

1. DIOCESE

MISSION STATEMENT OF THE DIOCESE OF RALEIGH

Convinced that it is the will of God that all people be saved, the mission of the Catholic people of the Diocese of Raleigh, North Carolina is to:

- Celebrate the Presence of God among us,
- Proclaim the good news of Jesus Christ;
- Build our faith community through the Eucharist;
- Minister to the needs of God's people

We will work to fulfill this mission through the collaborative involvement of all baptized people. We do this always as members of the Church universal in union with the Holy Father.

Agreed and accepted by the members of the diocesan councils of the Diocese of Raleigh, September 7, 1990.

DIOCESAN GOALS

Keeping the above issues in mind, we will work to meet the following Diocesan goals:

- a. Continuing to support parishes in evangelization and stewardship efforts;
- b. Recruiting and training lay leadership for ministry among our people
- c. Recruiting as creatively and aggressively as possible new candidates for priesthood in our Diocese, training our clergy to meet more recent ministerial demands and expectations;
- d. Regionalizing Diocesan services as much as possible while strengthening our communications effort;
- e. Welcoming all people and making ours a Church where ethnic diversity is acknowledged, affirmed, and supported;
- f. Reaching out to the poor, the elderly, and the youth among us and educating all our people to the plight of the many in our midst;
- g. Instructing all our people in our Catholic tradition of theology, faith, morals, and values upon which so much of our Catholic identity depends;
- h. Working toward a strong financial basis with which to face our challenging future with its many demands.

Agreed and accepted by the members of the Diocesan Councils of the Diocese of Raleigh, May, 2004.

1.4 DEANERIES

1.4.1 THE ROLE OF DEAN IN THE DIOCESE OF RALEIGH

1. Following the provisions of Canon 554 paragraph 2, a Dean (Vicar Forane) shall be appointed for a four year term, the term to begin in the month of September.
2. Consistent with the provisions of Canon 553 paragraph 2, the priests of the Deanery will select a priest of that Deanery to be recommended to the Bishop for appointment as Dean, who will then make the official appointment, either of the priest selected by the clergy of the Deanery or another who, in his judgment, is best suited to exercise the role.
3. If for any reason a Dean cannot complete his four year term due to transfer, resignation, retirement or death, the same procedure shall be followed for the selection of a successor to serve the remainder of the four year term.
4. The annual visitation by the Dean, as provided by Canon 555 paragraph 4, shall take place each year between April 1 and June 30.
5. Completed Deanery Visitation forms, together with the suggestions or recommendations of the Dean, are to be delivered to the Diocesan Chancery by July 1 of each year. The forms are available on the diocesan website under the Chancery.
6. Each Dean should have a Deanery Rubber Stamp to impress at the end of each section of Registers and Records inspected at the time of the annual visitation. The date of the visitation should be written clearly at the place where the stamp is impressed and initialed by the Dean.
7. Specific Legislation from the Revised Code of Canon Law pertaining to the office of the Dean is to be found in the pages that follow.
8. The Dean shall call the clergy of the Deanery together on a regular basis for social interaction.
9. The Dean will be responsible for calling the Deanery Council together on a regular basis. He will make sure there is an operating Deanery Council of Clergy, religious and laity.
10. The Dean shall serve as representative on the Priests' Council from his Deanery.

1.4.2 LIST OF PARISHES OF THE SEVEN DEANERIES

The Raleigh Diocese is comprised of seven deaneries:

Albemarle

Saint Anne, Ahoskie
Our Lady of the Seas, Buxton
All Souls, Columbia
Corolla Chapel, Corolla
St. Katharine Drexel, Maple
Saint Anne, Edenton
Holy Family, Elizabeth City
Holy Redeemer, Kitty Hawk
Holy Trinity, Nags Head
Annunciation, Ocracoke
Saint Joan of Arc, Plymouth
Saint Anne, Scotland Neck

Cape Fear

Saint Joseph, Burgaw
Saint Stanislaus, Castle Hayne
Our Lady of the Snows, Elizabethtown
Saint Jude the Apostle, Hampstead
Christ the King, Riegelwood
Saint Brendan the Navigator, Shallotte
Sacred Heart, Southport
Saint Mary, Gate of Heaven, Surf City
Transfiguration, Wallace
Sacred Heart, Whiteville
Immaculate Conception, Wilmington
Saint Mark, Wilmington
Saint Mary, Wilmington
UNC-Wilmington, Wilmington
Saint Therese, Wrightsville Beach

Fayetteville

Immaculate Conception, Clinton
Sacred Heart, Dunn
Saint Andrew Kim Chapel, Fayetteville
Saint Ann, Fayetteville
Saint Elizabeth Ann Seton, Fayetteville
Saint Patrick, Fayetteville
Good Shepherd, Hope Mills

San Juan, Ingold
Saint Mary, Laurinburg
Saint Francis de Sales, Lumberton
Our Lady of Guadalupe, Newton Grove
Sacred Heart, Pinehurst
Saint Elizabeth of Hungary, Raeford
Saint Andrew, Red Springs
Blessed Juan Diego, Robbins
Saint Stephen the First Martyr, Sanford
Saint Anthony of Padua, Southern Pines
Saint Isidore, Stedman

New Bern

Annunciation, Havelock
Infant of Prague, Jacksonville
Saint Egbert, Morehead City
Holy Spirit, Kinston
Saint Paul, New Bern
Saint Peter the Fisherman, Oriental
Saint Mildred, Swansboro
Mother of Mercy, Washington
Holy Trinity, Williamston

Piedmont

Blessed Sacrament, Burlington
Saint Bernadette, Butner
Saint Thomas More, Chapel Hill
UNC-Newman Center, Chapel Hill
Duke Catholic Student Center, Durham
Holy Cross, Durham
Holy Infant, Durham
Immaculate Conception, Durham
Saint Matthew, Durham
Saint James, Henderson
Holy Family, Hillsborough
Saints Mary and Edward, Roxboro
Saint Julia, Siler City
Saint Joseph the Worker, Warrenton

Raleigh

Saint Andrew the Apostle, Apex
Saint Mary Magdalene, Apex
Saint Michael the Archangel, Cary

Saint Bernadette, Fuquay-Varina
Saint Mary, Mother of the Church, Garner
Our Lady of the Rosary, Louisburg
Doggett Center for Catholic Campus Ministry at Aquinas House, Raleigh
Our Lady of Lourdes, Raleigh
Saint Francis of Assisi, Raleigh
Saint Joseph, Raleigh
Saint Luke the Evangelist, Raleigh
Saint Raphael the Archangel, Raleigh
Sacred Heart Cathedral, Raleigh
Saint Catherine of Siena, Wake Forest
Saint Eugene, Wendell

Tar River

Saint Ann, Clayton
Saint Elizabeth, Farmville
ECU Catholic Student Center, Greenville
Saint Gabriel, Greenville
Saint Peter, Greenville
Saint Mary, Goldsboro
Posada Guadalupana, Mount Olive
Saint Mary, Mount Olive
Saint John the Baptist, Roanoke Rapids
Immaculate Conception, Rocky Mount
Our Lady of Perpetual Help, Rocky Mount
Saint Catherine of Siena, Tarboro
Saint Therese, Wilson

1.5 THE DIOCESAN TRIBUNAL

The Tribunal is the Ecclesiastical Court for the Diocese of Raleigh. This court is mandated to apply the Church's law for the resolution of problems presented to it. The present *Code of Canon Law* concretizes and expresses in legal form the theology of the Second Vatican Council. This Code was promulgated by Pope John Paul II on 25 January 1983 and it became mandatory on the First Sunday of Advent, 1983. The Diocesan Tribunal studies, primarily, the alleged invalidity of marriages. The laws on marriage are contained in Book IV of the Code (The Office of Sanctifying the Church). The procedural laws, which guide the application of marriage laws to concrete cases, are found in Book VII of the Code (Juridical Procedures). Procedural laws are designed to protect the rights of all parties involved. In the application of the law, a Tribunal also adheres to the "Instruction of the Sacred Congregation [for the Discipline] of the Sacraments" (dated 15 August 1936) and the "Norms for the Process of the Dissolution of Marriages in Favor of the Faith," issued by the Congregation for the Doctrine of the Faith (dated 30 April 2001).

The Diocesan Bishop possesses legislative, executive and judicial authority in his Diocese. He, in turn, appoints the Judicial Vicar (also called the "Officialis") who, by virtue of his office, has ordinary judicial power. "The Judicial Vicar constitutes one Tribunal with the Bishop, ... (c.1420, §2). The Judicial Vicar is responsible for the Diocesan Tribunal and he serves as its Presiding Judge.

The Diocesan Tribunal consists of the Judicial Vicar, Associate Judges, the Defender of the Bond, Advocates, Notaries, Case Instructors, the Director and the Assistant Director. In this Diocese, Auditors are appointed to conduct interviews with Petitioners.

1.6 FINANCE COUNCIL OF THE DIOCESE OF RALEIGH

PARISH FINANCE COUNCILS

(Revised 05/19/2008)

GUIDELINES FOR PARISH FINANCE COUNCILS

In the 1983 Code of Canon Law, each parish is required to have a Finance Council. In Canon #537, the Code offers the following instructions:

“Each parish is required to have a finance council which is regulated by universal law as well as by norms issued by the diocesan bishop; in this council the Christian faithful, selected according to the same norms, aid the pastor in the administration of parish goods...”

These diocesan norms emphasize that the Finance Council is an advisory body to the pastor in matters pertaining to the ordinary and extraordinary aspects of financial administration. The relationship between the Council and the pastor should be supportive and collaborative. The Council is responsible for ensuring that the parish operates with financial integrity and within its financial resources. The pastor has responsibility for all decisions related to parish activities including financial; however, he shall take in to account the special responsibilities and skills of the Finance Council as it relates to financial matters. Disagreements on spending priorities that do not put the parish at serious financial risk should be addressed collaboratively but will ultimately be resolved by the pastor. If the Council has concerns about financial practices at the parish that could put the parish at *serious* financial risk, it is obligated to notify the pastor of those serious concerns. If the Council feels the pastor has not adequately addressed those serious *concerns*, the Council has an obligation to tell the pastor it intends to notify the Diocese about the concerns. That notification should be made through the Chief Operating Office/Chief Financial Officer’s office. Retaliatory action against the Finance Council may not be taken in response to such a report.

The Finance Council is envisioned as a body of parishioners known for their spiritual maturity and love of Christ and endowed with either special competence in financial matters or prudent judgment. They offer their time and talent as a Christian service to assist the pastor in the development and management of the parish financial resources so that the parish may effectively pursue the spreading of Christ’s gospel and love.

PARISH FINANCE COUNCIL POLICIES

In keeping with the directives of the 1983 Code of Canon Law, the Diocese of Raleigh presents the following policies for the organization and operating of a Parish Finance Council. The procedures should be given to every parish finance council member with acknowledgement of receipt.

A. GENERAL FUNCTIONS

- 1) The Finance Council must offer its technical expertise to the parish on fiscal matters including, but not limited to, financial systems and procedures, financial reports and financial budgets, plans, and forecasts.
- 2) The Finance Council is to aid and advise the pastor concerning the administration of parish funds and other assets within the limits of the Code of Canon Law and the directives of the Bishop.
- 3) For acts of extraordinary administration (currently, capital expenditures in excess of \$10,000), the pastor must consult the Finance Council and then obtain the consent of the Bishop via the Director of Business Services at the Diocese.

MEMBERSHIP

- 1) The membership of the Council is to be comprised of no less than four parishioners. The pastor shall appoint these members. The chairperson of the Council will be an ex-officio member of the Pastoral Council. The members should possess a working knowledge of financial affairs and be parishioners of outstanding integrity. The pastor presides over the Finance Council and must be in attendance (as he does over the Pastoral Council). No paid parish employee may serve as a voting member of the parish Finance Council, but a paid parish employee may serve in a staff role to the Council. A word of caution: Those who serve on this Council must not be chosen solely for their competence in finance, accounting, etc. They must, first of all, be persons whose foremost priority is the development of a community of faith and who see their concern with temporal affairs in this context.
- 2) Members of the Finance Council are to be appointed for a specified term of between two and four years. Terms may be renewed at the discretion of the pastor. Council members cannot be removed solely for speaking their mind or voicing disagreement with the pastor.

SPECIFIC DUTIES

- 1) The Council must meet no less than quarterly, or more frequently if required. Monthly meetings are the norm. The agenda should be established by the chair in consultation from the pastor.
- 2) After listening to the pastoral priorities in consultation with the pastor and Pastoral Council, the Finance Council shall participate with the pastor in the preparation of a yearly budget of income and expenditures for the review. The pastor should have final approval of the budget. This budget is to be prepared prior to the beginning of each fiscal year and a copy submitted to the Bishop as part of the annual presentation of the Parish Plan. This report should be approved by the Finance Council Chair. The budget is due June 30 of each fiscal year. The Parish and School Year End Report are due by July 31st each fiscal year. Quarterly financial reports are due on October 31st, January 31st, April 30th and July 31st.

- 3) The Finance Council must review the parish and school income and expense reports as frequently as necessary to maintain good financial oversight, but in no case less than each calendar quarter. This report should be approved by the Finance Council Chair. In addition, the Finance Council should review if applicable, capital campaign pledge income, redemption and expenditures and any relevant financial reports pertinent to the parish or school.
- 4) The Parish Finance Council must assist the pastor in the preparation of an annual financial report of income and expenditures for dissemination to the parishioners. This financial statement shall be distributed to the parishioners no later than 90 days following the close of each fiscal year. This report should be approved by the Finance Council Chair and a copy should be submitted to the Diocesan Director of Business Services.
- 5) An annual financial report following the format and time limits provided by the Diocesan Business Office shall be submitted by the pastor with his signature and with the signature of the Parish Finance Council chairperson and one other Council member.
- 6) The parish must submit a copy of the year end financial information presented to the parishioners to the Director of Business Services in the Business Office.
- 7) The Finance Council is responsible for developing financial plans for loan requests and capital expenditures, and is responsible for monitoring the financial performance against approved financial plans in order to ensure the financial solvency of the parish.
- 8) The Finance Council shall also assist the pastor in assuring the following fiscal functions are performed:
 - a) Timely debt payments
 - b) Timely payment of vendor invoices
 - c) Timely interest payments
 - d) Investment of surplus funds with the Diocese Deposit and Loan Program in compliance with Diocesan Policy
 - e) Assure adequate revenue.
 - f) Actively manage finance plans to ensure the parish/school finances are on track with projections.
- 9) Parish Finance Council members are to have complete and free access to all records which impact the financial affairs of the parish.
- 10) The Finance Council is responsible for special fund raising drives, as needed, and coordination of diocesan appeals and directives regarding fiscal policy.

- 11) The Finance Council should review all leases and contracts and ensure two signatures on leases and contracts greater than \$10,000. Leases and contracts over \$10,000 must be approved by the Pastor, Parish Council and Finance Council and submitted to the Director of Business Services at the Diocese for final approval.
- 12) The Finance Council must implement a dual signature policy on checks written for amounts over \$10,000. The signatures should be live signatures and not signature stamps. Checks remitted to the Diocesan Business Office will not require dual signatures.
- 13) The Finance Council should sign off on all cash handling procedures.
- 14) The Finance Council should ensure the record keeping of the financial records are maintained on the parish property and backups of financial and registration data are conducted once a week and kept off site.

CONCLUSION

The Parish Finance Council has the obligation of planning, providing for, and supervising the temporal affairs of the parish, making regular reports to the parishioners, the pastor, and the diocese, and recommending courses of action to the pastor. It oversees parish income and expenditures, oversees the development of an annual budget, and presents an annual financial report to the parish. It is the first and most comprehensive line of defense for ensuring against financial impropriety and financial problems. Those people who cannot accept these responsibilities should not serve as members.

1.7 PUBLICATIONS

Publications which may be ordered from the Catholic Center are:

- a. Guidelines for Establishing New Parishes from the Chancery
- b. Diocesan Health and Dental Insurance Plan booklet from the Office of Human Resources
- c. Lay Employees Retirement Plan from the Office of Human Resources
- d. Personnel Policies of the Diocese of Raleigh from the Office of Human Resources
- e. Marriage Nullity Procedures in the Diocese of Raleigh from the Tribunal
- f. Diocesan Planning and Construction Manual from the Office of Property & Construction

- g. Administrative Manual for Catholic School Principals from the Catholic Schools Office
- h. Planning Manual for Catholic School from the Catholic Schools Office
- i. Sacramental Guidelines from the Office of Liturgy
- j. Handbook for Parish Directors of Faith Development from the Office of Faith Development

1.8 DIOCESAN DISASTER/CRISIS RESPONSE POLICY

1.8.2 DIOCESAN COLLECTION IN PARISHES

The Diocesan Crisis Response Team will decide on the need for a collection in the parishes of the diocese within five days of the disaster and, with the Bishop's approval, the collection will be announced to all of the parishes as quickly as possible. The decision of the Team will be based on its best judgment as to whether or not the affected community can be expected to recover using only its own financial resources and on any other criteria relevant at the time. It is recognized that the best time to hold a successful collection is within a maximum of three weeks after the disaster.

The policy for use of collected monies for disasters in North Carolina is that they will be used "to respond to the current named disaster or to other disasters in the Diocese of Raleigh or in the state of North Carolina" (see #1.11.3 below).

The policy for use of collected monies for disasters outside of North Carolina is that they will be channeled through Catholic Charities USA which is the national Catholic disaster relief office as designated by the U.S. Bishops.

1.8.3 COMMUNICATIONS PLAN

1. The purpose is to determine as quickly as possible the extent of a disaster or crisis in a given area or community and to decide what, if any action the diocese or any of its agencies needs to take in response to the crisis. Natural disaster is defined as hurricane, flood, tornado, etc. Examples of a community crisis might be a massive explosion, widespread lay-off, or a terrorist incident. Examples of a parish crisis requiring diocesan assistance might be a devastating fire or the sudden or unanticipated departure of a pastor.
2. Diocesan Crisis Response Team
 - a. Communications Director
 - b. CSM Director
 - c. Chancellor
 - d. Vicar General
 - e. Others deemed crucial to specific response decisions (e.g. other department heads and pastor). Note: Meetings of the team may include telephone conference calls with participants.
3. Preparation To Implement The Plan
 - a. Pastors, pastoral administrators and CSM Deanery Directors are notified of the Communications Response Plan and of diocesan policies through the Parish Administrative Manual.
 - b. CSM deanery directors are responsible for local information; they or their designates will serve as the local contact persons and will be

trained in their responsibilities, including how to determine extent and significance of disaster/crisis and how to maintain communications during disasters.

- c. Each local contact person will maintain a list and establish relationships with public and private emergency management contacts that will provide us with specific observations and information in time of disaster.
- d. The Communications Director will maintain information on how to connect with local contacts during an emergency.

4. Planned Procedure When Disaster/Crisis Occurs

- a. Local or diocesan contact persons will immediately inform the Communications Director to report that a disaster/crisis has occurred. The Director will begin notifying Diocesan Crisis Response Team and alert them to be on stand-by for communication at any time and for probable meeting within 24 hours, either in person or by phone. The Local contact person and other key people on site will report to the Communications Director again within 4 hours and 2 times per day for the first 3 days OR as decided at the time.
- b. The local contact person begins the process of gathering information and either visits site and/or assigns another already at site to report back with first-hand knowledge as quickly and regularly as possible; this gathering of information is the basis for reports to the Communications Director.
- c. The Communication Director will utilized all means of gathering information relative to the extent and response to the crisis including State and County Emergency Management, N.C. Interfaith Disaster Response and Media
- d. As soon as possible after the disaster, the Communications Director will convene the Diocesan Crisis Response Team by all communications means available in order to: inform them of the facts; decide on who will do what; decide who else needs to be involved and what decisions have to be made; initiate communication plan relative to media.
- e. For as long as is necessary, the local contact person continues to gather information, including contacting other groups or agencies in the area to determine needs and responses. This information will be relayed to the Communications Director who will keep diocesan team and parishes updated on developments, information, needs and helpful responses. Communications Director will continue to call meetings of the Diocesan Crisis Response Team and to initiate contacts with the parishes and media as judged appropriate.

- f. Consultation and on-the-spot assistance will be provided by the Communications Department to local persons in dealing with the media

1.8.4 MEMBERSHIP IN N.C. INTERFAITH DISASTER RESPONSE (NCIDR)

As in the past, it will be the practice of the Diocese of Raleigh to respond to disasters in North Carolina through participation in the N.C. Interfaith Disaster Response (NCIDR). The Director of Catholic Social Ministries shall be the representative and liaison to the NCIDR. Among the ramifications of this partnership is the fact that money collected for disaster response in North Carolina, while reported to the national Catholic disaster relief office (i.e., Catholic Charities USA), shall not necessarily be sent to that office but will, as a matter of course, either be distributed through the N.C. Interfaith Disaster Response or through the discretion of the diocese/CSM.

1.8.5 COMMUNICATIONS PLAN RELATIVE TO PARISHES

The Communications Department will communicate regularly with all parishes during the follow-up to any significant disaster.

a. Information Reports To The Parishes Will Always Include:

1. Basic, up-to-the-minute facts of this specific situation and our diocesan response.
2. Aspects of standard policy, namely:
 - If a collection is held, whether called for by the diocese or not, please send all monies to the diocese for distribution according to diocesan guidelines.
 - Generally helpful responses: keep local emergency response groups informed as to facts and needs as they are reported; inform potentially helpful local networks that their volunteer services may be needed in the future (e.g., skilled construction volunteers, building materials donors)
 - Generally unhelpful responses: going to the site of the disaster without any specific role or connection to organized disaster rescue, relief or recovery; collections of used clothing, bedding or other household materials without clear knowledge of their usefulness or plans for organized distribution.
3. The reminder that parishes will be kept informed and/or can call the communications Director to learn the most current information on when other resources are best “collected” or donated.
4. Any other specific information which the Team agrees should be put forth at that time.

Revised May, 2003

2 PARISHES AND MISSIONS

- 2.1 Parishes are established with geographic boundaries to serve all people within those boundaries (Canons 515, paragraph 1, 518). In those instances in which persons choose to become members of a parish other than the territorial parish in which they live, the pastor of the territorial parish in which they live should first be informed. They should then register in their chosen parish and actively support it. Parish affiliation, or the lack of it, should not be used as a reason to deny sacramental or pastoral ministry. However, where verification of records or other requirements warrants, sacraments may be delayed.

2.1.1 MOTHER PARISH POLICY

Introduction

For many years the Diocese of Raleigh has had in place a practice, call it an unwritten policy, whereby older established parishes assisted formation of new parishes by purchasing the land for the new parish. The diocese also assisted by providing interest free loans for the purchase of land for new parishes.

Recently, a number of difficult to answer questions have arisen which lead to a review of our Mother Parish Policy. Seventeen pastors were asked for their views on the matter. Two opinions were nearly unanimous among those interviewed. They thought that the policy is a good one which should be continued, and that it should be in writing. The reasons most often mentioned in support of these views were that the policy has worked pretty well in helping to start new parishes, and that the evangelization aspect of one parish helping to start another was a desirable feature of the program.

Specifics of the written policy should be based on our experience over the past twenty years or so. What worked should be continued. What did not should be abandoned. What was ambiguous should be clarified. With these guidelines in mind, the following shall be the Mother Parish Policy of the Diocese of Raleigh.

Guidelines for the Establishment of a Station/Mission/Parish

1. Pastor/Administrator of the parish sends an official letter of request/recommendation to the Vicar General regarding the erection of a station/mission of his parish.
2. Pastor/Administrator receives consent and agreement from the pastors of neighboring missions/stations in his Deanery.
3. The Dean of the Deanery in which said mission/station is to be erected approves the Pastor/Administrator's request to erect a mission/station of his parish.
4. The recommendation is brought by the Vicar General/Dean to the Council of Priests' meeting for an unanimous vote of approval by the Bishop and the Council of Priests.
5. The Vicar General's Office issues a Decree.
6. The same process as found in the above steps 1-5 applies to the establishment of a parish

Implementation Process

At the time of announcement of establishment of a new mission or parish, (herein after, parish shall include the possibility of meaning a mission) there shall also be announcement of the mother parish or parishes. If more than one parish is identified as mother parish, the share of each will be specified.

Mother parish(s) will ordinarily be contiguous to the new parish. If the new parish is carved out entirely from an existing parish, normally the mother parish would be only that parish from which the new parish is created. However, if geography, current or predicted attendance patterns, financial capability or other factors mitigate, this need not necessarily be the case.

If the new parish boundaries fall in more than one older parish, either one or more parishes may be the mother parish. If there are multiple mother parishes, a suggested sharing might be based on proportionate share of parishioners contributed to the new parish. However, any other reasonable basis may be used.

The recommendation of mother parishes' identifications will be the responsibility of the Deans and deaneries recommending the establishment of the new parish. Approval of the mother parish(s) shall be the responsibility of the Chancellor after consultation with the Finance Council.

The obligation of the mother parish(s) shall be to purchase the land for the new parish. The amount and location of the land shall be approved by Building and Real Estate Commission. If a parcel of land is purchased, which later is determined to be inappropriate for the new parish, the land shall be considered an asset of the new parish. It will then be the responsibility of the new parish to sell the inappropriate site and acquire a suitable site on some basis which is mutually agreeable to it and the diocese. The mother parish's responsibility will have been discharged when it made its good faith purchase.

If it is mutually agreed by the new parish and the mother parish(s), in lieu of purchasing land, the mother parish(s) may give cash to the new parish for the purpose of purchasing land. If this alternative is chosen, the cash so given shall be placed in an interest bearing account with the diocese and restricted for land purchase. If the amount exceeds the land purchase cost, the excess may be applied to construction. Whereas the diocese will provide an interest free loan for the purchase of land for new parishes, mother parishes with cash available for a land purchase shall be expected to pay cash for the land to the extent it can. Notwithstanding, the mother parish may retain up to 20% of its insured plant value or \$100,000, whichever is less, in savings for eventual use for maintenance and other purposes. This savings amount is in addition to the 45 days operating reserve allowed by the Diocesan Parish Loan and Deposit Policy.

If a mother parish believes it cannot afford to fulfill the role assigned to it, it can request the Finance Council for relief in either the dollar amount or the terms of the obligation. There may be times when no mother parish designation is possible. In these cases the Diocese may assume the role of mother parish.

The maximum number of times a parish shall be asked to be a mother parish is once every ten years with a limit of three times in 50 years. The ten year

restriction can be reduced to five years if the mother parish has doubled in size since the last time it purchased land for a new parish.

Daughter parishes are encouraged to retain a relationship with the mother parish throughout their life. This can be done in any way deemed appropriate. The purpose of continuing the relationship is to encourage gratitude and pride in parishes and to help build extra-parochial relationships.

If a new parish is not built within a reasonable period of time, the mother parish may request a determination if there continues to be plans to build the new parish. The procedure for opening and closing parishes will be used to determine a response to this request. If it is determined that a new parish will not be built as previously planned, the land or money will be returned to the mother parish.

2.2 PASTORAL COUNCIL NORMS

2.2.1 PRINCIPLES AND GUIDELINES

The basic document which identifies the role and relationship of the collegial structures in the Diocese of Raleigh was promulgated by Bishop Gossman in 1982 and is entitled: The Collegial Church – A Working Document. Some of the basic principles for Pastoral Councils are:

1. It is mandatory that each parish have a Pastoral Council. Whether or not a mission church has a council should be decided on the local level – some will have them but others may not.
2. At least three-fourths of the Pastoral Council is to be selected by the parish at large in an annual election, preferably held during Advent.
3. The pastor may, but does not have to, appoint up to one-fourth of the members to insure balance on the council and to see that all segments of the parish are represented.
4. The Chairperson of the Parish Finance Council is an automatic member of the Parish Pastoral Council.
5. Terms of office should be designated in the Constitution or By-laws.
6. Meetings of the Council should be held with regularity, preferably once a month, but no less than every other month.
7. It is the function of the Pastoral Council to “investigate everything pertaining to pastoral activities, to weigh them carefully, and to set forth practical conclusions concerning them so as to encourage conformity of the life and actions of the People of God with the Gospel” (Motu Proprio, Ecclesiae Sanctae).
8. Councils should elect a chairperson and conduct business according to established procedures. Proposals by the Council must be ratified by the pastor. If it is the pastor’s considered decision that a proposal should be refused, he may do so. By a two-thirds vote, the Pastoral Council may appeal the rejection to the dean. If the dean’s decision is not satisfactory to the pastor or to the Council, it may be appealed to the Bishop, whose decision is final.
9. The Pastoral Council should be governed by a written Constitution which must be approved by the Bishop.
10. It is the responsibility of the Pastoral Council and the pastor to submit a Parish Plan according to guidelines established by the Chancery. This should be submitted to the Bishop by June 30 of each year.
11. No group or office may interfere with the working of the Pastoral Council. All boards, commission and committees of a parish except for the Parish Finance Council, are responsible to the Pastoral Council.

With the promulgation of the 1983 Code of Canon Law, specific legislation regarding Pastoral Councils was mandated. Thus, the following guidelines are now necessary in addition to the above mentioned basic principles.

Canon 536

1. “After the diocesan bishop has listened to the Presbyteral Council and if he judges it opportune, a Pastoral Council is to be established in each parish; the pastor presides over it, and through it the Christian faithful along with those who share in the pastoral care of the parish in virtue of their office given their help in fostering pastoral activity.”
2. “This Pastoral Council possesses a consultative vote only and is governed by norms determined by the diocesan bishop.”

2.2.2 Canon 536, paragraph 1 – Establishment and Pastor Presiding

The 1983 Code of Canon Law states that a Pastoral council be established and that the pastor presides over it. The pastor presides as a bishop does with the Diocesan Pastoral Council or Priests’ Council. This does not mean that the pastor must chair every meeting (The Collegial Church, page 9, #6). A pastor presides by making certain that the scope of the Councils’ concerns reflect the entire mission of the church, by enabling Council members, by making sure they have training, by assisting in formulating the council agenda, and by sharing in the dialogue that leads to the formulation of recommendations. Although the pastor is not technically a member of the Council, the Council cannot meet without him.

Canon 536, paragraph 2 – A Consultative Role

The Pastoral Council in the new code is seen as a structure of consultation and consensus. It is a planning council, not a coordinating council. It is where cooperative planning occurs and where the old distinction between policy and administration is not implied. The Pastoral Council is a consultative planning group, planning the mission of the parish church with the pastor. Technically, the pastor is not a member of the Pastoral Council. This is typical of the structure of an ecclesial advisory body, e.g., bishop and Priests’ Council, pastor and Pastoral Council.

The consultation of the Pastoral Council is essential in the decision-making process, but the Pastoral Council is not the decision maker. The norms for the decision-making process are outlined in The Collegial Church, pages 5-6.

The process of decision-making, whether by an individual or individuals working as a group, involves several distinct but interrelated steps.

The first step is to ascertain and study in a thorough manner all the available facts. Decisions relate to concrete reality and not to abstract concepts. The facts must be available to all who participate in the decision-making process.

Secondly, there must be, to the extent that it is possible, a common understanding of the facts so that the differences resulting from various interpretations of the data are minimized.

The third step involves arriving at a consensus of the best way or ways to proceed. Judgment involves affirming or recommending the practical consensus.

The completion of the process takes place when the judgment is accepted, rejected or delayed. One of many options may be selected. A recommended policy may be rejected. A choice may be made to delay any action until resources are available or other recommendations are forthcoming. Whatever this final step is called, it is an act distinct from judgment. In this final act of a complex process, the bishop or pastor acts as legislator.

Collegial bodies propose directives, norms, policies, laws, and priorities. A pastor, dean and a bishop ultimately accept, reject, select, delay, implement, or ratify the proposals made by such bodies. To describe the work of the councils as advisory or consultative is inadequate; neither is it accurate to suggest that only the pastor or bishop is involved in the legislative process. Both the bishop or the pastor and the councils must assume a proper relationship in the exercise of their legitimate roles, for neither can function well without the other.

2.2.3 MEMBERSHIP

In accord with Canon 512 regarding the Diocesan Pastoral Council, which states that members should be “Christian faithful who are in full communion with the Catholic Church,” elected members of local pastoral councils should also be in full communion with the Catholic Church. Chairpersons should be chosen from membership in full communion (The Collegial Church, page 9, #2-3).

It is recommended that others who share in the pastoral care of the parish in virtue of their office would include, associate pastor(s), members of a team ministry, and deacons [James A. Coriden, Thomas J. Green, Donald E. Heintschel (ed.) The Code of Canon Law A Text and Commentary, New York: Paulist Press, 1985. (Canon 536, page 432)].

When a parish loses its pastor, meetings of the Pastoral Council cease until the new pastor reconvenes the Council unless the Bishop deems it necessary for the Council to continue to function for the good of the parish.

2.2.4 WHAT A PASTORAL COUNCIL IS AND IS NOT

The Pastoral Council is that leadership group chosen on the local level to assist and guide the parish to achieve its own mission. Members of the Pastoral Council are chosen by the entire parish community to develop and sustain the various

ministries that are required to bring the Lord's work to fruition in the community. The Pastoral Council shares with the pastor the responsibility for the good of the parish and all its work (The Collegial Church, page 8).

A Pastoral Council is meant to be representative of the whole people of God without members being considered necessarily deputies of a specific constituency. Each member of the Council should have the sense of being a servant of the entire parish. This representative concept should not be equated with the governmental model of legislative deputies (Commentary page 411 referring to Canon 512).

The Pastoral Council is not a financial council. Church law now requires that "each parish is to have a Finance Council which is regulated by universal law as well as by norms issued by the diocesan bishop; in this Council the Christian faithful...aid the pastor in the administration of parish goods..." (Canon 537) The 1983 Canon Law makes very clear what was not very clear before: the Pastoral Council is not a legislative body. A pastor establishes a council to expand and enhance the decision-making process of 1) pastoral planning and goal setting; 2) developing and implementing pastoral programs; 3) improving pastoral services; and 4) evaluating pastoral effectiveness.

2.2.5 CONCLUSION

The parish is a community of the people of God, entrusted to an ordained priest or pastoral administrator for pastoral care under the authority of a bishop; the ministry of the pastor is to gather people in the Spirit, the Gospel and the Eucharist for the sake of the Kingdom. The Pastoral Council is a way in which the values and concerns of the people of God can work together in partnership for the Kingdom. "This mission and the Vatican Council's vision of the role of each and every one of us in its fulfillment calls us to stretch ourselves to yet unimagined limits. This would be impossible if it were not that God's grace everywhere abounds" (The Collegial Church, page 13).

2.2.6 GENERIC PASTORAL COUNCIL CONSTITUTION

PREAMBLE

The parish is a community of the people of God, entrusted to an ordained priest for pastoral care under the authority of a bishop; his ministry is to gather people in the Spirit of, the gospel and Eucharist for the sake of the Kingdom. "The mission and the II Vatican Council's vision of the role of each and every one of us in its fulfillment calls us to stretch ourselves to yet unimagined limits. This would be impossible if it were not that the grace of God everywhere abounds". (p. 13 Collegial Church, by Bishop Gossman, 1982)

ARTICLE I

PURPOSE

The pastoral council in the new code is seen as a structure of consultation and consensus. It is a planning council not a coordinating council. It is where cooperative planning occurs. The pastoral council is a consultative planning group, planning the mission of the parish church with the pastor.

The consultation of the pastoral council is essential in the decision making process but the pastoral council is not the decision maker.

ARTICLE II

MEMBERSHIP

1. Eligibility. Any registered parishioner who is in full communion with the Catholic Church and has reached eighteen years of age shall be eligible for election or appointment by the pastor.
2. Representation. The council shall consist of twelve (12) elected members. In addition the pastor, may, but does not have to, appoint four (4) others. All members of the council whether elected or appointed shall be considered full voting members. (Numbers keeping $\frac{3}{4}$ & $\frac{1}{4}$ ratio).
3. Elections. Elections are to take place somewhere around Advent season.
4. Chair of Finance. By diocesan regulation the chairperson of the finance council is an automatic member of the pastoral council. This does not mean that the pastor must choose a member of the pastoral council to chair the finance committee, but rather, having appointed the finance committee separately as per diocesan guidelines, the chair of the finance committee becomes an automatic member of the pastoral council. This person is not to be considered as a pastoral appointee.
5. (Optional in small parishes) Others, who share in the pastoral care of the parish, by virtue of the position they hold, e.g., associate pastor, school principal, or members of certain organizations, etc., (COMMENTARY ON THE CODE p. 432), may be part of the council, at the discretion of the pastor. These persons may or may not be voting members, as the pastor directs.

ARTICLE III

ORGANIZATION

1. Officers. Officers of the council shall consist of a Chairperson, Vice-Chair and Secretary. These officers will be elected from within the total council membership. Pastoral appointees may not be excluded from holding office.
2. Meetings. The council shall meet on a regular basis, preferably once a month but no less than every other month.
3. Committees. The following are standing committees of the Council:

- g. Communications Committee
- h. Education Committee
- i. Liturgical Committee
- j. Maintenance Committee
- k. Outreach Committee
- l. Social Committee
- m. Special Projects Committee

ARTICLE IV

BY-LAWS AND AMENDMENTS

Provided that they do not contravene any of the provisions of these articles, By-Laws may be established by the pastoral council with the approval of the pastor. By-Laws may be amended or repealed in the same manner. Copies of By-laws must be sent to the Bishop's office for the parish file. Amendments to this constitution must be approved by the Council and the pastor. Constitutional amendments must be approved by the Bishop before they take effect.

2.3 PARISH FINANCE COUNCILS

2.3.1 GUIDELINES FOR PARISH FINANCE COUNCIL

In the 1983 Code of Canon Law, each parish is required to have a Finance Council. In Canon 537, the Code offers the following instructions:

“Each parish is required to have a finance council which is regulated by universal law as well as by norms issued by the diocesan bishop; in this council of Christian faithful, selected according to the same norms, aid the pastor in the administration of parish goods....”

These diocesan norms emphasize that the Finance Council is an advisory body to the pastor in matters pertaining to the ordinary and extraordinary aspects of financial administration. The relationship between the Council and the pastor should be supportive and collaborative. The Council is responsible for ensuring that the parish operates with financial integrity and within its financial resources. The pastor has responsibility for all decisions related to parish activities including financial; however, he shall take in to account the special responsibilities and skills of the Finance Council as it relates to financial matters. Disagreements on spending priorities that do not put the parish at serious financial risk should be addressed collaboratively but will ultimately be resolved by the pastor. If the council has concerns about financial practices at the parish that could put the parish at serious financial risk, it is obligated to notify the pastor of those serious concerns. If the council feels the pastor has not adequately addressed those serious concerns, the Council has an obligation to tell the pastor it intends to notify the Diocese about the concerns. That notification should be made through

the Chancellor's office. Retaliatory action against the Finance Council may not be taken in response to such a report.

The Finance Council is envisioned as a body of parishioners known for their spiritual maturity and love of Christ and endowed with either special competence in financial matters or prudent judgment. They offer their time and talent as a Christian service to assist the pastor in the development and management of the parish's financial resources so that the parish may effectively pursue its basic mission of spreading Christ's gospel and love.

2.3.2 PARISH FINANCE COUNCIL POLICIES

In keeping with the directives of the 1983 Code of Canon Law, the Diocese of Raleigh presents the following policies for the organization and operating of a Parish Finance Council.

A. GENERAL FUNCTIONS

- 1) The Finance Council shall offer its technical expertise to the parish on fiscal matters including, but not limited to, financial systems and procedures, financial reports and financial budgets, plans, and forecasts.
- 2) The Finance Council is to aid and advise the pastor concerning the administration of parish funds and other assets within the limits of the Code of Canon Law and the directives of the Bishop.
- 3) For acts of extraordinary administration (currently, capital expenditures in excess of \$10,000), the pastor must consult the Finance Council and then obtain the consent of the Bishop via the Director of Business Services at the Diocese.

B. MEMBERSHIP

- 1) The membership of the Council is to be comprised of no less than four parishioners. The pastor shall appoint these members. The chairperson of the Council will be an ex-officio member of the Pastoral Council. The members should possess a working knowledge of financial affairs and be parishioners of outstanding integrity. The pastor presides over the Finance Council and must be in attendance (as he does over the Pastoral Council). No paid parish employee may serve as a voting member of the parish Finance Council, but a paid parish employee may serve in a staff role to the Council. A word of caution: Those who serve on this Council must not be chosen solely for their competence in finance, accounting, etc. They must, first of all, be persons whose foremost priority is the development of a community of faith and who see their concern with temporal affairs in this context.

- 2) Members of the Finance Council are to be appointed for a specified term of between two and four years. Terms may be renewed at the discretion of the pastor. Council members cannot be removed solely for speaking their mind or voicing disagreement with the pastor.

C. SPECIFIC DUTIES

- 1) The Council shall meet no less than quarterly, or more frequently if required. Monthly meetings are the norm. The agenda should be established by the chair in consultation from the pastor.
- 2) After listening to the pastoral priorities in consultation with the pastor and Pastoral Council, the Finance Council shall participate with the pastor in the preparation of a yearly budget of income and expenditures for the review. The pastor should have final approval of the budget. This budget is to be prepared prior to the beginning of each fiscal year and a copy submitted to the Bishop as part of the annual presentation of the Parish Plan. This report should be approved by the Finance Council Chair. The budget is due June 30 of each fiscal year. The Parish and School Year End Report are due by July 31 east fiscal year. Quarterly financial reports are due on October 31, January 31, April 30 and July 31.
- 3) The Finance Council shall review the parish and school income and expense reports as frequently as necessary to maintain good financial oversight, but in no case less than each calendar quarter. This report should be approved by the Finance Chair. In addition, the Finance Council should review if applicable, capital campaign pledge income, redemption and expenditures and any relevant financial reports pertinent to the parish or school.
- 4) The Parish Finance Council shall assist the pastor in the preparation of an annual financial report of income and expenditures for dissemination to the parishioners. This financial statement shall be distributed to the parishioners no later than 90 days following the close of each fiscal year. This report should be approved by the Finance Council Chair and a copy should be submitted to the Diocesan Director of Business Services.
- 5) An annual financial report following the format and time limits provided by the Diocesan Business Office shall be submitted by the pastor with his signature and with the signature of the Council chairperson and one other Council member.
- 6) The Council should arrange for an annual review of the financial procedures and records of the parish based upon the guidelines established by the Diocese. The review shall be conducted by competent individuals

who may be parish finance council members, parishioners, or external auditors.

- 7) The Finance Council is responsible for developing financial plans for loan requests and capital expenditures, and is responsible for monitoring the financial performance against approved financial plans in order to ensure the financial solvency of the parish.
- 8) The Finance Council shall also assist the pastor in assuring the following fiscal functions are performed:
 - a) Timely debt payments
 - b) Timely payment of vendor invoices
 - c) Timely interest payments
 - d) Investment of surplus funds with the Diocese Deposit and Loan Program in compliance with Diocesan Policy
 - e) Assure adequate revenue
 - f) Actively manage finance plans to ensure the parish/school finances are on track with projections
- 9) Parish Finance Council members are to have complete and free access to all records which impact the financial affairs of the parish.
- 10) The Finance Council is responsible for special fund raising drives, as needed, and coordination of diocesan appeals and directives regarding fiscal policy.

D. CONCLUSION

The Parish Finance Council has the obligation of planning, providing for, and supervising the temporal affairs of the parish, making regular reports to the parishioners, the pastor, and the diocese, and recommending courses of action to the pastor. It oversees parish income and expenditures, oversees the development of an annual budget, and presents an annual financial report to the parish. It is the first and most comprehensive line of defense for ensuring against financial impropriety and financial problems. Those people who cannot accept these responsibilities should not serve as members.

2.4 DEANERY PROGRAMS

When parishes in a deanery agree on a deanery-wide program promoted and coordinated by the Dean (cf. Canon 555, paragraph 1), individual pastors and parishes have a responsibility to support such programs.

2.5 SACRAMENTAL LIFE

Diocesan guidelines exist in the Sacramental Guidelines available from the Office of Liturgy to be used for the following:

1. Rite of Christian Initiation of Adults
2. Infant Baptism
3. Confirmation
4. Penance
5. First Communion
6. Marriage

2.5.1 RCIA GUIDELINES

It is the norm in the Diocese of Raleigh that the Rite of Christian Initiation be used in the process of instruction and baptism/reception of all those over the age of seven (cf. Diocesan Sacramental Guidelines).

1. The period of the Catechumenate for unbaptized adults is to extend for at least one full year from the celebration of the Rite of Becoming Catechumens until the Rite of Election. Those seeking to abbreviate this period must consult the Bishop before doing so.
2. The Sacrament of Penance is celebrated at a time prior to the Rite of Reception into Full Communion for those adults baptized into other Christian denominations. Unbaptized adults do not celebrate the Sacrament of Penance prior to receiving the Sacraments of Initiation (Baptism, Confirmation, and Holy Eucharist).
3. Conditional baptism, when necessary, is to be celebrated privately at a time prior to full reception into the Catholic Church. The Profession of Faith, Confirmation, and Holy Eucharist are then celebrated publicly. Please contact the Office of Liturgy, the Office for Lay Ministry, or the Tribunal for information regarding churches without valid baptism.
4. Priests who instruct and receive converts into the Church by Baptism or a Profession of Faith are to confirm them when they are Baptized/received.
5. Because it is the pre-eminent celebration of the Paschal Mystery, unbaptized adults normally celebrate the sacraments of initiation at the Easter Vigil. When this is not possible, please consult the Sacramental Guidelines for suggestions of other appropriate feasts.

6. It is preferable that baptized Christians of another denomination not be received into full Communion at the Easter Vigil (National Statutes, 33). Reception should ordinarily take place at the Sunday Eucharist of the parish community (NS, 32). Please consult the Sacramental Guidelines for suggested dates.

2.5.2 CONFIRMATION

All priests assigned to a parish for ministry have the faculty to confirm:

1. Adults whom they baptized within the Rite of Christian Initiation.
2. Adults within the Rite of Reception into Full Communion unless the person has already been validly confirmed.
3. Baptized, unconfirmed adult Catholics under the following conditions:

The Bishop of Raleigh gives permission to priests to confirm baptized Catholics, who, with or without fault, were never confirmed, and who wish to complete the sacraments of initiation through reception of confirmation in their parish at the Easter Vigil, Easter Sunday, the Sundays of the Easter Season, Pentecost, All Saints Day or the closest Sunday, and the Feast of Christ the King. Permission may be presumed upon the sending of the names of those to be confirmed to the Chancery.

4. For confirmation of adults in military parishes, in addition to the dates listed above in #3, the Bishop of Raleigh gives permission for the following dates: July 25, the Feast of St. James; August 15, the Feast of the Assumption; September 15, the Feast of Our Lady of Sorrows; and October 7, the Feast of Our Lady of the Rosary.

2.5.3 SPECIAL MINISTERS OF THE EUCHARIST

Special ministers of the Eucharist are appointed by the Bishop for a period of three years upon nomination by the pastor. Names are to be sent to the Chancery. New Special Ministers of the Eucharist should be instructed in their duties and installed in a public ceremony. As an aid to this installation please refer to the Diocese of Raleigh Manual of Liturgical Ministries for the Rite of Commissioning Special Ministers of Holy Communion pages 83-84 and the Ministry of the Eucharist pages 37-42.

2.5.4 SUNDAY WORSHIP

Once a year, if, after serious attempts to find a replacement, he has been unable to do so, the pastor may plan an alternate Sunday worship for the parish conducted by a Sister/Brother and/or layperson.

2.5.5 MARRIAGE

1. Since non-Catholics are not in full communion with the Catholic Church, they are permitted to receive the Eucharist only under certain legislated circumstances (c. 844). If the non-reception of the Eucharist creates a problem for the parties to the marriage, the priest should encourage the couple to have the marriage without the celebration of the Eucharist.
2. Marriages between Catholics or between a Catholic and a non-Catholic baptized person are “to be celebrated in a parish church” (c. 1118, §1). For a just and reasonable cause, “The local ordinary can permit marriage to be celebrated in some other suitable place” (c. 1118, §2). “Marriage between a Catholic party and a non-baptized party can be celebrated in a church or in some other suitable place” (c. 1118, §3).
3. The following forms must be used and can be ordered from the Chancery or obtained on line at the diocesan website.
 - Information for Automated Marriage Forms (This form is to be submitted to the Chancery in a timely manner [at least three weeks prior to the marriage] and, when an application for a dispensation from another diocese is required, four weeks prior to the marriage).
 - Form A – Pre-Nuptial Investigation – Bride and Groom
4. Form B – Pre-Nuptial Investigation – Freedom to Marry Testimony and Parental Consent is to be used when the party or parties are not known to the pastoral minister.
5. For each marriage performed the following records must be completed:
 - Information for Automated Marriage Form – to be sent to the Chancery prior to a wedding.
 - Certificate of Marriage – to be sent to the Chancery after all marriages performed, including those of two Catholics that did not require Permission/Dispensation.
 - Form A – Pre-Nuptial Investigation – to be filed in parish where marriage is performed.
 - Form B – Freedom to Marry – to be filed in parish where marriage is performed, if used.
 - Notification of Marriage to Parish of Baptism (to be mailed).
6. After a marriage has been celebrated, it is to be noted in the marriage register of the parish in which the marriage took place (c. 1121, §1).

2.5.6 OFFERINGS (FEES) FOR SACRAMENTS

Canon 848 states “The minister should ask nothing for the administration of the sacraments beyond the offerings defined by the competent authority, always being careful that the needy are not deprived of the help of the sacraments because of their poverty.”

It is the mind of the competent authority, the Bishop, that there be no fees for the celebration of any sacrament in the Diocese of Raleigh.

In a case where a parish is asked to allow their church to be used by a non-parishioner, for the sacrament of marriage, the parish can request an offering not to exceed \$200.00 for the use of the building to pay for preparation, cleaning, lighting and heating or air conditioning of the church. This fee is to be explained in this fashion to avoid an assumption as fee for a sacrament.

This regulation concerns only the policy of fees for sacraments. It does not reflect fees for the ministry of music needed in the celebration of the sacraments. These regulations need to be determined by the pastor of the local church and those involved in the ministry of music.

While a funeral liturgy is not a sacrament, the principles surrounding the sacraments concerning fees are to be applied here as well. At the time of death of a loved one what we want people to remember is our consolation and assistance and not a bill for services rendered.

It is the policy of the Diocese of Raleigh that a stole fee (free will offering of the people for the celebration of the sacrament) is given to the church and not the minister.

As of November 18, 2003, on the Dedication of the Basilicas of the Apostles Peter and Paul in Rome, this policy is now in effect in the Diocese of Raleigh by the Most Reverend F. Joseph Gossman, Bishop of Raleigh.

2.6 MARRIAGE TRIBUNAL CASES

Marriage cases involving a declaration of nullity/invalidity are adjudicated by a single judge (by virtue of the faculties granted by the National Conference of Catholic Bishops and according to c. 1425, §4) or by a Collegiate Tribunal (the Presiding Judge and two Associate Judges). The Defender of the Bond is required to defend the presumed validity of the bond of marriage through the presentation of relevant evidence recorded in the Acts of the case. Advocates for the Petitioner and the Respondent are appointed. Advocates may represent the parties and guide them throughout the process. The Notary authenticates, by signature and/or seal, the various documents pertaining to a given case.

The Director of the Tribunal may supervise the gathering of the evidence, the interrogation of witnesses, the appointing of Auditors, and the assignment of Advocates. This process is called the "Instruction" of the case. In this Diocese, these tasks are performed by the Case Instructors. The Case Instructors also advise the Judicial Vicar when a case has progressed to the point of adjudication.

The types of marriage cases studied by the Diocesan Tribunal are generally divided into two categories: Formal and Informal. The focus for Formal and Informal cases is validity/invalidity (nullity). Informal cases are either Documentary or Administrative.

There are two other types of Marriage cases submitted to the Tribunal for assessment. These are Privilege of the Faith cases (Pauline Privilege and Petrine Privilege cases). The study of these cases is not focused on validity/invalidity (nullity). The investigation of these types of cases must determine whether or not the activation of the privilege (the dissolution of a previous non-sacramental and presumed valid marriage) is justified by the demonstrable presence of certain conditions. Pauline Privilege cases are processed at this Tribunal. As is the custom in the U.S. tribunals, Petrine Privilege cases at this Tribunal are investigated as Formal cases.

The greater portion of the work of the Diocesan Tribunal involves Formal Nullity (Invalidity) cases. The Tribunal does not annul marriages or grant annulments. An affirmative response to a petition for a declaration of nullity is interpreted as a morally certain judgment derived from facts, authentic documents and sworn testimony. A judge, in rendering an affirmative decision, is morally certain that at least one element (e.g., indissolubility) essential for a valid marital covenant (according to Church law) was absent at the time of the marriage. If a marriage was null (invalid) from the beginning, it cannot be an obstacle to the entrance of a party (or parties) into another marriage in the Catholic Church.

A decision, in formal process, rendered by the Diocesan Tribunal affirming the nullity of a marriage must be confirmed by the Court of Second Instance – in our case, the Court of Appeals of the Province of Atlanta. The Definitive Decision of the Diocesan Tribunal is reviewed by the Collegiate Tribunal (three judges and a Defender of the Bond) of the court of Appeals and a Confirmatory Decree is then issued by that Tribunal. Only when the confirmatory Decree has been issued may the decision of the Diocesan Tribunal become effective.

Informal cases are less time consuming and less complex. These cases usually involve: 1) the absence of the Catholic form of Marriage (i.e., a marriage celebrated by a properly delegated priest or deacon in the presence of two witnesses) between two Catholics or a Catholic and a non-Catholic party; 2) the existence of an invalidating impediment (such as a previous valid bond from which no declaration of nullity had been granted and the previous spouse was living at the time the second marriage was attempted); or 3) cases in which a dispensation was either not granted or granted invalidly.

The presentation of all categories of cases to the Tribunal is encouraged. The Tribunal is prepared to assist in this important pastoral work of healing and reconciliation. With the cooperation of parish personnel, the Tribunal will act as promptly and efficiently as possible.

2.6.1 INFORMAL CASES

In general, the Informal Cases handled by the Tribunal are:

5. Lack of Canonic Form
6. *Ligamen* (Previous Bond)

7. Pauline Privilege
8. Petrine Privilege (will be studied as a Formal Case)
9. Radical Sanation (*Sanatio in Radice*)

Instructions for the presentation of each type of case are listed below.

The Petition forms for Lack of Canonical Forms cases are distributed to parishes. When these forms are completed, they are submitted with the required documents to the Tribunal. With the exception of the Lack of Canonical Form cases, parish personnel instruct the Petitioner to contact the Tribunal directly for the investigation of his/her case. When an evaluation of the proposed case is completed by the Tribunal staff, the proper Petition form (specific to the case) and other directives will be given/sent to the Petitioner from the Tribunal.

2.6.2 INSTRUCTIONS FOR PRESENTATION OF LACK OF CANONICAL FORM CASES

Canon 1086, §1, and 1117 of the 1983 Code of Canon Law specify that all Catholics are bound to the Catholic form of marriage. There are exceptions to this general law. These exceptions are: 1) those who attempted marriage prior to January 1, 1949 and who had not been given a Catholic upbringing; and 2) those who, by a formal act, have abandoned the Catholic faith.

Catholics who attempted marriage without observing the Catholic form and non-Catholics who attempted marriage with a Catholic, (neglecting the Catholic form), who wish to enter a new marriage in the Catholic Church must first receive a Decree of Invalidity (Nullity) of this previous union.

The process for receiving such a Decree of Invalidity (Nullity) is not complex and this process can usually be expedited in a minimal amount of time. The completion of a Petition form and the submission of this form with the required documents to the Tribunal is necessary.

The following documents must accompany the Petition:

- a. A recently issued certificate of the Catholic party's baptism. This certificate should be issued within the last six months.
- b. The Marriage certificate for the Petitioner and Respondent; and
- c. The final Decree of Divorce.

The Petitioner provides copies of the above documents which will be submitted with the completed Petition form to the Tribunal.

The present address of the Respondent is not essential. When the petition form is completed, the pastoral minister/auditor should sign as a witness.

A check for \$25.00 to cover processing expenses is to be remitted when the petition and documents are forwarded to the Tribunal. The check should be made payable to "Diocese of Raleigh." Any Petitioner experiencing genuine financial hardship, is not required to submit coverage for processing expenses.

The case is processed and the final decree is mailed to the Petitioner.

2.6.3 INSTRUCTIONS FOR PRESENTATION OF PREVIOUS BOND (*LIGAMEN*) CASES

According to Church Law, the marriages of persons, who are legally capable, are presumed to be valid marriages. Thus, "Marriage possesses the favor of law" (c. 1060). A person who enters a valid marriage is bound by this bond of marriage. An attempted subsequent marriage is invalid by reason of the impediment of the previous bond (known as *ligamen*). By the natural law and by divine positive law, a previous marriage bond renders any subsequent marriage invalid (c. 1085).

The Tribunal conducts a special and simplified process for cases involving the diriment (invalidating) impediment of *ligamen*. This process is governed by cc. 1686-1688. These canons state that, in processing cases of *ligamen*, the full formalities of an invalidity process are not necessary. The Ordinary declares the marriage invalid, after the intervention of the Defender of the Bond, on the basis of authentic documents and certain witness testimony.

Three principal parties are involved in the determination of the existence of the impediment of *ligamen*. These parties are:

1. The Petitioner, the spouse in a marriage who claims that a prior marriage existed on the part of
2. The Respondent, the other spouse in the marriage who was a partner in a prior marriage to
3. The Third Party, the first wife or husband from that prior marriage.

The Tribunal has prepared a series of questionnaires to obtain the necessary information for the *ligamen* process. In these questionnaires, the party is identified by his/her title of relationship to the case (i.e., Petitioner, Respondent, or Third Party). If required documents and witnesses are available, the case is relatively uncomplicated. The process establishes that:

1. The Petitioner or Respondent, in a subsequent marriage, was previously married;
2. This Petitioner's or Respondent's first marriage meets the requirements for validity; and
3. The Third Party, to whom the Petitioner or Respondent was previously married, was alive during the entire course of the Petitioner or Respondent's subsequent marriage.

Confirmation of the existence of a *ligamen* case, is facilitated through contact with the Former spouse and the Third Party. These persons must provide factual data about:

1. The previous marriage (the first marriage for both parties);
2. Their intentions upon entering this previous marriage;
3. Their religious affiliation (to determine if either or both were bound to the Catholic form of marriage); and,
4. Verification that the Third Party was alive during the course of the subsequent marriage of the Petitioner or Respondent.

When the Former spouse and/or the Third Party cannot be reached, testimonies from other witnesses are sought. Since the four areas of inquiry listed above establish the existence of both the first marriage and the impediment, the information sought through this inquiry is essential and must be obtained.

The following documents are submitted prior to the completion of a *ligamen* case:

1. The Marriage License/Certificate for the Petitioner and the Respondent;
2. The Divorce Decree for the Petitioner and the Respondent;
3. The Marriage License/Certificate (marriage license is preferred) for the Petitioner of the Respondent and The Third Party;
4. The Divorce Decree for the Former spouse and the Third Party, (if available).

A check for \$50.00 to cover processing expenses is remitted when the petition and documents are forwarded to the Tribunal. The check is made payable to "Diocese of Raleigh." Any Petitioner experiencing genuine financial hardship, is not required to submit coverage for processing expenses.

The final decree may be mailed to the Petitioner or to his/her Pastor.

2.6.4 INSTRUCTIONS FOR PRESENTATION OF PAULINE PRIVILEGE CASES

The Pauline Privilege allows for the dissolution of a marriage between two unbaptized persons. The scriptural basis for this Privilege is found in 1 Corinthians 7:12-15. The legislation for this Privilege is contained in cc. 1143-1150 of the 1983 Code of Canon Law.

The use of the Pauline Privilege requires:

1. A marriage presumed valid and entered by two unbaptized persons;
2. The sincere conversion and valid baptism of one of the parties;
3. The moral or physical departure of the other unbaptized person; and,
4. The certitude of the non-baptism of the former spouse (Respondent).

In this Diocese, the Director of the Tribunal determines whether or not all conditions are present in a particular case for the use of the Pauline Privilege. The information he

obtains is submitted to the Judicial Vicar (the delegate of the Diocesan Bishop). The bishop and his delegate have the faculty to dispense from the interrogation of the unbaptized Respondent when circumstances justify such a dispensation. The case is not sent to the Holy See. The time required for the processing of a particular case is dependent upon the instruction of the prospective convert, the cooperation of the Respondent and the cooperation of the witnesses.

There must be certain proof that the Petitioner has been or intends to be baptized. The Baptism must be in the Catholic Church or recognized as valid by the Catholic Church. *The Pauline Privilege cannot be invoked until after Baptism has been received. The entrance of the Petitioner into a new sacramental marriage dissolves the prior bond of marriage.*

If the Petitioner has already attempted a marriage with a Catholic, the baptism of the Petitioner must be delayed until the entire process for the use of the Privilege has been completed. The Baptism of the Petitioner and the validation of the attempted marriage should take place on the same occasion. If that is not possible, the validation of the attempted marriage should take place as soon as possible following the Baptism.

On the basis of the petition, the Tribunal prepares questionnaires for the Respondent and the witnesses. These questionnaires are designed to verify the non-Baptism or Baptism of both the parties. There should be at least one witness for the Petitioner and one witness for the Respondent. These witnesses should have certain knowledge of the non-baptism of the parties. The Respondent's cooperation is necessary. However, should the Respondent not cooperate or not be locatable, his/her parents or close relatives will be questioned regarding their certain knowledge of the Respondent's non-baptism.

When certain proof of the non-baptism of both parties is received by the Tribunal, the use of the Pauline Privilege is justified. Permission to use the Pauline Privilege is sent to the Petitioner's pastor so that the arrangements for a new marriage or the validation of the existing civil union can be made.

The following documents must be submitted with a completed petition:

1. The Marriage License/Certificate for the Petitioner and the Respondent;
2. The Divorce Decree for Petitioner and Respondent;
3. A recently issued certificate of Catholic baptism of the party the Petitioner desires to marry; and,
4. A Certificate of the baptism of the Petitioner, if the Petitioner has already been baptized.

A check for \$50.00 to cover processing expenses is remitted with the petition and documents forwarded to the Tribunal. The check should be made payable to "Diocese of Raleigh." Any Petitioner experiencing genuine financial hardship, is not required to submit coverage for processing expenses.

2.6.5 INSTRUCTIONS FOR PRESENTATION OF PETRINE PRIVILEGE CASES

Since Petrine Privilege cases are processed as Formal Nullity (Invalidity) cases in this Tribunal, instructions specific to these cases will not be included in this document.

2.6.6 INSTRUCTIONS FOR PRESENTATION OF A PETITION FOR A RADICAL SANATION

If a marriage cannot be simply validated, it may be rendered valid (under certain conditions) by a special validation known as a Radical Sanation or *Sanatio in Radice* (literally, “a healing in the root”). This process presupposes that consent (naturally sufficient but juridically insufficient) was given, and that a renewal of consent cannot be obtained (cc. 1125, 1161-1166). A Radical Sanation (*Sanatio in Radice*) may be petitioned in the following situations:

1. The person petitioning for a Radical Sanation is a Catholic who wishes to be restored to sacramental life in the Church and the other party to the union is unwilling to renew consent according to the canonical form.
2. The Petitioner may also be non-Catholic invalidly married to a Catholic and, while the Catholic party may be unwilling to be reconciled to the Church, the non-Catholic Petitioner wishes to be received into full communion with the Church.
3. There may also be a case of two Catholics, invalidly married, one of whom wishes to be restored to the sacraments, while the other party is unwilling to be reconciled to the Church.
4. A situation may arise wherein both parties to the union are in good faith and both assume that they are in a valid marital union. However, the necessary dispensation from a diriment (invalidating) impediment was not obtained prior to the marriage. In this case, the Petition is presented by the Priest or Deacon without the knowledge or involvement of either party to the union. He is to contact the Tribunal for instructions.
5. A Radical Sanation may also be justified when the consent at the time of the marriage was defective because of simulation, force and fear, or any invalidating condition (e.g., a previous bond). In this case, sanation cannot take place until the defect is removed or the impediment ceases. For example, in the case of a previous bond (*ligamen*), the first marriage must be declared null through a canonical process and then the present marriage may be sanated.

The following conditions must be fulfilled before the Petition may be granted:

1. The Catholic party is aware of the invalid marriage and wishes to petition for a Radical Sanation.
2. A freedom of both parties to enter marriage is established.
3. The Catholic party signs the usual form of pre-nuptial promises, and is willing to do everything possible to live up to the serious obligation of raising children already born as Catholics.

4. The parties have not entered into a previous pact to have their children baptized and educated in a non-Catholic religion.
5. True marital consent was given by both parties at the time of the invalid marriage.
6. This consent has continued on the part of both parties to the present time, has not been, nor will be revoked.
7. When it is possible to have consent renewed (either privately or publicly) in particular case, consent can be presumed if the uncooperative party intends to stay married and persevere in conjugal life.
8. It is established that the marriage is stable and that there appears to be little or no likelihood of a separation or divorce;
9. It is morally certain that scandal will not result from the Radical Sanation.

In addition to the completed Petition for a Radical Sanation, the following documents are submitted:

1. The entire Marriage File (Pre-Nuptial Investigation) which includes a recently issued Certificate of Baptism of the Catholic party;
2. A recently issued Certificate of Baptism of the present spouse, if a Catholic;
3. A Marriage Certificate, civil or religious, of the marriage to be sanated;
4. The usual form of Marriage Dispensation application signed by the Petitioner;
5. A letter of recommendation from the Pastoral Minister sponsoring the Petition.

When the Radical Sanation has been granted, the marriage must be recorded in the Parish Marriage Register in the usual form for entering marriages. The Marriage File will then remain in the archives of the Chancery. When a Radical Sanation is required, a Petition form should be requested from the Tribunal. There is no fee for a *Sanatio in Radice*.

2.6.7 FORMAL CASES

The Catholic Church teaches that marriage was elevated to the dignity of a Sacrament by Jesus Christ (c. 1055, §1). By doing so, Jesus enhanced the dignity of an institution already held in God's creation. Marriage is an enduring and exclusive partnership in which both spouses strive to establish a loving and life-giving interpersonal relationship. If both parties are baptized, the natural bond of marriage is a Sacrament.

For this reason the Catholic Church views civil divorce as a last resort necessary for the protection of the rights under civil law. The Catholic Church does not accept that divorce can dissolve the bond of a valid marriage. Church law, in fact, presumes that a marriage is valid until the contrary is proven (c. 1060).

Every marital consent, however, does not meet the standards established by Church law. These standards required the presence of certain essential intentions and/or capabilities on the part of both parties for the valid exchange of marital consent. Since the exchange of marital consent is a juridic act, the absence of these essential intentions and/or capabilities renders marital consent invalid (as a juridic set). The exchange of marital consent which is not a valid juridic act does not bind until the death of either party.

The purpose of the nullity process is to determine whether or not the exchange of marital consent contained the elements essential to a valid juridic act. In order to render an affirmative response to a petition for a declaration of nullity (invalidity), it must be proven beyond any reasonable doubt that the exchange of marital consent did not result in the existence of a valid juridic act. This proof of nullity (invalidity) is grounded in laws contained in the *Code of Canon Law*. The promulgation of the *Code of Canon Law* by Pope John Paul II was, in effect, a public recognition that the proper application of these laws can result in a valid decision for nullity (invalidity). Since marriage is brought into existence by the consent of the parties (c. 1057, §1), the focus for the adjudication process is the time at which consent is exchanged. If the acts of a marriage case do not contain evidence sufficient to warrant a declaration of nullity (invalidity), an affirmative decision cannot be rendered.

A declaration of nullity (invalidity) by a Church court does not have any civil effect in the United States. A declaration of nullity (invalidity) concludes that at least one of the elements essential for the valid juridic act of marital consent, as determined by Church law, was not present at the moment marital consent was exchanged. It does not therefore; affect rights in regard to such matters as property, inheritance, visitation of children, etc. A declaration of nullity (invalidity) has no effect on the legitimacy or rights of any children born of the union (c. 1137). A declaration of nullity (invalidity) does not cast doubt on the good faith of the parties, it does not intend to blame either party, and it does not intend to instill guilt in either party.

2.6.8 THE PETITIONER

1. The Petitioner (the person seeking a declaration of nullity/invalidity) is to contact the Tribunal to initiate the process. For the case to be accepted, the Petitioner must demonstrate that there was, from the beginning of the marriage, some basis for an allegation of invalidity. It is this basis which will warrant an investigation of the marriage.
2. The Petitioner is informed that certain documents must be obtained. These documents are:
 - a) A recently-issued Certificate of Baptism if one or both of the parties are Catholic;
 - b) A Marriage License/Certificate (Marriage License if preferred);
 - c) A civil Divorce Decree.
3. The Petitioner will be assigned an Auditor who will conduct an initial interview.
4. The Petitioner will be required to complete a narrative, and to submit the names and addresses of witnesses to the Tribunal. When the required documents, the narrative, and the witness list are all received by the Tribunal, the formal process is initiated. It is at this point that the Petitioner will be given the opportunity to choose an Advocate who has been trained by Tribunal personnel. The chosen Advocate can represent the Petitioner and can guide him/her through the remaining stages of the process.

2.6.9 THE RESPONDENT

The Tribunal contacts the former spouse (called the Respondent) who, by Church law, has a right to be heard. The Respondent is given the opportunity to provide information regarding the alleged ground of nullity (invalidity). The Respondent has a right to be represented by an Advocate in the proceeding and is given an opportunity to appoint an Advocate trained by the Tribunal staff. The significance for adjudication of the Respondent's cooperation varies from case to case. In some cases, the Respondent's non-involvement may result in a difficult adjudication process; in other cases, it may be possible to proceed with certitude in the absence of his/her intervention. The Respondent is given a legislated period of time to respond. An additional period can be requested if the one initially established is inconvenient. A Respondent is not permitted, however, to delay the case indefinitely. The Respondent's participation in the process, while highly desirable, is not always essential. In the event of his/her non-cooperation, an accepted case still proceeds.

2.6.10 WITNESSES

It is the Petitioner's responsibility to ensure that witnesses cooperate. The Petitioner is expected to inform the witnesses of the situation and to request their prompt cooperation with Tribunal personnel. Each witness is sent a cover letter explaining how to proceed and a questionnaire. Witnesses are encouraged to be as complete as possible in their answers. Witness testimony is to be given under oath and witnesses are to sign the completed questionnaire either before a Pastoral Minister or in the presence of a Notary Public.

Each witness is offered the option of invoking confidentiality. This option is explained at the end of the questionnaire.

2.6.11 PROCESSING TIME

The length of time involved for the completion of a case at First Instance varies from case to case and it is dependent upon many factors. Many of these factors are beyond the control of the Tribunal. In this Tribunal, the average time to complete a case is twelve to fourteen months from the time the Petitioner's narrative is received. Because the response times of the parties to the case and the witnesses cannot be predicted, the Petitioner cannot be assured that his/her case will be adjudicated within the specified time period.

In a specific case, observations recorded in the Acts may justify the imposition of a restriction on the Petitioner and/or the Respondent. A restriction must not be interpreted as a penalty. A restriction communicates, in effect, the concerns of the Court of Appeal regarding the subject's capacity (in the absence of the resolution of the problems which resulted in marriage failure) to enter a successful marriage in the immediate future. Restrictions are imposed to safeguard the dignity of the Sacrament, to insure capacity to

marry, to protect the involved party from the trauma of another divorce, and to protect an innocent third party.

Although a restriction cannot, in itself, cause the exchange of marital consent to be invalid, a party (on whom a restriction has been imposed) should not make arrangements for a possible future marriage or convalidation until the restriction has been removed. It is the policy of the Diocese of Raleigh that a wedding date not be set until the entire nullity process and removal of a restriction (if imposed) is complete. If, however, a date has been set, a commitment cannot be made by the Tribunal to complete a case by a specific date. The removal of a restriction by the ordinary or the tribunal of the place where the proposed marriage is to be celebrated is an indication that appropriate intervention has occurred.

The law of the Church requires that every decision of a local Tribunal affirming the nullity (invalidity) of a marriage must be reviewed by the Court of Second Instance. This requires additional time which may or may not be substantial. When the Petitioner receives a copy of this final decree from the Court of Second Instance and when notification of the removal of a restriction (if imposed) has been received, the Petitioner is then free to make arrangements for entrance into a new marriage. Respondents are always notified that their case has been completed.

2.6.12 COSTS

The Tribunal is subsidized by the Diocese of Raleigh for approximately two-thirds of the cost of processing a case. At present, the Petitioner is asked to make a contribution of \$450 to the Tribunal to help defray a portion of the costs incurred in the processing of his/her case. This amount may be contributed either at one time or in installments according to the *Suggested Schedule of Contributions*. Any Petitioner experiencing genuine financial hardship is not required to submit coverage for processing expenses.

2.7 FUNERALS

Deceased persons may be cremated as long as their choice of cremation does not come from any intention to deny the immortality of the soul or any other tenet of faith (cf. Canon 1176, paragraph 3).

All Catholics and Catechumens have the right to choose the parish at which they will have the Order of Christian Funerals celebrated (cf. Canon 1177).

Canon 1183, paragraph 3 provides for the granting of ecclesiastical funeral rites to baptized members of a non-Catholic church or ecclesial community unless it is contrary to their will and provided their own minister is unavailable.

2.8 SACRAMENTAL WINE

Canon 924, Paragraph 3, requires, “The wine must be natural wine of the grape and not corrupt.” From time to time the Holy See has issued clarification about the suitable matter for the Holy Eucharist, and has asked the Diocesan Bishop to make a determination. In general, wine for the Eucharist is to be made from the pure fermented juice of sound, ripe grapes. Other fruits cannot be used, and additives such as cane or beet sugar are not permitted. Dilution, adulteration or spoilage are also to be avoided.

In the Diocese of Raleigh, wines approved for use by reason of their being assured of meeting these requirements are, a) wines labeled “for sacramental purposes” and b) wines which are specifically designated by name and published in a list of the diocese. Wines suitable for sacramental use per b., above, are contained in letters sent to Priests and Pastoral Administrators from time to time. Copies of the most recent letter are available from the Chancery.

2.9 PRIESTS

- 2.9.1 Within two months after ordination, every diocesan priest shall make his Last Will and Testament valid in civil law. Either the original or a copy of it together with burial instructions are to be filed in a sealed envelope in the Chancery. It is desirable that one priest be named executor of a priest’s will. Provision should be made for the discharge of Mass intentions accepted but not fulfilled.
- 2.9.2 All priests are encouraged to participate in one of the Priest Support Groups active in the Diocese. For information, contact the Division of Human Resources.
- 2.9.3 A pastor with an associate should consider the rectory to be the common in which all resident priests are equally considered and cared for. Priests, unless they have permission of the Bishop, should not have relatives as habitual residents of the parish house. The usual furnishing of the rectory should be provided by and owned by the parish.
- 2.9.4 Priests of the Diocese are entitled to an annual vacation of four weeks which includes three Sundays. (Refer to section 1.5; cf. Canon 533, paragraph 2.)
- 2.9.5 Deans are encouraged to plan meetings of the clergy every other month. These meetings should include elements of a spiritual, pastoral, and social nature. All priests resident in the deanery are asked to make a special effort to attend and participate (cf. Canon 555, paragraph 2).
- 2.9.6 When a priest leaves his parish for an extended period of time, he should inform the Chancery so that he can be reached in an emergency. If the period of time away is brief, the Dean may be notified (cf. Canon 533, paragraph 2).
- 2.9.7 The Priestly Life and Ministry Committee of the Priests’ Council plans the following days of study and renewal for the clergy: Annual Retreat, overnight study days, and Day of Recollection on Tuesday of Holy Week. Priests should make every effort to attend all these events. The Bishop’s permission is required not to make the annual retreat.
- 2.9.8 Priests of the Diocese are encouraged to apply for a sabbatical leave according to the guidelines of the Priestly Life and Ministry Committee.

2.9.8.1 CONTINUING FORMATION OF PRIESTS

SECTION I – GUIDELINES

A. RATIONALE

Priests are ordained to serve the people of God. It follows from this that priests have the right as well as a challenge to take advantage of the opportunities which will help them to grow in their ability to fulfill this mission. The document of the American Bishops entitled “The Program of Continuing Education of Priests” states:

“Every priest has a right and an obligation to continue his spiritual growth and education. He has a right to strong support from his superiors, peers, and the people he serves. He also has an obligation to his superiors and peers, but above all to his people to grow in grace and knowledge.” (3)

The American Bishops see this right and obligation to continuing formation in terms of conversion:

“Any discussion of continuing formation and education of priests needs to be grounded in an understanding of conversion as an ongoing process both personal and communal. Though conversion takes place in the inner life of each person, it is never a private affair and conversion occurs in every facet of one’s life – intellectual, affective, social, spiritual, moral and ecclesial. (The Continuing Formation of Priests, chapter I n.1.p.5)”

“Of these areas of a person’s life, spirituality is at the center of growth for priests. At a time when the self-understanding of Church and understanding of ministry is essential, priests, like other professionals, must engage in lifelong learning if their services are to be effective, if they are to grow in faith, and if they are to proclaim that faith clearly and convincingly to a rapidly changing world. In this endeavor, it is the individual who is primarily responsible for taking the initiative in continuing his personal and professional education, which the changing needs of the Church and the world demand of him.” (The Program of Continuing Education of Priests. #16)

In addition to the priest’s need for personal development, the faithful have a right to the best service the priest can offer.

“Priestly ministry is a most effective witness to the Gospel when it addresses realistically the situation in which the faithful find themselves. Priests cannot be of service to others if they remain strangers to the life and conditions of others.” (Vatican II, Decree on the Ministry and Life of Priests, #2). In today’s pluralistic and diverse world, it is all the more imperative that priests engage in personal and group study of newly generated knowledge and pastoral skills which will improve their ministry. Continuing formation is a lifelong endeavor.

B. DEFINITION

The American Bishops define the term continuing formation as “any learning after ordination, including growth both internal (spiritual, social, psychological) and external (cultural changes, theological disciplines and pastoral skills).” (The Continuing Formation of Priests, p.4)

C. PURPOSE

The Committee directs its comments primarily to strengthen and encourage diocesan-sponsored programs of continuing formation. It does, however, recognize that all the needs for the continuing formation of priests cannot be met by such programs. Arrangements for other programs are to be mutually explored and decided by the individual and his proper diocesan agency which considers special requests.

Unless an exception is explicitly made within these recommendations, the Committee looks upon “continuing formation of priests” as inclusive of all priests, diocesan and religious. This inclusion assures that all priests of the diocese may be mindful of their responsibility to continue their total education and growth, and that greater unity and mutual support among priests of the local church may be realized.

D. MINISTERIAL GROWTH

The spiritual development of priests is part of their continuing formation since its aim is the total development of the person in ministry. The committee recognizes that the spiritual development of priests is a daily process and a result of many efforts and graces; but here the guidelines are dealing with instruments of one’s spiritual growth: retreats, prayer days, fraternities or support groups and spiritual direction.

1. Spiritual Direction

Because priests are spiritual leaders in their communities, it is important that they become competent in giving spiritual guidance and are urged to have a spiritual director themselves for their own spiritual growth. Discernment in prayer and decision making are important skills for pastoral ministry.

2. Retreats

The gospel attests to the fact that Jesus and His apostles took time for themselves, time to be in communion with the Father and with each other. So does our tradition attest to the need for a time set apart for spiritual growth, both as an individual and as a minister of the diocesan church. For these reasons the policies regarding retreats are as follows:

- The priests ministering in the Diocese of Raleigh shall attend the yearly retreat scheduled by the diocese.
- In the course of a given year priests ministering in the diocese are urged to experience another form of a retreat. The cost is not to exceed the cost of the annual retreat.
- Those in charge of continuing formation are responsible for the annual retreat and are charged with searching for and recommending retreat masters to be approved and invited by the Bishop.
- Religious priests in diocesan ministry are strongly encouraged to make diocesan retreats in order to foster unity and cooperation.
- The institution of assignment will finance the retreats mentioned in 2a & 2b above. If the institution of assignment is unable to finance these retreats the Diocese of Raleigh will cover the cost of them through the budget of the PLM Committee.

3. Prayer Days

- Day of Prayer: The Priestly Life and Ministry Committee will provide a day of prayer for the priests in conjunction with the Mass of the Chrism. All priests are expected to participate in the entire day.
- All priests are encouraged throughout the year to make “days of prayer”. We recognize that these days may be made in a group or privately. These days should be arranged by the dean with the cooperation of the Priestly Life and Ministry Committee according to the needs of the local priests.

4. Priests’ Fraternities and Support Groups

- Priests have a need for fraternities and support groups. The committee recognizes this need and would encourage membership in these groups.

E. ACADEMIC AND PROFESSIONAL GROWTH

1. Educational Activities

Priests should be continually encouraged to take advantage of the opportunities to continue their ministerial formation through independent study, reading programs, tape libraries, seminars, diocesan study days, workshops, and formal courses.

The Diocese of Raleigh has the responsibility to support and encourage this kind of growth. Toward this end, each person is provided with the following annual minimum opportunities:

The priests ministering in the diocese are encouraged to participate annually in ministerial formation opportunities such as workshops, seminars and diocesan study days. Diocesan sponsored programs should be given priority. This is an addition to vacation and diocesan programs where attendance is mandated.

The professional growth of each priest is owed to the people he serves and to the priest himself. The parish or institution of assignment which the priest serves is to provide funds annually for his continuing education in addition to the allotted retreat stipend and overnight study days costs. (See #2.e above under “Ministerial Growth.”)

- a. Each priest ministering in the diocese is required to participate each year in some form of continuing education, in addition to the retreats and study days. The goal of this policy is that each priest be involved in a minimum of formal education programs. A \$100 continuing education stipend may be taken from the parish or institution of assignment funds for continuing education over and above the costs of the required retreats and study days.
- b. Each year priests will be required to indicate on their personnel preference questionnaire the way they have fulfilled these requirements.
- c. The continuing education stipend can also be used for part-time professional development such as courses or programs at local colleges and universities or other centers and universities or other centers of culture, intellectual or professional growth.

Any entity (i.e., parishes, ministries, diocesan divisions or departments) employing a priest should establish, as a budgetary line item, funds for the continuing formation of said priest(s). The Diocese of Raleigh should establish a numbered line item for the continuing formation of the priests (as distinct from a personnel development code number).

Since all priests have a right and responsibility for continuing personal and professional development, parishes and other agencies are required to budget funds to provide for the fulfillment of these guidelines. If a parish does not foresee sufficient parish funds to fulfill these guidelines, the pastor should request a diocesan grant for this purpose, at the time when parish grants are considered each year.

More continuing education, e.g., extended study periods, is sometimes desirable and should be negotiated in each situation. Enrollment as part-time students in local universities or other local education facilities is another aspect of continuing educations.

Special programs should be developed for special times: e.g., and internship for the newly ordained, an orientation program for new pastors, and pre-retirement and retirement sessions for those entering this phase of ministry.

Priests are urged to use the resources of the Diocesan Media Center for educational and formation purposes.

2. Sabbaticals

Because of their longer duration, sabbaticals and “Certified, Degreed and Documented Studies” warrant special guidelines. Please see Sections 2 & 3 below.

- a. Sabbaticals range in length from three (3) months to one (1) year. They are times for personal and professional study and prayer. They should, however, be associated with institutions or programs aimed at providing this service. Sabbatical requests should be submitted to the coordinator. He, along with the committee, makes recommendations to the Vicar of Clergy.

In making his request, the applicant should state in writing at least twelve months in advance the purpose of the particular sabbatical requested, its relationship to his personal and spiritual growth, its value to his ministry, its cost and location, and its length. Ideally a sabbatical leave occurs after every seven years of uninterrupted service to the diocese; but one can apply at any time.

Financing of the sabbatical leave will be shared by the diocese and the applicant. Each applicant should collaborate with the Bishop and proper board to provide his replacement while on sabbatical.

F. ACCOUNTABILITY

The American Bishops made these remarks concerning accountability in continuing formation:

“At times the competent authority (the Ordinary) will require the participation of every priest at a specific program or event. This may be necessary because certain issues need the attention of the entire presbyterate. If at times priests are not mandated to attend all conference, it is important that diocese and religious communities establish minimal requirements for all priests.” (The Continuing Formation of Priests, pp. 19-20).

1. Record and Assignments

The Coordinator of Programs of Continuing Education of Priests will maintain a record of the continuing formation pursued by each priest and will provide this information upon request from the Personnel Committee at the conclusion of the participants program. Each priest is responsible for notifying in writing the Coordinator of Continuing Education of Priests.

SECTION II

A. SABBATICAL POLICY

This policy only applies to those experiences indicated in the document entitled “Guidelines”, section 1, number 2 “Sabbaticals”.

The American bishops in their statement on Continuing Education of the clergy understand sabbaticals in the following manner:

“Sabbaticals offer priests the opportunity to be renewed through a rest, a change of pace and freedom from the stress of ministry and other concerns. When a priest acquires additional theological understanding, pastoral skills and personal growth during a sabbatical, there are obvious benefits for the people he serves.

Periodic sabbaticals are of such importance to the personal development and growth of all priests that diocesan bishops must educate and interpret to the Faithful the need on their part to forego at times some priestly service.

Sabbaticals should concentrate primarily on theological, pastoral or ministerial areas of concern. However, since human growth in every facet of life contributes to the quality of ministry, a priest might use some sabbatical time for studying or other disciplines, e.g., the arts, music, languages, etc.

When a diocese or religious community establishes a sabbatical policy that includes every priest, it recognizes the importance of periodic renewal and encourages the priest to consider taking time away from his regular ministry. Established sabbatical policies include guidelines for appropriate selection of programs, financial support and a review process to assess the sabbatical’s effectiveness.” (The Continuing Formation of Priests, Nov. 1984. pp. 20-21)

The Diocese of Raleigh recognizes the importance of renewal for its presbyterate and therefore encourages its priests to take periodic sabbaticals according to this policy. The guidelines for sabbatical leave are as follows:

Eligibility: Every priest ministering in the diocese having completed seven years of continuous service in the diocese is eligible. This includes members of Religious Orders who have completed seven years of continuous service in the Raleigh Diocese. Priority will initially be given to those priests who have been ordained the longest. The date of application will also be taken into account. After completion of an initial sabbatical, a priest is encouraged to apply for another at least every seven years. Normally, the length of a sabbatical will be a minimum of three (3) months and maximum of one (1) year.

Applying: The priest applies to the Coordinator of Programs of Continuing Education of Priests at least one (1) year in advance of the proposed sabbatical stating its scope, purpose, relationship to this personal growth, its value to his ministry, its approximate cost, etc. The coordinator will convey this to the Vicar for Clergy in an expeditious manner.

Financing: All Diocesan obligations regarding finances for approved sabbaticals will be handled through the Coordinator of Continuing Education for Priests.

The Diocese shall be responsible for the priest's insurance, retirement contribution and automobile insurance/tax/tag/depreciation costs during the period of the sabbatical.

With the exception of automobile insurance/tax/tag/depreciation mentioned above, the priest shall be responsible for any personal transportation costs during the period of the sabbatical.

Coverage: The presbyter applicant will be in consultation with the Personnel Committee following approval of the sabbatical leave to discuss appropriate coverage during his absence from his parish or institution. The diocese shall provide through the Personnel Committee coverage during the time of the sabbatical.

APPLICATION AND DESCRIPTION
SABBATICAL PROGRAM
DIOCESE OF RALEIGH

Please Type application

Name _____ Age _____

Address _____ Ordination Date _____

Years in service in the Diocese of Raleigh _____

Telephone _____

Description of Sabbaticals:

Please see the document entitled "Guidelines for Continuing Formation of Priests: Section 2". Sabbaticals should concentrate primarily on theological, pastoral, or ministerial areas of concern. Since human growth in every fact of life contributes to the quality of ministry, a priest might use some sabbatical time for studying in other disciplines, e.g., music, the arts, languages, etc.

Title or Description of Program

Dates of Sabbatical Leave

From: _____ To: _____

Place: 1. _____ 2. _____

Cost: Room and Board _____ Travel _____ Tuition _____

Total Cost _____

PERSONNEL COVERAGE

Do you have any recommendations for coverage during your sabbatical?

Name _____

Address _____

Have you been in contact with him? _____ Yes _____ No

Have you prepared a description of your ministry for the one who is to cover for you?

_____ Yes _____ No If yes, please attach.

Please attach a written statement suggesting why this sabbatical will be good for you.

Signature _____ Date _____

Send completed form to:

SECTION III – ORGANIZATIONAL STRUCTURE CONTINUING FORMATION OF PRIESTS

A. STRUCTURE & POLICY

The Priestly Life and Ministry Committee of the Priests Council is charged with the responsibility of formulating the policies indicated in the documents on the Continuing Formation of Priests.

The PLM Committee is specifically responsible for overseeing all aspects stipulated in Section 1, “Guidelines,” of these documents.

The Coordinator of Continuing Education of Priests is responsible for overseeing all aspects stipulated in Section 2, “Sabbaticals,” and Section 3, “Certified, Degreed, & Documented Studies.”

The Chair of the Priestly Life and Ministry Committee is always selected from the Priests’ Council. The Coordinator of Programs of Continuing Education for Priests, is appointed by the Bishop for a 3 year term on the recommendation of the Presbyteral Council.

B. ROLE OF THE COORDINATOR OF PROGRAMS FOR THE CONTINUING EDUCATION FOR PRIESTS

To gather as much information as possible on what continuing education possibilities exist.

To gather written comments from clergy who have attended various workshops, institutes, and programs so that others who may be thinking about attending the same or similar ones could have some “local” input about the quality of the program they are considering.

To serve as a “clearing house” for Continuing Education possibilities for our clergy.

To work with the Vicar for Clergy to discern appropriate Continuing Education possibilities for individual members of our presbyterate and to make suggestions to the Vicar and, if the Vicar thinks it appropriate, to the individual priest regarding those possibilities.

To seek out any grant opportunities which might be available for Continuing Education of Clergy.

To be a “sounding board” and/or “clearing house” for priests who wish to discuss possibilities about further graduate study; to facilitate research on such possibilities; to

make recommendations to the appropriate officials and/or bodies regarding such needs and wishes.

To serve as an advocate for funding continuing formation and education opportunities, in accord with the guidelines established by the Priests Council. The budget should be administered by the coordinator. This budget should include separate line items for Sabbaticals and for Certified, Degreed, and Documented studies.

To be available to serve as a liaison to organizations and/or individuals in other dioceses who function in this “Continuing Formation for Clergy” ministry.

The Coordinator should attend annual regional and national meetings of NOCERCC.

APPLICATION FOR FUNDS FOR CONTINUING FORMATION

NAME _____

PARISH _____

DESCRIPTION OF STUDY

TITLE _____

DATES _____

PLACE _____

COST: Registration _____
 Room & Board _____
 Transportation _____

PERSONNEL COVERAGE

Will your assignment be covered while you are gone? _____ Yes _____ No

EVALUATION REPORT

How do you expect this study to aid your ministry?

Upon the completion of study, you are to give a brief report, in writing, including a summary of the content of the study, a critique of its value for you and a recommendation for others interested in this topic. This report is to be sent to the Coordinator of Continuing Education for Priests.

Please forward the completed copy of this application to:

C. CERTIFIED, DEGREED AND DOCUMENTED STUDIES

“The priest’s responsibility towards continuing education is strong and deep. He has the right and responsibility to secure, encourage and participate in continuing education programs which enhance personal development and contribute to the pastoral understanding and skill. Respecting one’s right to continuing education in the broadest sense is to understand the dignity of one’s person – all of which is primary in personal growth.” (As One Who Serves, 1977, pg. 60)

Given the larger church’s policy the Bishop has accepted the Priests’ Council policy which states that there must be one priest away every year in studies relative to the needs of the diocese. Therefore, in order to facilitate this objective the following guidelines shall be implemented:

1. Upon the recommendation of the Coordinator of Continuing Education of Priests, The Vicar of Clergy shall work in conjunction with the Personnel Committee in recommending to the Bishop who shall be the candidate for studies.
2. The funds to underwrite this person’s education will be a standing line item in the diocesan budget, administered by the Coordinator.
3. Longer term aspect of sabbaticals for individual reasons: A priest can make the offer to obtain a degree on his own aside from the needs of the diocese. The diocese is under obligation to facilitate this through the Priestly Life and Ministry Committee.

2.9.9 All diocesan priests are covered by the provisions of the clergy retirement plan. For a serious reason, a priest may retire at age 65 with the permission of the Bishop. At age 70, a priest may retire or relinquish the pastorate of a large parish. A priest must retire from active duty at age 75. A priest should not continue to live in the rectory of the parish from which he retires (cf. Canon 538, paragraph 3).

2.9.10 No priest shall institute civil or criminal proceedings against any lay person, commercial firm or organization, cleric, or church institution without first obtaining permission from the Bishop.

2.9.11 FACULTIES

By ordination, all priests and deacons who enjoy faculties of their own diocese or religious community may exercise them everywhere in the world unless they have been restricted by the local bishop (Canon 967, paragraph 2).

The specific faculties of the Diocese of Raleigh are given to every priest at his ordination, incardination, or at the beginning of his term of service in the Diocese. They are granted by the Bishop and may be obtained through the Chancery.

Faculties of the Diocese of Raleigh may be received from: the Bishop, Vicar General, Deans, Chancellor, and Episcopal Vicars (in accord with Canons 131, 132).

The Bishop grants the faculty to absolve the individual from the censure attached to the crime of abortion to all priests who have confessional faculties in the Diocese (cf. Canons 1047, paragraph 4, 1398). This is done so that priests, in their role as confessor, can more expeditiously offer the loving mercy and forgiveness of God to such penitents.

2.9.12 MASS OFFERINGS (effective September 13, 2005)

The minimum amount for weekend Mass compensation is \$50.00 per Mass, plus travel expenses and stipend. The minimum amount for daily Mass compensation is \$25.00 per Mass, plus travel expenses and stipend. When a substitute priest offers Pro Populo Mass, the pastor will provide the stipend from his personal funds.

Marriage, baptism, and funeral stole fees are to be given to the parish.

Mass stipends belong to the priest. If a priest does not have stipends from the parish, he may write to the Director of the Society for the Propagation of the Faith.

2.9.13 Pastors or whoever has the pastoral care of a parish are obliged to offer the Pro Populo mass on all Sundays and Holy Days of Obligation (cf. Canon 534). Priests can accept an offering (stipend) for a Mass (cf. Canon 945, paragraph 1). An offering may not be accepted for the Pro Populo Mass; however, the priest is allowed to take an offering for the second Mass he celebrates that day (cf. Canon 951, paragraph 1). He cannot retain the offering for personal use. In general, an offering may be accepted for a second or third Mass, but the priest cannot personally retain more than one offering except on Christmas (cf. Canon 951, paragraph 1). He is to see that the offerings are used to help the poor or for some other charitable work.

2.9.14 REMUNERATION OF PRIESTS IN THE DIOCESE OF RALEIGH

Effective July 1, 2008

The following table was recommended by the Priests' Council and approved by Bishop Gossman.

	<u>Monthly</u>	<u>Annually</u>
Salary	\$2,523.84	\$30,286.08

A Priest receives the following:

1. Residence:

- A furnished residence (rectories are to be left fully furnished at the end of a pastorate);
- Food (up to an average of \$30.00 per day);
- Housekeeping and cleaning products;

- Laundry and dry cleaning;
- One (1) telephone line in the residence, (local phone service and business long-distance calls are covered);
- Non-Premium cable/satellite TV programming;
- Local newspaper delivery;
- Utilities;
- Repairs to the Rectory

2. Retreats

- Annual Priests' Retreat;
- In addition to the above, a private retreat (transportation included) may be made at parish expense, not to exceed the total expense of the annual Priests' Retreat.

3. Continuing Education:

- Study Days sponsored by the Priestly Life and Ministry Committee or the Diocese; Provincial Assembly of Priests;
- Study, workshops, and conferences (not to exceed \$1,500);
- Ministerial aids/journals (not to exceed \$300)

4. Business/Ministerial Expenses:

- Business entertainment (whether in or out of rectory);
- Adequate computer, ISP Account and internet connection;
- Cell phone;
- Calendar/PDA (e.g. "Palm Pilot").

5. Other:

- Health Insurance (including dental). First Dollar Coverage provided through the Diocese for only those items covered by the medical/dental plan; in addition, an annual physical examination; and annual hearing test and purchase of a hearing aid; an annual eye examination and the payment for one pair eyeglasses/contact lenses (not to exceed \$350 per calendar year).
- Moving expenses are paid by the assignment *to which* the priest is transferred.

A Priest receives a salary to pay for personal items, including the following:

1. All alcoholic beverages (except for business entertainment);
2. Personal long-distance telephone calls;
3. Private telephone lines;
4. Food during vacations;
5. Premium cable/satellite TV programming;
6. Personal toiletries;

7. All personal income taxes (Federal, Self-Employment, State, Property and Personal).

B. Automobile

1. The parish pays for the following, related to the business operation of the car:

- Reimbursement of all business miles at the current IRS rate. (\$.585/mile). Business miles included but are not limited to: miles driven to hospitals, miles driven to other parishes or the Catholic Center for meetings, miles driven to other parish, if assigned to more than one location. Miles driven to and from the doctor, to and from the rectory and to and from the grocery store are not considered business miles.

2. A priest is responsible for the following:

- Tickets incurred due to motor vehicle infractions
- All insurance premiums for his personal car
- Car payments, if applicable
- Oil changes
- Repairs and maintenance (tires, etc.)
- Gas

2.9.15 DATE AND FREQUENCY OF PAY FOR PRIESTS

- A. Every priest working in the Diocese of Raleigh is to be paid on the first of the month. This payment is for his services during the balance of that entire month. If the first day of the month is a Saturday or Sunday, the payment should be made on the following Monday.
- B. Newly ordained diocesan priests who are ordained during a month and assigned to a parish are paid on the first day of their ordination on a pro rata basis for the balance of the month. In subsequent months, they are to be paid as in item (A) above. Newly arrived priests from a religious order are paid in the same manner.

2.10 SALARIES AND BENEFITS SCALE FOR RELIGIOUS BROTHERS AND SISTERS IN THE DIOCESE

Effective July 1, 2008

Stipend	\$1,980 per month for each month of actual work
Retirement	\$1,997 annual contribution to retirement fund of the community provided by the parish/institution
Car	Car or \$388/month provided by parish/institution
Car expenses	Provided by parish/institution
Hospitalization	Insurance provided by parish/institution
Housing & Utilities	Provided by parish/institution

Study Days	All in diocese, one outside diocese provided by Parish/institution
------------	--

Round trip to Motherhouse/Provincialate	One per year provide by parish/institution
---	--

Each Religious Brother or Sister receives from the parish or institution an additional \$1,980 the equivalent of one month's stipend, for an entitled week of retreat and three weeks of vacation/home visit.

2.10.1 SALARIES AND BENEFITS PASTORAL ADMINISTRATORS (RELIGIOUS)

Effective July 1, 2008

Salary	\$1,980 per month for each month of actual work
Retirement	\$1,997 annual contributions to retirement fund of the Community provided by the parish/institution
Car	Car or \$388/month provided by parish/institution
Hospitalization	Insurance provided by parish/institution
Housing & Utilities	Provided by parish/institution
Annual Retreat	A one week private retreat may be made at parish expense
Study Days	All in diocese, one outside diocese. Provided by Parish/institution
Paid Vacation	Three weeks per year
Round trip to Motherhouse/Provincialate	One per year provided by parish/institution

2.11 PARISH RECORDS

It is the responsibility of the pastor to keep carefully the parish records. These include:

SACRAMENTAL REGISTERS:

- Baptismal Register
- Confirmation Register
- Register of Catechumens
- Reception in full Communion

Book of Elect
Canonical status noted in Baptismal Register
Marriage Register
Death Register
Visitation of Sick

MARRIAGE CASES

In addition to the Marriage Register, the parish or mission should keep files of all memoranda, notes, letters or data sheets gathered on the occasion of preparation for marriage and preparing a marriage case for the Tribunal.

Regarding annulment cases, complete files should be kept of all relevant correspondence, transcripts of testimony, affidavits, sacramental and legal documents, notes, expert evaluations, etc.

FINANCIAL RECORDS of detailed financial transactions should be kept for seven years. Annual parish financial reports should be kept indefinitely, as should information on wills, bequests, and restricted gifts.

PROPERTY RECORDS are permanent records and should never be destroyed and should be retained indefinitely.

PERSONNEL RECORDS

Job Descriptions
Contracts and Agreements
Personal files, i.e., applications, certificates, resumes, correspondence, evaluations, status change.

ADMINISTRATIVE RECORDS

Weekly bulletins, special newsletter, etc.
Census Records
Parish Council constitution, bylaws, minutes, reports
Parish correspondence
Finance Council charter, minutes, membership
Historical notes, e.g. news clippings, photographs, historical notes, and sketches, scrapbooks, programs.
Documentation concerning parish organizations

Every parish and mission is required to maintain and preserve an appropriate archive for the following documents:

Sacramental records
Financial records

Property records
Personnel records

OTHER DOCUMENTS:

- A. Canonical erection of the parish/mission
- B. Formal letters from the Diocesan bishop and his staff
- C. Annual parish profile (as sent to the Official Catholic Directory)
- D. All legal documents

Each parish is to possess its own seal. (Canon 535, paragraph 3)

Any sacramental record, property deed or other document of historical value which is over 100 years old is to be sent to the Diocesan Archives for proper preservation and safekeeping.

2.12 REPORTS

The following reports are required to be submitted to the Chancery:

Parishes not on the Diocesan Accounting System should send in their internally generated reports to the Diocesan Business office for the quarters ended September, December and March. All parishes must complete a Diocesan Year End Financial Report by July 31.

Reports are also due when the pastor is transferred.

Status Animarum	July 31
Parish Plans	July 1
Parish Budget	July 1

2.13 NEWSPAPER – THE NORTH CAROLINA CATHOLIC

The official newspaper of the Diocese of Raleigh is The North Carolina Catholic, whereby official announcements are made and laws are promulgated. All parishes shall have full parish coverage. Changes should be reported monthly of parish registrations.

2.14 CHARTER OF DIOCESE OF RALEIGH BUILDING AND REAL ESTATE COMMISSION

1. MISSION

The mission of the Building and Real Estate Commission of the Diocese of Raleigh is to assure responsible management of all Diocesan properties, make recommendations for the purchase and sale of properties, and to assist and guide the Diocese and parishes in the construction of new facilities as well as the renovation of

existing facilities. The Commission is also responsible for the management of the Land Trust.

2. ROLE RELATIONSHIPS

- a. To advise the Bishop of the Diocese on matters related to buildings and properties as well as other such matters which may be referred to the Commission.
- b. To serve as consultants to the Chancellor in his role as Chief Administrator of the Diocese.
- c. To interact closely with the Finance Council and other Diocesan Collegial bodies in matters of buildings and real estate.

3. ROLE FUNCTIONS

- a. To establish procedures and guidelines relative to buildings and real estate which are to be published in the Planning and Construction Manual of the Diocese.
- b. To assist the diocese and parishes in the implementation of the Planning and Construction Manual.
- c. To serve as a resource and a consultation body to the Diocese and Parishes in matters relating to buildings and real estate.
- d. To review and approve all plans for new construction and renovation in the diocese.
- e. To approve the purchase and/or sale of all properties of the Diocese.
- f. To manage the Diocesan Land Trust and in consultation with the Deans, and make recommendations for purchases from the Trust.
- g. To approve all final construction documents and plans and to recommend such documents to the Bishop for signature.

4. ROLE LIMITATION

The Bishop will regularly accept and implement the recommendations and actions of the Commission. Where he feels that other considerations, especially those of Pastoral matters, make it inadvisable to accept implement the recommendations of the Commission, he shall promptly inform the Commission in person or in writing, setting forth his reasons. In all cases, the decision of the Bishop shall be final.

5. MEMBERSHIP

The Building and Real Estate Commission of the Diocese of Raleigh shall be composed of persons with competencies and experiences which are related to building and real estate fields. They should also have knowledge of the laws and regulations, civil and ecclesiastical, which relate to building and real estate. At least eight members will be lay persons and at least three will be priests of the Diocese of

Raleigh. The Chancellor will serve as a voting, Ex-Officio Member. The Director of Liturgy of the Diocese will also serve as a voting, Ex-Officio Member.

Members of the Commission will serve a term of four years, renewable at the will of the Bishop. The Commission will elect a Chairperson in January to a term of two years. The Director of Business Services Division and the Construction Coordinator for the Diocese will serve as non-voting, Ex-Officio Members of the Commission. The Construction Coordinator will serve as Secretary to the Commission.

6. MEETINGS

The Building and Real Estate Commission will meet on a monthly basis at a time and place mutually agreed upon by the membership. The Chair may call special meetings as the need arises. Approval of matters before the Commission requires a vote of a majority of voting members, including the vote of the Chairperson of the Commission, who will vote on every matter before the Commission for approval. If a quorum is not present at the time of the vote, the action will be tentative, pending final approval of a duly constituted quorum of the Commission. A quorum will consist of half or more of the then current voting members of the Commission.

7. SPECIAL COMMITTEES

The Chairperson may, when appropriate, appoint special ad hoc committees to consider items in greater detail and to report to the Council on their recommendations.

2.15 PARISH CONSTRUCTION PROGRAMS

2.15.1 DETAILED EXPLANATIONS AND SPECIFIC INSTRUCTIONS ON HOW TO HANDLE CONSTRUCTION PROGRAMS ARE CONTAINED IN THE DIOCESAN PLANNING AND CONSTRUCTION MANUAL. Copies may be obtained from the Construction Coordinator.

Highlights of the requirements include:

- The entire parish should be involved in the process.
- A master plan should be developed.
- The use of an architect is preferred to a design-build procedure
- Architects should be invited to present preliminary proposals before one is selected.
- The Superintendent of Schools is to be involved in school construction and renovation.
- Preliminary sketches should be reviewed by the Diocesan Building and Real Estate Commission.
- From the beginning, the Diocesan Building and Real Estate Commission must be involved in planning relating to church construction and renovation.
- Under usual circumstances, major construction projects should be let out for bid.

- Final plans must be reviewed by the Diocesan Building and Real Estate Commission.
- The final contract must be reviewed by the diocesan attorney.
- The Bishop must sign the contract

In its review, the Diocesan Finance Council will expect:

- All parish finances and debts are manageable.
- A Finance Plan prepared by the parish and approved by the Finance Council must be completed before an approval to hire an architect or sign a design build contract.
- Approximately one-third of the construction costs must be on hand prior to building.
- The total indebtedness should not exceed \$1,500 per family.
- Exceptions to the above norms will be made with good reason.
- Financing will be arranged only through the Business Office.
- All notes and mortgages must be approved by the Diocesan Finance Council, the diocesan attorney, and signed by the Bishop.

The above is intended for informational purposes only. Consult the Manual for complete requirements.

2.16 FINANCE

2.16.1 Diocesan collections approved for the Diocese of Raleigh are:

January	Church in Latin America
February	Aid to the Church in Central & Eastern Europe
March	Bishop's Annual Appeal
March	American Bishop's Overseas Appeal
March	Operation Rice Bowl
April	Catholic Home Missions Appeal
Good Friday	Holy Land Shrines
May	Catholic Communications
June	Black & Indian Home Missions
June	Collection for Holy Father
September	Catholic University
October	Mission Sunday
November	Campaign for Human Development
December	National Retirement Fund for Religious

Collection date set at discretion of pastor for: Priests' Welfare & Retirement payment due within two weeks of the collection or on June 30, whichever is first.

Parishes are required to promote and observe these special collections. Collections are to be sent to the Business Office within two weeks of the collection.

Envelopes for all special collections should be included in parishioner's envelopes.

Envelope companies usually ask for the diocesan list of collections. They will insert the proper envelopes in the packets mailed to parishioners.

2.16.2 Pastors must receive permission from the Bishop when a capital expenditure is more than \$10,000. Requests for approval of such expenditures should be sent to the Director of Business Services for processing.

2.16.3 Parishes should not keep large amounts in checking accounts or savings or other investments. Total funds on hand should not exceed six weeks cost of operations.

Amounts in excess of this should be deposited with the Diocese to provide capital for parish loans. Competitive, or nearly competitive, interest will be paid on parish deposits with the Diocese.

2.16.4 Parishes must use the system of diocesan accounting or one approved by the Director of Business Services and the diocesan chart of accounts. They are urged to keep their books on a parish computer.

2.16.5 Parishes may not incur lease, loan or installment debt unless this has been approved by the Diocesan Finance Council.

2.16.6 The pastor is the person responsible for parish finances and, in ordinary circumstances, should sign all checks.

2.16.7 DIOCESAN LOAN POLICIES

1. PRINCIPLES:

- a. An emphasis of our Church is our community life, that is helping one another. Therefore, in the matter of providing funds for land purchase, construction of church buildings, and renovation of old buildings, there is need of a common and coordinated policy.
- b. All properties are in the name of the Bishop of Raleigh; therefore, he alone may authorize the borrowing of funds. The Bishop delegates his authority through the Chancellor and the Diocesan Finance Council (DFC).
- c. It is not likely that we shall experience stability in financial matters in the foreseeable future, e.g., interest rates will fluctuate, there will be substantial growth in North Carolina, and diocesan funds may not always be available. An annual review of these policies and practices will be necessary.
- d. The Diocese and parishes shall work together in these matters. Fairness and a desire to help one another should guide all in providing loan funds.

2. POLICIES:

- a. Small churches and churches which have extreme financial difficulty are eligible for interest-free loans from the Diocese. Specific decisions are made by the Diocesan Finance Council.
- b. The diocese has established, from its resources, a pool of funds designated to be used for loans to parishes.
- c. Once each year, parishes could be asked the amount of funds they expect to borrow during the course of the next 36 months.
- d. The Diocese will endeavor to secure funds as necessary and prudent to provide financing for parish loans. Parishes may borrow only from the Diocese. The interest rate paid by parishes for diocesan loans will be set by the Finance Council and will reflect the cost of funds to the Diocese. So that parishes may appropriately budget, the monthly loan payments of the parish shall be set at the time the loan is approved. If interest rates go up, the number of months for repayment of the loan will be extended. The number of months will be made shorter if rates go down.
- e. The DFC is the appropriate collegial body to discuss the status of parish finances and loans with the individual parish.
- f. Funds borrowed to purchase land for a new parish are always borrowed interest-free. This is the Diocese's way of participating in the orderly development of the Diocese. The Diocese also has a Land Development Trust for the purpose of purchasing land at a favorable cost and holding it for a parish until needed, at which time the parish buys the land from the Trust. When considering \possible new land it is important to involve the Director of Business Services.
- g. Because, at some time, all parishes have borrowed funds from the Diocese at favorable rates, when parishes have a surplus of funds, these funds must be placed on deposit at the Diocese for the use of parishes that need the funds at the time. Parishes should not keep more than is necessary for normal operations in their individual checking accounts. The rate of interest paid to parish depositors is established twice a year in June and January at the same time as the borrowing interest rate.

2.16.8 EMPLOYEE FIDELITY COVERAGE

All parishes have Employee Fidelity Coverage against fraud and certain kinds of theft by specific employees through Arthur J. Gallagher. To be able to provide this coverage to all, and in keeping with sound and generally accepted financial controls, the following practices are required of every parish and school.

1. A different person reconciles bank statements from the one who writes the checks.

2. A different person gives the accounting for contributors from the person who counts the money.
3. A different person from the one who counts the money deposits the money.

2.16.9 LEGAL

No legal matters may be entered into with consultation with the Chancery or Diocesan Business Office who may then seek the assistance of the Diocesan Attorney. Any contract, or time purchase agreement valued at \$10,000 or more, must be signed by the Bishop.

All serious legal matters must be reviewed by the diocesan attorney. Pastors and pastoral administrators may seek legal assistance directly from the diocesan attorney. They will be billed by him for his service on their parish statement. Upon prior consultation with the diocesan attorney, preliminary legal work may be done by attorneys in the parish. The correct legal title of land in the diocese is:

Michael F. Burbidge, Bishop of the Roman Catholic Diocese of Raleigh,
North Carolina, and his successors in office.

The correct title for diocesan or parish owned cars is:

Roman Catholic Diocese of Raleigh

Titles for land must be processed through the diocesan attorney. Titles for vehicles must be processed through the Diocesan Business Office.

Frequently used identification numbers for the diocese and its programs are:

Auto Fleet Policy

Church Mutual (Arthur J. Gallagher)

Parishes which have Bingo may not contract with “professional” operators seeking to improperly use the tax exempt status of non-profit groups for their games. All state and local laws must be followed.

No parish, clergy, religious, employee, or agent of the Diocese or its affiliates may establish a corporation to carry on activities of the Diocese or for the benefit of the diocese without prior written approval of the Bishop.

No one except the Bishop or his expressly appointed delegate may sign any legal contract including deeds, installment sales contracts or leases. In the absence of the Bishop, the ordinary delegate is the Chancellor.

Wills and bequests of money, real or personal property, or other assets to parishes, the Diocese, agencies, and institutions of the diocese and the church in general are encouraged. The Stewardship & Development Office is available to assist in this area.

The Chancellor must be notified immediately when a bequest is given a parish, and furnished with details of the gift.

It is required that the Office of Stewardship & Development be immediately notified when a parish or agency of the Church is named the beneficiary of an estate. A copy of the Last Will and Testament of the donor is encouraged and will assist with planning. If the donor chooses to remember the Catholic Church in their Will, the gift should be listed as follows:

For Diocesan Gifts:

“I give, devise, and bequeath to Michael F. Burbidge, Bishop of the Roman Catholic Diocese of Raleigh, North Carolina and his successors in office the sum of \$_____ (or _____ percent of my estate, or a specific piece of property) for its general uses and purposes.”

For Parish Gifts:

“I give, devise, and bequeath to Michael F. Burbidge, Bishop of the Roman Catholic Diocese of Raleigh, North Carolina and his successors in office the sum of \$_____ (or _____ percent of my estate, or a specific piece of property) for the benefit of _____ Parish, City).”

For Gifts to Catholic Charities:

The legal name for our Catholic Social Ministries office is:

Catholic Charities of the Diocese of Raleigh, Inc.

If your client wants to designate the gift for the Raleigh office, it should be designated for the Raleigh Regional Office of Catholic Charities of the Diocese of Raleigh, Inc.

For Gifts of a CRT to Diocese:

Upon the death of the Recipient(s), the Trustee shall distribute all of the then principal and income of the Trust, other than any amount due the Recipient or the Recipient’s estate to Michael F. Burbidge, Bishop of the Roman Catholic Diocese of Raleigh, North Carolina and his successors in office to be used for its general uses and purposes.”

Remember that all Church property is listed in the name of the Bishop of Raleigh, not an individual parish (although the parish retains beneficial ownership of gifts intended for parish use).

2.16.10 TAX

North Carolina has a sales tax which can be refunded to churches and schools. Forms can be secured from: The Department of Revenue, Raleigh, North Carolina 27611. It is called "Claim for Refund of State and County Sales and Use Taxes." Parish personnel should keep receipts for this tax return, e.g. merchandise, groceries, and other capital expenditures. These forms must be filed twice a year – by April 15 and October 15. Churches should pay this tax and then seek the refund. Churches and schools must pay the tax when reimbursing an employee for a legitimate business expense. Churches and schools may not claim a refund for that portion.

Property tax must be paid on all land not being directly used for church or school purposes.

2.16.11 COMPUTER

1. The Diocese has a computer system which can provide the following services for parishes:
 - a. Parish and school bookkeeping;
 - b. Parish rosters;
 - c. Census information;
 - d. Capital Fund Campaign pledge invoicing and collection.

For other services, contact the Business Office.

2. Parishes should not purchase a computer or computer software without consulting the Diocesan Business Office. Hardware and software standards have been established to accommodate transferring priests, provide for diocesan and parish to parish support and provide a basis for possible future diocesan integration. Parish records may not be kept on software other than that approved by the Diocesan Computer Committee.

Parishes and schools using the Automated Church Software (ACS) are required to purchase all updates for the modules it uses through purchase of a support contract from the supplier. This action was taken by the Diocesan Computer Committee to ensure that all parishes are using the same version of the program modules. The purpose of this policy is to provide for ease of operation when pastors are transferred from one parish to another. It is considered too burdensome and impractical to expect priests to learn new software packages when they are transferred. Likewise, it is impractical for a new pastor to require the parish staff to learn new software when he arrives. Additionally, support from either the diocese or neighboring parishes is made possible when everyone uses the same programs.

2.16.12 GUIDELINES FOR THE SALE OF PARISH PROPERTY

It will be the policy of the Diocese of Raleigh that before parish property can be listed for sale and/or before any offers to purchase parish property can be solicited or discussed with potential buyers, approval must be received from the Building & Real Estate

Commission. That approval must encompass both approval in concept to sell the property and approval to sell the property within set financial guidelines. The normal approval is within 90% of the bona fide appraised value of the property. The Bishop will sign listing agreements or contracts for sale of property only after these steps have been taken. Parishes wishing to sale parish property and the proceeds will be used towards another purchase must have a finance plan approved before the existing property can be listed for sale.

2.16.13 POLICY ON THE HOLDING OF STOCK BY PARISHES

It is the policy of the Catholic Diocese of Raleigh (both parishes and Catholic Center) not to hold individual shares of stock or other similar speculative investment vehicles. The only exception to this rule is the Diocese of Raleigh General Investment Fund, which is managed by an outside professional Fund Manager and managed as a long term investment. When parishes or the Catholic Center receive gifts of stock, they should be immediately sold and converted into cash. The Diocese can assist parishes in converting stock gifts into cash. If the cash obtained from the sale of the stock is not immediately needed by a parish, it should place the excess funds on deposit with the Diocese. As with all parish funds on deposit with the Diocese, it can be withdrawn on demand. Any parishes wishing to do so should contact the Office of Stewardship & Development.

A. ELECTRIC TRANSFER BY BROKER

- **Please communicate the following information to your broker**

To: _____
 (Broker’s Name & Company)

Please transfer _____ shares of _____ stock from my

Account _____ to:

**Wachovia Securities
 3105 Glenwood Ave. Suite 201
 Raleigh, NC 27612
 David Wiley – (919) 571-2806
 ACCOUNT # 8288-0036
 DTC # 0141**

I / we hereby authorize the above stock transfer:

 (Signature) (Date) (Signature) (Date)

B. DIRECT DONATION OF CERTIFICATE

1. If certificate is titled in the name of the donor:
 - a. Sign certificate
 - b. Include a “letter of intent” with your name, address, stock and shares and intent (e.g., Diocese of Raleigh – God’s Work Our Challenge)
 - c. Send by registered mail (or deliver) to the Diocese or deliver to Wachovia Securities office. Do not deliver stock to a Wachovia Bank location
 - d. Send copy of this two page completed form to the Diocese
2. If certificate is titled in the name of the Diocese:
 - a. Send by registered mail (or deliver) to the Diocese, along with this two page completed form.

PLEASE SEND COPIES OF PAGES 1 AND 2 TO:

**Office of Business Services
 715 Nazareth Street
 Raleigh, NC 27606-2187
 Fax: (919) 821-9768**

2.16.15 BUYING A VEHICLE

The following steps should be followed when purchasing a vehicle.

1. If the purchase price is \$7,500 or more OR if financing of the purchase is required, then approval of the Bishop is necessary. A request for expenditure approval and/or approval to borrow money should be forwarded to the Director of Business Services for action.
2. When the vehicle has been selected, the pastor or his designate should contact the diocesan business office. The vehicle make, model, year and vehicle identification number along with the parish/school/institution name and city is needed by the business office to add the vehicle to the diocesan files. It is best to e-mail or fax this information.
3. Before the vehicle leaves the dealer's lot or before ownership is assumed, the diocesan insurance agent must be notified of the purchase and asked to add the vehicle to the insurance policy. Most dealers will offer to take care of this for you. Before adding the vehicle to the policy, the insurance agent will contact the diocesan business office to verify that the addition is legitimate. This approval cannot be granted if Step #2 has not been completed.
4. When you purchase a vehicle from a dealer, the dealer will typically take care of obtaining the title and registration. Permanent vehicle tags are available for buses and vans that will be used exclusively to haul children to and from religious education classes. The dealer or whoever is processing the paperwork for the title must be instructed to use the following name and address:

Roman Catholic Diocese of Raleigh
715 Nazareth Street
Raleigh, North Carolina 27606-2187

The county of registration is Wake.

The application for title and registration can be taken to any Department of Motor Vehicles office in the state. It does not have to be done in Wake County.

After the title is processed, it will be mailed directly to the Catholic Center by the Department of Motor Vehicles, unless there is a lien holder. In the case of a lien, the title will be mailed to the lien holder.

5. A few counties in North Carolina require an emission test along with the annual safety inspection. Wake County is one of those counties. However, vehicles which are registered in Wake County but are permanently based and operated outside of emission controlled areas can obtain an exemption from the emission inspection.

To obtain an exemption, go to your local Department of Motor Vehicles office and ask for an Exemption from Emission Inspection. A DMV officer will issue an

exemption certificate that will be valid as long as the vehicle is based outside an emission control area.

2.16.16 SELLING A VEHICLE

The following steps should be followed when selling a vehicle:

1. Contact the diocesan business office to be sure the title is on hand. If a lien exists on the vehicle, the lien holder must be contacted to determine the amount of the lien and the procedures for paying off the balance.
2. Find a buyer for the vehicle and agree to the terms of the sale.
3. After the sale is agreed to, contact the diocesan business office to request the title. The following information will be needed by the business office.

Make, Model, Year and Vehicle Identification Number
Name and address of the buyer as the buyer would like it to appear on the title
Current mileage on the vehicle

The signed and notarized title will then be mailed to the parish, school, or institution.

4. After the new owner has accepted responsibility for the vehicle and the license tag has been removed, contact the diocesan insurance agent and ask that the vehicle be removed from the insurance policy.

Before removing the vehicle from the policy, the insurance agent will contact the diocesan business office to verify that the deletion is legitimate.

5. If a replacement vehicle is being purchased at the same time or in the very near future, the license tag may be retained and transferred to the new vehicle. If a replacement vehicle is not going to be purchased within the next month, the license tag should be turned in at any Department of Motor Vehicles office and the receipt mailed to Business Services at the Catholic Center.

2.16.17 DONATED VEHICLE FOR PARISH USE

From time to time, individuals wish to donate a vehicle to a parish. The following steps should be followed when accepting a donation of a vehicle which is going to be kept by the parish.

1. Issue a letter to the donor thanking them for the gift. A value should not be stated. It is the responsibility of the donor to determine the value of their gift. Rather, include a description of the vehicle. For example, "...thank you for the gift of the blue 1979 Ford Escort." OR "...thank you for the gift of the 1984 Toyota pickup truck with camper shell."
2. The donor should complete the section on the title which transfers ownership. Vehicle titles are recorded in the name of the diocese, not the parish. Therefore,

assignment should be made to the Roman Catholic Diocese of Raleigh, 715 Nazareth Street, Raleigh, North Carolina 27606-2187.

3. The pastor or his designate should contact the diocesan business office. The vehicle make, model, year and vehicle identification number along with the parish/school/institution name and city is needed by the business office to add the vehicle to the diocesan files. It is best to phone or fax this information.
4. Once ownership is assumed, the diocesan insurance agent must be notified and asked to add the vehicle to the insurance policy. Before adding the vehicle to the policy, the insurance agent will contact the diocesan business office to verify that the addition is legitimate. This approval cannot be granted if Step 3 has not been completed.
5. A new vehicle title and registration must be obtained. Permanent vehicle tags are available for buses and vans that will be used exclusively to haul children to and from religious education classes. Whoever is processing the paperwork for the title should be instructed to use the following name and address:

Roman Catholic Diocese of Raleigh
715 Nazareth Street
Raleigh, North Carolina 27606-2187

The county of registration is Wake.

The application for title and registration can be taken to any Department of Motor Vehicles office in the state. It does not have to be done in Wake County. However, applications for permanent vehicle tags must be processed in Raleigh at the downtown location. This may be done by mail or in person.

After the title is processed, it will be mailed directly to the Catholic Center by the Department of Motor Vehicles.

6. A few counties in North Carolina require an emission test along with the annual safety inspection. Wake County is one of those counties. However, vehicles which are registered in Wake County but are permanently based and operated outside of emission controlled areas can obtain an exemption from the emission inspection.

To obtain an exemption, go to your local Department of Motor Vehicles office and ask for an Exemption from Emission Inspection. A DMV officer will issue an exemption certificate that will be valid as long as the vehicle is based outside an emission control area.

2.16.18 DONATED VEHICLE TO BE DONATED TO A THIRD PARTY

From time to time, individuals wish to donate a vehicle to a parish. The following steps should be followed when accepting a donation of a vehicle which the parish is going to immediately turn over to a third party.

1. Issue a letter to the donor thanking them for the gift. A value should not be stated. It is the responsibility of the donor to determine the value of their gift. Rather, include a

description of the vehicle. For example, "...thank you for the gift of the 1979 Ford Escort." OR "...thank you for the gift of the 1984 Toyota pickup truck with camper shell."

2. The donor should complete a MVR-63 form. This is a power of attorney form which will allow for transfer of ownership to a third party. The donor fills out nothing on the title itself. The form is available at any Department of Motor Vehicle office or from the diocesan business office.
3. The vehicle, the title and the power of attorney form should be turned over to the parish.
4. When the parish has determined who the third party is that will receive the donated vehicle, the assignment of title on the back of the title is then completed. With the title and the power of attorney form, the third party can then have a new title issued in their name.

2.16.19 USE OF NON-CONFORMING VANS FOR TRANSPORTATION OF CHILDREN

Diocesan policy prohibits the use of vans that carry 11 or more persons (i.e. 15-passenger vans) for the transportation of children (anyone under 18 years of age). This includes private (parents or volunteers) using their personal 15-passenger vans to transport children for any parish or church related event. The National Highway Traffic Safety Administration points out that the sale of an 11+ passenger van for use in transporting children is illegal. The North Carolina Department of Public Instruction states that if you are transporting children, the vehicle should conform to "School Bus" standards. The label on the door frame of the vehicle should state "School Bus or Bus". This applies if you are renting or purchasing a vehicle that you will be using to transport children. A word of caution: many 15-passenger vans will be labeled as a bus (not a school bus) because, by definition, they transport more than 10 people, this vehicle does not conform to Diocesan policy.

2.16.20 CATHEDRATICUM ASSESSMENTS

Each parish is assessed Cathedraticum fees that are paid to the Diocese in quarterly installments. Cathedraticum is assessed based on 9.0% of the prior year's offertory. Beginning in 1993-94, campus ministry sites (except for UNC-Chapel Hill) are exempt from Cathedraticum assessments.

2.17 PERSONNEL POLICIES

Personnel policies and practices of the Diocese are presented in the Employee Handbook and Employee Benefit Booklets and documents. Parish employees are entitled and must be provided employee fringe benefits on the same eligibility basis as employees of the Diocese. Except as otherwise noted, policies apply only to Diocesan employees. However, parishes are urged to follow the practices and procedures in the Diocesan Employee Handbook to the fullest extent practical.

It is the policy of the Diocese that all problems be handled at the lowest possible level.

Individuals with problems which cannot be resolved on the parish level may be assisted by the Area Dean or the Diocesan Director of Human Resources.

1. For problems dealing with employee/employer matters, the individual should be referred to the Director of Human Resources of the Diocese.
2. For all other problems within the parish, the individual should be referred to the Area Dean

In both the above cases, the individual should be advised to first notify his/her pastor/supervisor that he/she will be contacting the Director of Human Resources or Area Dean for assistance.

If an employee has a concern about any of the following matters set forth below, the employee is required to promptly report these circumstances to the Director of Business Services or the Director of Human Resources.

- Perceived violations of federal, state or local laws or regulations.
- Gross mismanagement, waste, fraud embezzlement or neglect of duty.
- Actions that are in violation of express Diocese of Raleigh policies.
- Actions that threaten or are viewed as harmful to the health, safety and/or welfare of others.

In addition to, or in lieu of reporting the foregoing to any of the persons listed above, an employee may send a written complaint directly to the Chancellor of the Diocese.

Failure by an employee to report any of the above circumstances could result in disciplinary action, up to and including discharge.

All persons, who in good faith report matters pursuant to this policy, shall be protected from disciplinary treatment and workplace retaliation.

Please contact the Office of Human Resources for a complete copy of the Employee Handbook.

2.18 POLICY ON RENTAL OF PARISH FACILITIES

As integral parts of a universal church, parish and school facilities in the Diocese of Raleigh are sometimes used by other Catholic parish, by Catholic schools, or by the Diocesan offices for church related functions.

It is the policy of the diocese of Raleigh that no parish or school will charge facility rental fees to other Catholic parishes, to other Catholic schools, or to the Diocesan offices for the use of parish or school facilities for church related functions.

However, any parish or school is entitled to recover its bona fide direct costs related to maintenance, setup, cleanup, and similar activities related to functions held at its facilities by these groups.

At the discretion of the local parish, fees may be charged for the rental of church or school facilities by other not-for-profit outside organizations, but only fees to recover expenses may be charged parishioners for the use of a parish hall for receptions and similar activities.

2.19 ALCOHOLIC BEVERAGES ON CHURCH PROPERTIES

At the March 13, 2002 Meeting of the Priests' Council, the following policy regarding alcoholic beverages on church properties was approved. Hard liquor is not permitted to be sold or served on church property (except for rectories). Beer and wine can be served on church property. Beer and wine can also be sold at parish fundraisers and picnics. Beer and wine cannot be sold at wedding receptions or other private parties. However, to sell beer and wine, a civil license must be obtained.

HARD LIQUOR

<u>Activity</u>	<u>Sale</u>	<u>Serve</u>
Parish Activities	No	No
Wedding Receptions And other Private Parties	No	No

BEER AND WINE

<u>Activity</u>	<u>Sale</u>	<u>Serve</u>
Parish Activities (Fundraisers/picnics)	Yes	Yes
Wedding Receptions And other Private Parties	No	Yes

PASTORAL ADMINISTRATORS' HANDBOOK

2.20 INTRODUCTION

This handbook has been developed by the Pastoral Administrator Committee of the Diocese of Raleigh. The purpose of this handbook is to document the processes and procedures for the pastoral administrator in this Diocese. The information included in this handbook applies to all persons involved in the Pastoral Administrator Ministry including the pastor, the sacramental minister, the dean, the parish/mission, the Pastoral Administrator Committee, as well as the pastoral administrator. The information included in this handbook should be reviewed and updated as the ministry of the pastoral administrator evolves.

2.20.1 PREFACE

Canon 517.2 establishes the role of the pastoral administrator.

If the Diocesan bishop should decide that due to a dearth of priests, a participation in the exercise of the pastoral care of a parish is to be entrusted to a deacon or to some other person who is not a priest or to a community of persons, he is to appoint some priest endowed with the powers and faculties of a pastor to supervise the pastoral care.

The pastoral administrator is a woman or man to whom the exercise of the pastoral care of the parish/mission is entrusted. This care includes the following areas: education, pastoral services, worship, and administration.

2.20.2 RESPONSIBILITIES AND DUTIES OF THE PASTORAL ADMINISTRATOR

A. Pastoral

Collaborates with the pastor on the progress of the parish/mission. Invites and welcomes him to the community, showing the parishioners that those ministering to them are one in spirit and intention

Resides in the local community and provides the kind of pastoral leadership which will encourage the spiritual growth of people.

Invites lay leadership through participation in parish/mission activities.

Provides for the care of the sick and shut-ins of the parish/mission.

Provides for the individual pastoral needs of the parishioners.

Encourages and participates in local ecumenical groups.

Supports local and city organizations as appropriate.

Studies the Diocesan Pastoral Administrative Manual and all Diocesan policies and procedures. (See Appendix B – Bibliography)

B. Worship

Collaborates with the pastor and sacramental minister to provide sacramental ministry in the parish/mission.

Ensures that the celebration of the Eucharist is at the center of the life of the faith community.

Creates an atmosphere of prayer according to liturgical norms and pastoral setting.

Ensures proper training for lay ministers to participate in the liturgy.

Provides opportunities for community prayer.

Nurtures the sacramental life of the faith community through preparation for the sacraments of initiation, healing, and commitment.

C. Faith Development

Identifies catechetical and pastoral needs.

Develops and evaluates programs.

Chooses resources in collaboration with catechists.

D. Ministry Formation and Training

Oversees the training of catechists and other ministries

Represents local and Diocesan programs, policies and events to specific groups and to the total parish/mission community.

Develops lay leadership.

Provides opportunities for faith development and evangelization.

Develops parish/mission social ministry and outreach.

E. Administrative

Presides at the parish/mission Pastoral Council and Finance Council

Oversees all parish/mission activities.

Attends deanery meetings and promotes deanery and Diocesan programs and activities.

Maintains parish/mission records.

F. Planning

Bases catechetical and pastoral decisions on the parish/mission statement.

Develops parish/mission Pastoral Council.

Ensures that the pastoral plan is a living document that is kept before the community throughout the year.

Upholds the Pastoral Council Constitution and encourages respect for the collegial process.

G. Budgeting/Stewardship

Prepares an annual budget with the Finance Council.

Keeps parish/mission records.

Oversees parish/mission property.

Selects responsible adults to share in this stewardship.

2.20.3 RELATIONSHIPS AND RESPONSIBILITIES OF OTHERS

A. Pastor

The pastor participates in the selection process of the candidate for the pastoral administrator position.

The pastor is responsible for supervising the ministry of the pastoral administrator. He is also responsible for providing sacramental services.

The pastor and pastoral administrator show support for and collaboration with one another through regular communication and mutual respect for each other's responsibilities.

B. Sacramental Minister

The ordained sacramental minister is assigned with the pastoral administrator consultation.

The ordained sacramental minister is to preside at the Eucharist on weekends, Holy Days, and on other special occasions and arranges for a substitute when he is away. He collaborates with the pastoral administrator in matters that concern sacramental and liturgical celebrations, in keeping with liturgical norms of the Diocese and the traditions of the parish/mission.

The ordained sacramental minister and pastoral administrator show support for and collaboration with one another through regular communication and mutual respect for each other's responsibility. The spirit of the parish/mission is one of welcome and hospitality to the sacramental minister.

C. The Bishop

The Bishop appoints the pastoral administrator for a three (3) year term renewal every three (3) years not to exceed twelve (12) years.

The Bishop meets with the pastoral administrators as a group periodically (usually once a year).

D. The Dean/Deanery

The relationship and responsibility of the dean and deanery to the pastoral administrator in the areas of education, pastoral services, worship, and administration is the same as that for a pastor.

E. The Parish/Mission

The parish/mission will work with the pastoral administrator to provide housing, transportation, salary and insurance, according to Diocesan guidelines.

F. The Pastoral Administrator Committee

The Pastoral Administrator Committee works as a search committee and will consult with the Pastoral Personnel Committee, along with the dean, the pastor and the parish/mission, whenever a pastoral administrator is being placed in a parish/mission.

The committee is composed of pastoral administrators, lay people, a representative of the Presbyteral Council, a representative of the Pastoral Personnel Board and other resource people who are deemed necessary by the committee. The vicar general and the Bishop are ex-officio members.

The committee is available for consultation with any pastoral administrator who needs assistance in clarifying an issue. It acts towards the pastoral administrators

as the Pastoral Personnel Board does time and coordinate the reappointment and transfer process and surfacing of new candidates for appointments.

The committee's recommendations for appointment are made to the Bishop through the Pastoral Personnel Board.

The committee works with the Pastoral Personnel Board and the deans in surfacing available parish/missions and consults with each regarding the recommendation of appointments and reappointments.

The committee actively coordinates the recruitment and screening of candidates for positions as pastoral administrators. Appointments need to be determined in the first quarter of the calendar year.

The committee should be a resource during the restructuring or realignment of parish/missions and be consulted on the availability of candidates for a pastoral administrator role.

F. The Diocesan Pastoral Personnel Committee

The pastoral personnel committee should, when possible, ensure a cooperative attitude among the pastor, the sacramental minister, and the pastoral administrator. All assignment of personnel should be made with the consultation of all parties.

2.20.4 EMPLOYMENT SPECIFICATIONS

A. Identification of Potential Candidates

When a pastoral administrator position becomes available, the opening should be advertised first via the following: The North Carolina Catholic, the Catholic Center bulletin board, other parish/mission and Diocesan publications. If suitable candidates are not identified through these means within four weeks, the ad should be sent to local and national newspapers, as well as to heads of religious orders.

Open pastoral administrator positions can be requested by any of the current pastoral administrators interested in a transfer. Listings will be available through a letter from the Pastoral Personnel Board.

B. Application Process

Potential candidates are identified through the following application process:

Submit resume: Resumes should be submitted to the Diocesan Personnel Office, which will forward the resume to the Pastoral Administrators' Committee.

Professional references should be submitted with the resume. Religious applicants should also include a letter of reference/recommendation from their community.

The resumes will be reviewed by the Pastoral Administrator Committee. The Committee will schedule screening interviews to be conducted by the Pastoral Administrator Committee. These interviews may be conducted in conjunction with the Diocesan Pastoral Personnel Board, the pastor, and the dean.

If the Pastoral Personnel Board and/or pastor do not participate in the initial interview, the best candidate identified by the Pastoral Administrator Committee will then be interviewed by the Pastoral Personnel Board, the pastor, and the dean.

These interviews may be conducted separately or simultaneously depending on the circumstances of the parish/mission and candidate.

If the candidate is satisfactory, the Pastoral Personnel Board recommends the candidate to the Bishop for appointment. The candidate then meets with the Bishop. Upon his approval, the Bishop notifies the committees of his decision and sends a letter of appointment to the candidate.

C. Qualifications

The pastoral administrator can be a lay, religious order person or a deacon. The following apply according to the background of the candidate:

1. Minimum Requirements

Pastoral and administrative experience as opposed to institutional experience for this position. It is desirable that the candidate have some pastoral experience within the Diocese of Raleigh.

Theological training through Diocesan and parish/mission experiences including those in other dioceses.

College degree, a Bachelors of Arts or Science. A Master's degree or equivalent is preferred.

2. Additional training should include one or more of the following:

Participation in the LIMEX (Loyola Institute of Ministry Extension program).

Participation in the Lay Ministry Formation Program of the Diocese.

Seminars/courses offered by the Diocese.
Nationally sponsored courses, seminars, and programs.

D. Personal Talents and Gifts

Leadership ability

Ability to work with people, especially in a team setting involving the pastor and the ordained sacramental minister.

Ability to encourage the development and exercise of gifts among team members and parishioners.

2.20.5 TERM OF APPOINTMENT AND RENEWAL

The initial appointment of a pastoral administrator will be for three (3) years. The Administrator can request another three (3) year term. If the pastoral administrator so desires, he/she should write to the Bishop and request another term of three (3) years by October 1 of the prior year.

For religious personnel, further extensions of renewal would be contingent upon negotiation between the Diocese and the religious community. Additional extensions beyond two terms will require a letter of intent eight months prior to the end of the term. Additional extensions will be on a year to year basis.

A pastoral administrator who wishes to resign should notify the pastoral Personnel Board and Pastoral Administrator Committee by October 1 of the prior year.

The appointment should be confirmed in the first quarter of the year, with the term to begin July.

Whenever a pastoral administrator chooses to leave a parish/mission, the Pastoral Administrator Committee will conduct an abbreviated parish/mission identification process again to ensure that the conditions are still suitable for this Ministry. (See Parish/Mission Identification and Orientation)

2.20.6 PROBLEM SOLVING/GRIEVANCE PROCESS

The Diocese of Raleigh provides a method of resolving grievances between employer and employee (Section 880 – Employee Handbook: Employee Problem Solving). These procedures can be used to address either party's grievances, if necessary.

2.20.7 COMPENSATION

The stipend for a religious pastoral administrator in the Diocese of Raleigh shall be a least equal to that provided to all religious in the Diocese. The amount provided is evaluated annually and recommended to the Bishop for approval. The sacramental minister shall receive an agreed stipend.

A lay pastoral administrator will receive a full salary and benefits. The salary range shall be commensurate with that published annually by the Diocese. A person appointed as pastoral administrator, whether religious, lay person, or a deacon is considered a regular full-time employee and is entitled to receive all benefits provided (Section 301-303 – Employee Handbook: Employee Benefits).

For a religious pastoral administrator, contribution of the current retirement amount designated by the Diocese is paid directly to the religious community. All others will come under the Diocesan Retirement Plan.

The additional benefits listed below do not apply to those on full salary. The receipt of the additional benefits can be negotiated against a full salary. Additional benefits not specified or included in the overall employee benefits package and provided by the parish/mission for pastoral administrators include:

- Car and related expenses
- Housing & Utilities: rent and utilities, if parish/mission owned housing is not available
- Continuing Education: allowance is equal to that provided to priests
- Vacation benefits: Religious – three (3) weeks vacation and one (1) week retreat regardless of the number of years of employment in the Diocese
- Roundtrip to Motherhouse/Provincialate: one (1) per year

2.20.8 PARISH/MISSION IDENTIFICATION AND ASSESSMENT

A. Identification and Assessment of the Parish/Mission

Within the approved Ten-Year Ministry Plan of the Diocese, the Pastoral Personnel Committee, the deans, and the Pastoral Administrator Committee identify parish/missions that could benefit from this ministry.

The process of examining the ministry of pastoral administration with the parish/mission begins as soon as the parish/mission is identified as one which would benefit from this ministry. The Pastoral Administrator Committee representatives will have discussions with the parish/mission Pastoral and Finance Councils to ensure that they understand what would be provided by this ministry and the extent of ownership that the parish/mission would need to take.

B. Formal Proposal

The formal proposal to the Bishop to appoint a pastoral administrator to a parish/mission should be made with the consultation of the parish/mission, the pastor, the dean, and the Pastoral Personnel Committee. The Pastoral Personnel Committee makes this proposal.

C. Transition

Whenever a pastoral administrator chooses to resign or is removed, the parish/mission Identification and Assessment process should be reviewed to ensure that this ministry could continue at this location.

D. Placement of a Pastoral Administrator

The pastoral administrator should meet with the pastor, representatives of the Pastoral Administrator Committee and at least one experienced pastoral administrator to discuss this new position.

A meeting with the dean should be arranged to establish their relationship.

The time for installation of the pastoral administrator will be at the discretion of the dean. See Appendix C for the Installation Ceremony.

A new pastoral administrator will be invited to participate in the annual orientation of new pastors. This generally occurs in August.

The Pastoral Council will provide an occasion to welcome the pastoral administrator.

E. Placement of a Pastoral Administrator and Sacramental Minister

The newly assigned pastor and/or sacrament minister should meet with the vicar general, the dean and the pastoral administrator to clarify his new role.

The pastoral administrator and pastor/sacramental minister should establish regular meeting times to ensure open communication and understanding.

2.20.9 CONTINUING FORMATION OF THE PASTORAL ADMINISTRATOR

The pastoral administrator should refer to the pastor and the Pastoral Administrative Manual for guidance on organizing the parish/mission Pastoral Council, Finance Council and supporting committees.

Ministry study days, sponsored by the Priestly Life and Ministry Committee, are generally available to pastoral administrators.

2.10.10 APPENDIX A – INSTALLATION CEREMONY

Ideally the Diocesan Bishop or his delegate should be present and preside over the installation ceremony. Other participants in the liturgical action could include the Pastoral Council Chairperson, the pastor/sacramental minister, a representative from the religious community if the pastoral administrator is a religious, a family member if the person is a lay person.

The Bishop (or delegate) greet the community and offers some brief remarks on the significance of the installation ceremony. He then addresses the new pastoral administrative:

(Name of the pastoral administrator), will you serve the people of (parish) by living to the best of your ability the life of faith demanded by the Gospel and by fulfilling your role as pastoral administrator?

Pastoral Administrator:

I will

Bishop (or delegate):

Will you serve the needs of this community through the ministries of Word, Worship, Service, and Administration in accord with your responsibilities as Pastoral Administrator?

Pastoral Administrator:

I will

Bishop (or delegate):

Will you work with the members of t his community, the priests who will assist with their pastoral care, your pastor, and me/your bishop, to promote a spirit of co-responsibility and respect for one another?

Pastoral Administrator:

I will

Bishop (or delegate) addresses the congregation:

Members of (parish), will you receive (pastoral administrator) as you PA and give him/her the support of your prayers and your cooperation?

People:

We will

Bishop (or delegate):

(Pastoral Administrator), you have expressed your willingness to serve as pastoral administrator of (parish).

I invite you now to receive these symbols of your ministry.

(Representative from the community come forward with a Bible, bowl of water, parish mission statement, financial records.) As each gift is presented, the pastoral administrator receives it and responds to the Bishop (or delegate) as follows:
Scripture

Bishop (or delegate):

Receive this copy of the Sacred Scriptures, the story of our salvation.

Pastoral Administrator:

In a spirit of humility, I receive the Book of Scriptures. May I proclaim and live its message in this community so that our lives will be governed by God's holy word.

Bowl of Water

Bishop (or delegate):

Receive this sign of our common baptism in the Lord.

Pastoral Administrator:

I joyfully receive this symbol of baptism. May I continually call forth the gifts of this baptized community in service to one another.

Parish Mission Statement

Bishop or delegate):

Accept the mission statement of this parish community which describes their calling as followers Christ.

Pastoral Administrator:

I welcome this mission statement as an expression of the vision of this community and their desire to be united in heart and purpose.

