effort to understand their concerns.*”

Cardinal Bernardin

### About These Recommendations

Every parish is unique in its staff structure and resources. To mandate a set of policies or procedures for merging of staffs or termination of positions would be to not recognize these differences. These recommendations are intended as a vehicle for discussion by the parishes and their employees, and should be seen as minimum steps to consider.

PARISH MERGER PROCESS CHECKLIST

**10. CHECKLIST H: HUMAN RESOURCES**

2/20/07

Date Completed	ACTION	RESPONSIBLE AGENT
_____	1. Identify & appoint a Personnel Committee	Steering Committee
_____	2. Contact Archdiocesan Human Resources Office for guidance	Personnel Committee chair
_____	3. Invite the current staff from all merging parishes to be involved in the <u>initial</u> discussion of staffing needs. (The staff may have ideas on restructuring not envisioned by others.)	Personnel Committee
_____	4. Develop Staffing Plan & draft a proposal Identify needed positions & develop job descriptions Determine salary range & benefit package Identify starting date Determine the process and people to be involved in the interview process	Personnel Committee
Notes:		
○ Prior to approving any position to be filled, analyze the parish mission and current parish data to make sure the position addresses current needs.		
○ Where skills, knowledge, and abilities are relatively equal, let seniority in the parish guide the hiring decisions.		
○ Consider hiring staff on an interim basis for the first year until the parish is more firmly rooted.		
_____	5. Present proposal to the pastors and combined Councils	Personnel Committee
_____	6. Approval by Council	Council
_____	7. Implement the staffing process	Personnel Committee
□ 8. Give current staff notice of ending dates for their existing positions. (At least 3-6 months)		
□ 9. Inform staff of the procedures for the filling new positions, along with written job descriptions, wages and benefits, and position requirements.		
_____	10. Provide advance notice of termination date. (At least 3-6 months)	Personnel Committee

PARISH MERGER PROCESS CHECKLIST

**Termination Resulting from Parish Closing/ Merging**

Date Completed	ACTION	RESPONSIBLE AGENT
_____	11. Provide unemployment insurance coverage (Church Unemployment Pay Program) for all eligible employees.	Finance
_____	12. Inform employees of Pension Plan provisions when jobs are eliminated due to closings or mergers. Automatic vesting takes place under these circumstances.	Personnel Committee
_____	13. Inform employees of Health Insurance coverage continuation and provide three months of parish paid coverage if needed. (This provision for paid health coverage has been the standard practice for teachers when Archdiocesan schools have closed.)	Personnel Committee
_____	14. Make Archdiocesan Vacancy listing for jobs in parishes and schools, available to staff and assist in references and job placement. Subscriptions are available to employees who lose their jobs due to parish closings, at no charge to the employee, by the Parish and School Personnel Office.	Personnel Committee
_____	15. Provide employees with time off as needed to interview and research for other positions.	Pastors
_____	16. Assist long-term employees with outplacement counseling, resume building workshops, and job search skill training, if needed.	Personnel Committee

Note:

Some employees may face extreme financial problems if they do not find suitable employment immediately. Consider providing assistance through the parish human concerns committee on a case by case need basis.

### **Archdiocesan Resources to Assist Parish Employees**

While much of the assistance to staff who lose their jobs is parish based, the assistance of the archdiocesan offices can be useful in locating and securing employment within the Church.

The Parish and School Personnel Office publishes the bi-weekly Vacancy Listing and provides a resume referral service for job seekers. The office can also provide individualized assistance in resume drafts, salary and benefit expectations for various positions, and networking among the specialized ministries in the Archdiocese. The facilitation of job loss support groups for employees and spouses has been considered and parishes or districts willing to sponsor such a group should contact this office for information.

Sample job descriptions, assistance in policy development, and procedures for employee separations are also available from this office.

The Office for Religious can resource men and women religious by connecting them with other religious communities where employment possibilities may exist. Coordination of spiritual direction, for those whose experience has left them with ambivalent feelings in relationship to the Church, is also available here.

## 11. CHECKLIST I: COMMUNICATION GUIDELINES

2/20/07

By their very nature, times of transition are unsettling. Because of this, effective communication is vitally important. Those involved with change, both directly and indirectly, need accurate and consistent information regarding the future of the parish and the reasons for change. We have developed the following guidelines to assist parish leaders and anyone helping to facilitate the transition process.

When people experience tension, lack of communication is typically cited as a primary source of the stress. We must not underestimate the positive impact of effective communication — and the negative results when communication is lacking. Communication is more than simply putting forth information; it is a dynamic, a two-way process.

Please make every effort to communicate with the various groups in your area with sensitivity to appropriate timing and procedure, and remember that people need to hear information multiple times in order to process it. Help your parishioners to keep in focus the purpose of the transition, understanding the wisdom behind such decisions as timelines for establishing common parish councils or merging parishes.

If you wish to consult with someone regarding communication as your parish deals with transition, Archdiocesan Communication Office will be happy to assist you.

In these pages you will find:

1. Communication Goals
2. Audiences
3. Communication Strategies
4. Communication Tools
5. Tips for Working with the Media

PARISH MERGER PROCESS CHECKLIST

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**1. Communication Goals**

- Help people recognize and understand the reasons for change.
- Update the parish community *regularly*, sharing accurate and appropriate information in a timely manner.
- When more than one parish is involved, communicate the same information to all groups.
- Correct misinformation and control rumors.
- Manage the communication process effectively.

**2. Audiences**

Be aware of the various groups concerned with your parish situation:

- Staff
- Volunteers
- Neighboring church leaders  
(both Catholic and other denominations)
- Neighborhood
- Elected officials
- Media
- Parishioners
- Neighboring parishioners
- Civic community
- Others of importance to your parish

**3. Communication Strategies**

- Respect for people should guide all communication efforts. *How you communicate is as important as what you say.* Openness to those whose opinions differ from yours is critically important.
- Keep a positive attitude and help parishioners and staff through the various stages of transition.
- Maintain a calm presence. Your ability to do so will diminish the impact of rumors and can assuage fears.
- Receive critical comments simply as information that may be helpful to the process. Try to understand the reasons prompting the criticism, and do not take it personally.
- Show respect for the community's history while calling people forward to build the future together.
- Listen to people's concerns: calm fears when possible: help people see their importance to the new community.
- State facts accurately. Explain procedures clearly. Information shared clearly and directly will help to reduce the tendency toward "power plays."
- Recognize that sharing information prematurely, before decisions are actually made or before those most closely affected have been informed, may thwart the transition process and cause divisiveness within the community. It is important for parish leaders to maintain confidentiality until the *agreed-upon line* to share information.

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- Remember that appropriate information sharing needs to be ongoing. It is important not to assume that, since you have put forth information once, people have understood it. Not everyone is at the same "readiness" level, and we need to respect people's need to hear information many times in order to truly process it. Regular and repeated updates help people feel more grounded and secure amidst transition.
- Avoid the tendency to think that because the combined parish council and/or planning committee know what is happening, adequate communication has taken place. Sharing information with each of the audiences listed in section 2 needs to be carefully planned and implemented.
- Communicate important information directly to parishioners, staff, and anyone else personally affected by a situation *before the* media reports it.
- No matter the audience, specifically target information. Determine the most appropriate timing and sequence for sharing information with particular individuals and/or groups.
- Identify the best ways to share information. A few possibilities include:
  - Letters
  - Town hall meetings
  - Question/answer sheets
  - Individual/small group meetings
  - Newsletters
  - Media releases, etc.You know your community better than anyone. Draw upon the wisdom and power of people within the parish to help you determine the most effective ways to communicate with different groups.
- Be consistent in the information you give to various individuals and groups. Having a single point person to whom people may address their questions is helpful.
- Be aware of individuals and/or groups who may have their own agenda. Help people recognize that pushing individual agendas harms the entire community.
- Have a back-up plan for combating rumors and addressing information leaks.

#### 4. Communication Methods

Again, draw upon the wisdom of your own community to help you. Here are a few examples to assist you.

- Speak from the pulpit about the transition process and update parishioners about the progress of the transition.
- Include regular bulletin announcements to reinforce your pulpit messages. Use the

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same announcements in bulletins at each parish.

- Pray in the general intercessions for the mission of the church and for the Holy Spirit's guidance throughout the parish's transition process.
- As you hold parish meetings, routinely draw people's attention to the reality of parishes in transition throughout the archdiocese and in dioceses all over the country.
- If common questions surface regarding your parish's situation, compile a question and answer sheet for inclusion in the bulletin, posting on the parish website, or for mailing to all parishioners if this will be more helpful. It is important that people continue to feel informed and to know that they have accurate, updated information.
- Send a letter to denominational leaders of your area or gather them together to discuss the transition affecting your parish. Request their prayers and support during the transition process and for the emerging parish community.

**5. Working with the Media**

Parishioners, *staff*, and anyone else personally affected by a situation should receive important information directly from you or from another appropriate source *before* the media reports it. Nonetheless, newspapers, radio and TV reporters can play an important role in communicating messages about the parish's transition. The keys to working with the media include;

- 1) Understanding them and their job
- 2) Developing a good relationship
- 3) Delivering a solid message

*Understand the Media*

- Know your area reporters and editors and the deadlines they face. The archdiocese can help you identify them.
- Remember that you are in charge, even if a reporter becomes aggressive.

If reporters inquire about a situation which parishioners are yet unaware of, remind them of your need to respect the parishioners' right to hear information directly from you. Statements such as "it's an internal matter at this point..." or no decisions have yet been made... " are appropriate.

*Develop a Good Relationship with Reporters*

- Generally it is better to work with the media than to be non-responsive. "No comment" can portray you or the parish as being uncooperative.



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- Designate one individual as official parish spokesperson and instruct anyone who may receive media inquiries to route questions to the spokesperson. Make sure you return phone calls promptly.
- Ask what information reporters need and when their deadline is. Rather than feeling pressured to respond immediately, indicate you'll get back to them. It is important then to follow-up prior to the deadline.
- Depending upon the circumstance, you may wish to have available names and phone numbers of others to surest for media interviews, so reporters don't randomly approach parishioners or council members. Help those to be interviewed prepare their thoughts.

*Deliver a Solid Message*

- Don't be afraid to ask reporters what aspect of the issue they want to cover or if they are talking to others. This will help you anticipate questions and prepare for the answers.
- During the interview, state clearly and calmly what you believe to be most important. Find opportunities to address your main points, even if the reporter's questions do not elicit them directly.
- Deliver a quotable "sound bite." Be brief but informative. Use specific examples, analogies, relevant statistics or attributed quotes.
- Flag your answer: "The most important thing is..." or "It all boils down to..."
- Be honest. Don't feel pressured to respond if you don't know the answer. Replies such as "we haven't worked out the details," "we don't know yet," or "we haven't given thought to that" are reasonable.

*Deliver a Solid Message continued*

It is important to help all involved to recognize the dangers of using media to push one's own agenda. Taking issues to the media that would better be dealt with internally destroys trust and impedes the process of working through difficulties. Trying to use the media in personal battles often backfires. Feel free to consult with archdiocesan communication staff for ideas in dealing with media or regarding other communication issues. We will be happy to assist you.

**Conclusion**

Implementing a sound communication strategy with your various parish audiences is the best way to assure a successful transition process. By taking time from the outset to explain the issues and offer opportunities for feedback, you will lay the groundwork for building a cohesive faith

community.

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**11. CHECKLIST I: COMMUNICATION CHECKLIST**

2/20/07

<b>Date Completed</b>	<b>ACTION</b>	<b>RESPONSIBLE AGENT</b>
_____	1. <b>Consult</b> with leaders within the parishes to determine the most effective ways to communicate with various groups.	Parish Council
_____	2. <b>Determine</b> communication plan to <b>parish groups</b> <i>To Pastors</i> <i>To Staff</i> <i>To Council and Parish Committees</i> <i>To general membership</i>	Parish Council
_____	3. <b>Determine</b> communication plan with <b>other groups</b> <i>Neighboring church leaders and parishes</i> <i>Civic community</i> <i>(Funeral, Hospitals, Nursing facilities, Prison/jail facilities)</i> <i>Local Media</i> <i>Others</i>	Pastor
_____	4. Identify a point person to whom people may address questions as they arise.  Name: _____	Pastor
_____	5. If needed, hold town hall meetings, giving people the opportunity to Hear about the plans, express concerns and ask questions  Moderator(s): . Date(s): _____	Pastor
_____	6. Communicate the same information to people of all parishes involved (same bulletin announcements or newsletters, same pulpit announcements, etc.).	Pastor
_____	7. Keep information confidential until the agreed-upon time to share it.	All
_____	8. Repeat important information in multiple settings.	Parish Council
_____	9. Provide regular updates to parishioners regarding the transition process.	Parish Council

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<b>Date Completed</b>	<b>ACTION</b>	<b>RESPONSIBLE AGENT</b>
_____	10. Establish a plan to address information leaks and control rumors.  Keeper of the plan: _____	Parish Council
_____	11. Communicates the mission plan of the new parish as appropriate in a timely manner.	Pastor and Parish Council
_____	12. Seek assistance from the Archdiocesan Parish Consultant or the Office for Communication when in doubt.	

## 12. THE MINISTRY PLAN PROCESS

An important part of the merger planning process with long-range implications is the development of a new ministry plan. The parishes have likely worked on common plans in the past and have experienced shared staff and programs. As a merged parish and a single entity, a new ministry plan has the potential to build a strong sense of community around the mission of Christ.

There are three aspects of the ministry plan: mission, vision, and ministry goals. Each of these aspects is described in detail on the following page.

### MISSION STATEMENT

The mission statement is a brief, comprehensive description of the parish, its overall direction and unique role as ambassadors for Christ in a particular location. The merging parishes will decide whether to use the diocesan mission statement or to create a new statement of their own. The use of the diocesan mission has already been approved. New mission statements are reviewed by the Office for Planning and Councils.

### VISION STATEMENT

The vision statement is at the heart of the ministry plan process. The vision provides the parish with the description of what it hopes to accomplish and become in the near future. The vision also identifies a direction toward which the parish is moving. The vision of every parish should include the vision and priorities of the Archbishop because there is a common mission for the local church. However, the vision should also include specific statements about the future direction for the parish, pastoral leadership, and any property/building changes. The latter part is as important to the Archdiocese as it is to the parish. The parish vision provides advance notice about potential plans regarding further clustering or merging, staffing, and building or renovation projects.

Whereas a mission statement can go unchanged for long periods of time, the vision statement should change with each new plan. **The usual length of a parish planning cycle is 3 to 6 years.** The length of the plan should be long enough to accomplish the goals but short enough so that the parish council and committees who developed the plans can see the results and realize a sense of accomplishment.

### MINISTRY GOALS

Goals for each area of ministry flow from the vision statement which is rooted in the mission. Parish council committees are organized according to the areas of ministry: word, worship, service, and administration (if preferred, this can be further divided into finances, personnel, and buildings). Each area of ministry should have a new priority to focus the goal-setting. For example, the priority for lifelong formation of “strengthening of Catholic education and formation” can apply to the whole range of formation programs which a parish may conduct. A parish may wish to improve the quality of some or initiate a program for a group which is underserved.

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Other needs within the parish community may also drive some goals. In the area of administration for instance, the parish may envision a building or renovation project during the term of the plan and would certainly want it addressed. It is recommended that the initial plan should include no more than two to four goals for each area of ministry. This will keep the plan simple and focused. Results from a simple and focused plan are also easier to accomplish and therefore tend to build greater support for the merger.

The plan does not need to include goals for each ministry in the parish. Each parish has many ministries and almost all are effective. The vision focuses on those ministries which need to be expanded, improved or initiated over the next three to six years. The two to four goals will either strengthen existing ministries or add new ministries or programs.

### **MINISTRY PLAN PROCESS**

The ministry plan process is incorporated into the merger planning process. The plan process will be facilitated by the Archdiocesan facilitator. The development of the ministry plan begins in step 3 at the parish meeting. Ideas for the plan are gathered from those in attendance at the meeting. Step 4 includes the development of a draft of the ministry plan. In step 5, the plan is reviewed by the parish council.

The informational materials and forms for the vision/ministry plan process can be found on the Archdiocesan website, [www.archmil.org](http://www.archmil.org), under Vision 21.