

Historical Archive of Articles

Effective January 1, 2016 the following were replaced:

Article 3750 • Other Benefits for Clergy

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2. For parish and diocesan ministry, a priest (or another entitled person) is reimbursed at the IRS standard business mileage rate of 57.5 cents per mile beginning January 1, 2016. A mileage record or a similar report is to be submitted for the parish records. Secular priests, or those treated as secular for tax purposes, report their annual mileage reimbursement separately at the appropriate place on the income tax return. It is not included on the W-2.
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Effective July 1, 2015 the following were replaced:

Article 3700 • Clergy Salary

Priests in a Diocesan Assignment (FY 2014-15)	
Earned Income	\$1,674
Professional Expense Allowance	\$485
Total Monthly Compensation	\$2,159

Transitional Deacons (FY 2014-2015)

Transitional Deacons (FY 2014-2015)	
Earned Income	\$751
Professional Expense Allowance	\$485
Total Monthly Compensation	\$1,236

...

7. Monthly Compensation for Retired Incardinated Priests:

Retired Incardinated Priests—FY 2014-2015	
Retirement Benefit	\$550
Housing Allowance	\$1,609
Total Monthly Compensation	\$2,159

...

9. Salary for Seminarians (located here for convenience)

Seminarians (FY 2014-15)	
Earned Income	\$891
Total Monthly Compensation	\$891

Diocesan Policy as amended and published 1/21/2015 abolished, followed by its legislative history.

DIOCESAN POLICY

GENERAL LEGISLATIVE DECREE

As Diocesan Bishop of Alexandria, I hereby decree and define that the Articles of the *Diocesan Policy* are particular law in the Diocese of Alexandria (cc. 29; 391).

As particular law, they take precedence over universal laws. As such, they are especially governed by Canons 7 through 22 of the Code of Canon Law.

Subsequent Articles of the *Diocesan Policy* that derogate from earlier Articles take precedence.

Interpretation, dispensation and recourse against these particular laws are to be taken first to the Diocesan Department directly responsible for the matter treated. Appeals may be made to the Office of Canonical Services, and then to the Diocesan Bishop.

Unless it has been specifically approved by the Diocesan Bishop, customs contrary to the *Diocesan Policy* or one that is apart from it are hereby abrogated. All particular laws, decrees and instructions contrary to the *Diocesan Policy* are also hereby abrogated.

The *Diocesan Policy* shall be published to the diocesan website as a single PDF file at [Current Diocesan Policy](#) so that one file contains all the current particular law (the *ius vigens*). For those who lack access to the Internet, a copy can be obtained from the Office of Canonical Services.

Amended and future Articles of the *Diocesan Policy* shall be published to the diocesan website as a single PDF file at [Newly Published Articles](#). They shall be simultaneously incorporated into the current file also so that it always remains accurate. They obtain on the date indicated and have the same effects as these Articles of the *Diocesan Policy*.

Finally, Articles of the *Diocesan Policy* amended or removed shall be published to the diocesan website as a single PDF file at [Historical Archive of Articles](#). Thus, a legislative history file will be developed.

Given this Thirtieth Day of October 2006 A.D. at my chancery to have effect immediately notwithstanding any contrary ordinances, privileges (even worthy of special or individual mention) or customs.

+ Ronald P. Herzog
Most Reverend Ronald P. Herzog
Diocesan Bishop of Alexandria

Patricia Thomas
Notary

Authentic Interpretations

The *Diocesan Policy* is primarily written with parishes, and schools, in view. It applies to all parish organizations, and their school organizations, no matter how they are structured. Furthermore, it also applies to the Diocese of Alexandria itself and its subordinate apostolates whether civilly incorporated or not, as well as to all other entities subject to the Diocesan Bishop. Finally, some institutions and organizations are designated Catholic either by Pontifical decree or some other authority outside of this Diocese; a few others may simply be Catholic by name or in their nature. To the extent these “outside entities” with a presence in the Diocese can be governed by a diocesan bishop, they are also subject to *Diocesan Policy*. For example, a diocesan bishop has governing authority over the Mass when celebrated by anyone. This interpretation is a declaration of what already existed in the words of the laws herein and, therefore, has retroactive effect from their inception.

This *Diocesan Policy* is to be read in conjunction with the [Faculties of Priests and Deacons](#).

Two indices are supplied below. The first is a list in order by Article number, the second by keyword. Use the PDF search function <Ctrl-f> to go to an Article number quickly. The search function can also be helpful in looking for a policy; simply search for a keyword.

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SANCTIFYING, TEACHING AND GOVERNING IN THE LIFE OF THE PARTICULAR CHURCH

Art. 1000 – PARISH PASTORAL COUNCIL

§1. 1° Each parish must have a parish pastoral council, including those that do not have a resident pastor, and a corresponding parish finance council.

2° *MISSION CHURCHES:* If a parish has mission churches, the pastor determines how the parish pastoral councils are to be organized. Some options follow: (1) members from each mission serve on the pastoral council; (2) each mission church has its own pastoral council; (3) the parish pastoral council serves all the churches in the parish without having representation from every mission. Once the model is determined, the councils are established and the relationships follow accordingly.

§2. Responsibilities

1° In the parish pastoral council, which is presided over by the pastor, Christ's faithful, together with those who by virtue of their office are engaged in pastoral care in the parish, give their help in fostering pastoral action. The parish pastoral council is the principal consultative body of the parish for the pastor and to it all other boards, councils and committees shall be responsible to it.

2° The parish pastoral council may establish its own by-laws, but may not act contrary to *Diocesan Policy* or other Church law.

3° Recommendations of the parish pastoral council shall be submitted to the pastor. He in no way is obliged to accede to its recommendations, but he should not lightly disregard its counsel or act contrary to a consensus unless there be a reason that in his judgment is overriding.

4° The parish pastoral council shall meet no less than quarterly. If after dialogue with the pastor, the Council fails to meet, there is failure to follow sound business practices or there is neglect of pastoral responsibilities, each member is personally responsible to make known the facts to the proper dean in writing with a copy to the Diocesan Bishop within one (1) week. Whoever makes such a report is acting fully within his or her rights. No reprisals of any kind shall be taken against this person or any other participant, including employees, in this process.

§3. Membership and Offices

1° Members of the parish pastoral council should be Catholics who are active registered members of the parish. They must be those interested in overall parish-wide development and spiritual growth of the parish.

2° Members may include both elected and appointed parishioners of either sex and without prejudice to racial or ethnic origin.

3° The recommended term for members is three years; renewable once.

4° One member of the parish finance council shall be an ex-officio member of the parish pastoral council.

5° Membership criteria include preparation for parish pastoral council ministry through diocesan and/or parish formation programs, study and prayer.

6° The pastor presides at meetings of the parish pastoral council and is an ex-officio member without vote. Those assigned to Church office by the Diocesan Bishop and other employees designated by the proper pastor in a parish are ex-officio members without vote.

7° Officers of a parish pastoral council, elected by the membership, shall include a chairperson who must have attended diocesan training or have completed it within one year of election. The chair usually conducts the meetings. Other officers may be a vice chairperson and a secretary. An executive committee consisting of the proper pastor and parish pastoral council officers, through consultation, will propose the agenda for each meeting.

§4. The council's on-going agenda:

- 1° Update written parish mission statement (long term);
- 2° Evaluate and change goals, objectives and priorities in service (short term);
- 3° Review the annual budget and make recommendations to the pastor;
- 4° Promote meaningful dialogue and decision-making among the priests, religious and lay leaders of the parish;
- 5° Identify and encourage the use of gifts and talents of the members of the parish;
- 6° Assess, at least annually, the function and performance of the parish pastoral council itself.

Art. 1010 – PARISH MEMBERSHIP

§1. As a general rule a parish is to be territorial, that is, it embraces all the Christian Faithful within a certain territory; however, personal parishes may be established based on some other determining factor when a genuine spiritual need suggests it (c. 519).

§2. It is recognized that families or individuals may wish, and in reality often do, attend Mass and become actively involved in parishes other than their territorial or personal ones. They are free to do so since they have a right to receive assistance out of the spiritual goods of the Church, especially the word of God and the sacraments (cc. 213; 219; 220; 843, §1). However, their former parish should be informed by the family or individual if the intention is to become completely inactive there.

§3. Primarily, a parish is a definite community of the Christian faithful established on a stable basis within the Diocese; the pastoral care of a parish is entrusted to a pastor as its own shepherd under the authority of the Diocesan Bishop (c. 515, §1). It is within the parish family that the faithful cooperate in the building up of the Body of Christ in accord with each one's own condition and function (c. 208). Here too, they are bound to fulfill with great diligence the duties which they owe to the universal Church and to the Diocese (c. 209, §2).

§4. It is in the parish that they are readied for their right and duty to work so that the divine message of salvation may increasingly reach the whole of humankind (c. 211). In addition, it is here that they fulfill their obligation to assist with the needs of the Church so that the Church has what is necessary for divine worship, for its teaching, for works of the apostolate, justice and charity, and for the decent sustenance of its ministers (c. 222).

§5. Unless they are transients, every member of the Christian faithful has domicile or quasi-domicile in a territorial parish or at least a diocese (cc. 100-106). It follows that they have a proper pastor or the pastor of the territory in which they are staying from whom they have a right to receive the sacraments and other pastoral services of the Church when properly prepared and rightly disposed (cc. 107; 848, §1; 1177, §2). Their rights are never lost by failure to register in, contribute to or participate otherwise in the territorial parish.

§6. In the Diocese when families or individuals register in a parish outside their territory, whether it is a personal one or another territorial one, they acquire all the rights and duties within the chosen parish that are incident to membership in a definite community of the Christian faithful established on a stable basis.

§7. A pastor is to accept the registration of a family or individual only from those for whom there is a founded hope of active and stable membership. The original physical records of these registrations are to be maintained in the parish files henceforth.

§8. Once accepted in accord with this *Diocesan Policy* (or de facto membership in the case of those “transferring” prior to the date of this *Diocesan Policy*) the requisites of permission from the proper pastor for marriage (c. 1115) and information given to the proper pastor for funerals (c.1177, §2) are to be presumed by the pastor of the chosen parish.

§9. No pastor or parish minister is to solicit membership from the parishioners of another territorial or personal parish.

Art. 1015 – THE SACRED LITURGY AND SACRED SPACE

§1. *The Sacred Liturgy: A Guide to Understanding the Mass*, effective April 23, 2006, is by reference a *Diocesan Policy*. It is published separately and is available at [The Sacred Liturgy: A Guide to Understanding the Mass](#).

§2. Pastors are not to move the location of the altars, ambo, presider’s chair, tabernacle, choir area or significant liturgical patrimony as well as make changes in liturgical customs without consulting the Diocesan Bishop.

Art. 1020 – RITES OF CHRISTIAN INITIATION FOR ADULTS AND CHILDREN

§1. The *Rite of Christian Initiation of Adults* and the “National Statutes for the Catechumenate” appended to U.S. editions are to be followed and implemented in letter and spirit without exception. The faculties of priests and deacons of this Diocese make this implementation fully possible in every parish. The following also are enacted for the same purpose and are in addition to norms found elsewhere.

§2. The *RCIA Candidate’s Information Form* for those wishing to join the Church is used to assess a candidate’s marriage and sacrament of initiation needs. It should be completed as soon as an inquirer approaches. If a marriage annulment is needed, the Tribunal must be ap-

proached *immediately*. Remember, those who are in invalid marriages may *not* even to participate in the Rite of Acceptance. By reference, this form is *Diocesan Policy*. See Appendix H.

§3. The names of those received into full communion shall also be recorded in the parish baptismal register with the date and place of the valid non-Catholic baptism noted in the usual place. The fact and date of the reception into full communion, confirmation and marriage (date and spouse) shall also be entered as usual in the record. An appropriate certificate can then be issued. The appropriate information should be entered in the other sacramental registers.

§4. At baptism or reception into full communion, those who have reached the age of reason, which is presumed ordinarily at seven (7) years of age, must be confirmed, participate in the celebration of the Eucharist, and receive Holy Communion immediately after baptism or reception. Priests and deacons have faculties so that this *Diocesan Policy* can be effected. These faculties must be used in favor of those persons for whom they are given since the Christian faithful, who are rightly prepared and disposed and have appropriately asked, have a right to the sacraments as the Church proposes them.

§5. Below the age of reason and older children lacking the use of reason are received into the Catholic Church by the “Rite of Bringing a Baptized Child to the Church,” found in the *Rite of Baptism of Children*. Although this rite is used for the reception of a child of Catholic parents who was baptized in danger of death, it may also be used for the baptized child of a non-Catholic parent who is being received into the Catholic Church and wish to have the child, lacking the use of reason, also received into full communion. Children with the use of reason are received according to the “Rite of Reception into the Full Communion of the Catholic Church.”

§6. If the “Rite of Bringing a Baptized Child to the Church” is unsuitable (e.g. for older persons who lack the use of reason), reception into full communion may also take place validly by a written document or oral declaration of the parent or guardian before the pastor or his delegate attesting that the child is to be raised in the Catholic faith, and the pastor or his delegate recording the fact of reception and the baptismal information in the appropriate register, as above.

§7. The Diocesan Bishop will confirm all adults who were baptized as Catholics in infancy but were not confirmed later. (Priests do not have the faculty to confirm such persons except *in extremis* as provided in canon law or by express permission of the Diocesan Bishop.) Such adults should experience a modified form of the catechumenate community in their preparation. If these same persons have also not received the sacraments of penance and/or communion, this preparation should be part of the same formation experience. Having first received the sacrament of penance, they may receive the other two sacraments. Confirmation need not precede Communion; however, it is preferable, theologically and liturgically, that confirmation be received first. Such persons might receive First Communion on Holy Thursday, but they have no special part in the Easter Vigil.

§8. PREPARATION FOR THE SACRAMENT OF CONFIRMATION OF JUNIORS AND SENIORS ALSO TO BE CONFIRMED BY THE DIOCESAN BISHOP

1° Parish Policy – RCIA Model: Each parish shall have its own written policy for confirmation preparation. Since those who ask have a right to all sacraments when properly prepared and rightly disposed, parish practice cannot unduly or arbitrarily abridge this right. A parish policy must be in accordance with *Diocesan Policy* and universal law. It shall state a definite time for registration, the requirements for entering the preparation process and the length of preparation. The preparation should follow the Rite of Christian Initiation for Adults as a model. This approach emphasizes: (1) the relationship to baptism and the Eucharist; and (2) initiation into the Catholic Christian community.

2° General Norms: Those desiring to be prepared, their parents, and their sponsors shall be made fully aware of what is required to celebrate the sacrament of confirmation.

3° Freely Chosen and Personally Requested: The decision to celebrate confirmation shall be a free choice on the part of each candidate. Candidates must personally request confirmation of their proper pastor. Requirements for confirmation should never be presented as something to “earn” or as “a completion of one’s religious education.”

4° Requirements: The parish is the faith community into which the candidate is seeking to be more fully initiated. Remote preparation for this sacrament begins with baptism and continues through years of catechesis and involvement in the parish community. Candidates must have had several years (more than two (2) years) of catechesis prior to confirmation preparation. There must be evidence that those who are celebrating this sacrament are practicing their faith by regular participation in the Eucharist.

5° Elements of the Process: Proximate and immediate catechesis must take place in the faith community into whose life of prayer and worship a candidate will be more fully initiated. This preparation ordinarily includes ministry involvement (service), a retreat, opportunities to celebrate the sacrament of reconciliation, an interview with the pastor or his delegate and doctrinal instruction. At the discretion of the pastor, catechesis ordinarily includes some components separate from confirmation programs in the Catholic school or parish religious formation program. The catechetical process shall enable the candidate to: (a) articulate some understanding of the role of the Holy Spirit in his/her life; (b) demonstrate some understanding of the sacraments of Initiation; baptism, confirmation and Eucharist; (c) demonstrate involvement in the Catholic community and its mission; and (d) approach the sacrament freely. Several ritual celebrations may mark the movement through the stages of the preparation process using the RCIA as a model.

6° Collaboration: Parishes in the same area may also prepare their candidates collaboratively especially in Catholic high schools or joint parish religious education program. Both those from the Catholic school confirmation program and those in the parish confirmation program should all come together in some common experiences in their own respective parish or mission. The confirmation ritual itself should always be celebrated in each candidate’s parish or mission church.

7° Baptismal Name: The candidate’s baptismal name or given name, even if it is not a saint’s name, may be used as the confirmation name. A new name may also be chosen if the candidate has a special devotion to a saint. Each confirmand is free to choose any one of these possible alternatives.

8° Sponsors: A sponsor must be a fully initiated practicing Catholic. The sponsor may fittingly be one of the baptismal godparent(s). Parents absolutely *cannot* be sponsors for the sacraments of baptism or confirmation. Sponsors may be of either sex and should be willing to have some participation in the preparation and discernment process as determined by the pastor.

9° Discernment: Candidates, parents and sponsors, along with catechetical leaders and parish priests, shall together discern the readiness of a candidate for the celebration of this sacrament. Interviews with candidates, parents and sponsors at particular points throughout the preparation process facilitate such discernment.

10° Confirmation is ordinarily administered to candidates in their *junior or senior* year of high school only.

11° Additional information including models for preparation, celebration and assistance are available through the Diocesan Office of Religious Education.

§9. The *Celebration of Confirmation* by reference is *Diocesan Policy*. See Appendix F.

§10. The *Confirmation Liturgical Planning Sheet*, which is due in the Office of the Bishop two (2) weeks prior to a scheduled confirmation, by reference is *Diocesan Policy*. See Appendix G.

Art. 1025 – BAPTISMAL REGISTRATION AND CERTIFICATION

§1. Guiding Principles: The baptismal register is an historical document that records the facts as they are known and understood at the time of the baptism. When subsequent, additional notations are made as provided herein or other alterations are needed, nothing already written in the register may be obliterated in anyway whatsoever by anyone for any reason. Only additions can be made, not changes that erase something even erroneously recorded. Erroneous information may only have a single, narrow line drawn through it, but it must continue to be legible.

§2. There is no possibility of changing the historical facts such as the godparents at the time of baptism no matter what they have done subsequently. There is no possibility of adding persons as though they were present or acting in roles that they did not have at the time of the baptism.

§3. A *certificate* of baptism is an official document *certifying* what appears in the baptismal register, which is the only official record. The certificate only attests to the fact of baptism of a particular and unique person, not parentage or any other thing. Not everything that is recorded in the register has to appear on the certificate.

§4. At a minimum on the certificate, there must be some version of the person's name, the date of baptism and some other facts that will certainly identify the person in a way that s/he cannot be confused with someone else.

§5. Never shall a baptismal certificate be issued without an indication concerning each marriage of the baptized person (even if a spouse has died) or the words “no notations concerning marriage” (even one given to the parents of an infant). The absence of any notation concerning marriage proves absolutely nothing. A certificate without any notation concerning marriage is *invalid* for use to determine freedom to marry.

§6. Children Who Are Adopted: In accord with the prescriptions of canon 877, §3, the following norms of The United States Conference of Catholic Bishops, having received the *recognitio* of the Holy See, are effective December 1, 2000. They supersede all things to the contrary.

§7. IN THE REGISTER: For children baptized after their adoption is finalized, the following information shall be entered in the register (more is contained in the register than is ever put on the certificate):

- 1° the Christian name(s) of the child as designated by the adoptive parent(s);
the name(s) of the adoptive parent(s);
- 2° the date and place of birth;
- 3° the names of the sponsors selected by the adoptive parent(s);
- 4° the place and date of the baptism;
- 5° the name of the minister performing the baptism; and
- 6° the fact of adoption but *not* the names of the natural parents.

§8. ON THE CERTIFICATE: Baptismal certificates issued by the parish for adopted children will be no different from other baptismal certificates. No mention of the fact of adoption shall be made on the baptismal certificate. Less is put on the certificate than is contained in the register.

§9. A copy of the legal adoption papers shall be kept within the baptismal register if permitted by the adoptive parents. In any case, no additions are to be made to the register unless they are transcribed from the legal adoption papers in hand.

§10. For children baptized before their adoption is finalized, the following notations shall be added to the baptismal register, but only after the adoption has been finalized and with due regard for the civil law of the jurisdiction:

- 1° parentheses shall be placed around the names of the natural parents;
- 2° the name(s) of the adoptive parent(s) shall then be added;
- 3° the child's former surname shall also be parenthesized and the new surname added;
- 4° a notation shall be made that the child was legally adopted.

§11. Baptismal certificates issued by the parish for these individuals shall give only the name(s) of the adoptive parent(s), the child's new legal surname, the date and place of baptism, and the name of the minister who conferred the sacrament. The name(s) of the sponsor(s) shall not be given, and no mention of the fact of adoption shall be made on the baptismal certificate.

§12. A baptismal entry for the adopted child may be made in the baptismal register of the adoptive parents' parish. This second record is permitted for future ease in reference and to afford what may often be the only possibility of reference after the adoption has been finalized. Cite the date and location of the original baptismal record and list only the name of the adoptive parents, and the date and place of birth.

§13. Parish personnel having access to parish registers have an obligation not to disclose to any person any information that would identify, or reveal, directly or indirectly, the fact that a person was adopted.

§14. Sex-Change Surgeries: A question has been posed concerning 'sex change operations' and official parish records. The Congregation for the Doctrine of the Faith has given this response: Official parish books may not be altered for any reason, except to correct errors of transcription. Therefore, even in cases of such operations the records are not to be altered. Specifically, the altered condition of a member of the faithful under civil law does not change one's canonical condition that is male or female as determined at birth. However, should a situation rise in which some sort of notation is determined to be necessary, it is possible, in the margin of the entry for baptism, to note the altered status of the person under civil law. In such case, the date and relevant protocol number of the civil juridic act or document should be included along with, where possible, a copy of the documentation itself at that page of the baptismal registry.

Art. 1030 – ADORATION OF THE BLESSED SACRAMENT

§1. It is desirable, wherever possible, that there would be exposition of the Blessed Sacrament in each church either perpetually, for a length of time each week or once a month.

§2. The Blessed Sacrament can be exposed for the veneration of the faithful, either in the ciborium with the tabernacle door open on the altar, or in the monstrance.

§3. The permission of the Diocesan Bishop is required for perpetual adoration.

§4. It is preferable that this devotional practice takes place in a chapel distinct from the body of the church so as not to interfere with the normal activities of the parish or its daily liturgical celebrations. Where this is not possible, then it may take place in the church.

§5. When Mass is celebrated in the place where the Blessed Sacrament is exposed, the Eucharist must be replaced in the tabernacle before the celebration of Mass begins.

§6. All the liturgical norms given in *Holy Communion and Worship of the Eucharist Outside Mass*, nos. 82-100, are to be followed. Under no circumstances may perpetual exposition take place from the celebration of the Lord's Supper on Holy Thursday until after the Vigil of Easter is celebrated.

§7. There should be a sufficient number of people present for Eucharistic adoration before the Blessed Sacrament is exposed. There must never be periods when the Blessed Sacrament is exposed and there is no one present for adoration.

§8. The local pastor is responsible for seeing that the liturgical norms and diocesan regulations are followed.

§9. A parish association pertaining to the parish in which each approved perpetual adoration chapel is located shall be established. The association's purpose shall be the promotion and organization of adoration so that it is truly perpetual. A constitution that is approved and/or amended only with the consent of the proper pastor shall govern it. Membership and even leadership shall be extended not only to parishioners of the same parish but also to any Catholic who wishes to further the association's purpose in accord with its proper constitution.

Art. 1035 – LITURGY WITH THE BISHOP

The *Liturgy Planning Sheet* by reference is a *Diocesan Policy*. It is due in the Office of the Bishop two (2) weeks prior to all Masses the Diocesan Bishop celebrates. See Appendix I.

Art. 1036 – TIMES OF ORDINATIONS TO THE PRIESTHOOD AND DIACONATE

§1. Ordinations to the priesthood are usually set for the last Saturday in May at 10:00 AM at a location as determined by the Diocesan Bishop.

§2. Ordinations to the diaconate usually take place in the Cathedral on a date and time as determined by the Diocesan Bishop.

Art. 1040 – TIME OF VIGIL MASSES

The Code of Canon Law (c. 1248, §1) concerning the vigil or anticipated Mass states that this liturgy may take place in the evening of the preceding day. In the Diocese of Alexandria, “evening” is to be understood as no earlier than 4:00 P.M.

Art. 1050 – MASS STIPENDS AND OTHER OFFERINGS

§1. MASS STIPENDS: The Mass stipend or the amount of the offering set for the celebration of Mass is \$5.00 (c. 952, §1). There are to be no distinctions as to “kind” of Mass or higher rates for special services. More may be accepted only if it is freely offered. There should be no appearance of commerce concerning Mass stipends (“On Collective Mass Intentions [MI]” February 22, 1991, Art. 3; c. 947). In charity, priests are to celebrate Mass for the intention of the Christian faithful even if no offering has been received (c. 905).

§2. Mass stipends are to be deposited in a parish account. They are to be recorded and reconciled carefully. Any interest earned on an account shall be regularly transferred to the general operation of the parish. A surplus of money after reconciliation in the stipend fund indicates a neglect of pastoral responsibility. Such a surplus must be divided by \$5.00 and the resulting “anonymous intention(s)” sent to the Chancery for distribution to needy priests and the missions. If stipends are less than required for the intentions on hand, the intentions are to be said without stipends.

§3. Long-term (more than one year) or perpetual obligations regarding Mass offerings or intentions are not to be accepted without the written permission of the Diocesan Bishop (cc. 953; 1304, §1).

§4. Except as provided below, only one offering may be accepted for an individual Mass and only one Mass is to be offered for each individual stipend (cc. 948; 950).

§5. A stipend is paid out for a Mass only and to the extent a stipend was received for the intention. No stipend is paid when an intention without offering is received or when there is no specified intention and the priest is free to take his own intention.

§6. Only one stipend is to be taken for one Mass per day by a priest. Stipends for additional Masses during the day are to be disbursed on a regular basis to the Priests’ Retirement Fund (c. 951). Sometimes a lump sum is received and the number of Masses is not specified. The lump sum is to be divided by \$5.00 and a Mass celebrated for each resulting intention. The Diocesan Bishop should be consulted in exceptional cases.

§7. On every Sunday and holy day of obligation a pastor must offer a Mass *pro populo*. Ordinarily, this Mass must be celebrated by the pastor himself within his parish (c. 534). It is illicit to take a stipend for the Mass *pro populo*. When the pastor celebrates a Mass in addition to the Mass *pro populo*, one stipend may be taken for the Sunday or holy day as provided herein.

§8. A “collective Mass intention” is one in which the approved stipend (see #1 above), or more if it is freely offered, is accepted by the celebrant from each donor and the intentions of the several donors are remembered in one (1) Mass according to a “collective” intention with the knowledge and consent of each donor (MI, Art. 2, §1). However, the celebrant may only accept the ordinary stipend as for a Mass for a single intention.

§9. The date, time and place of all such collective Masses must be published and only two (2) such Masses may be celebrated per week per parish. These conditions are necessary to emphasize the *exceptional* nature of the concession made in this decree (MI, Art. 2, §§2-3).

§10. Offerings, traditionally made for a collective Mass intention on All Souls Day or at other such times, shall be treated as stipends. The norms for a collective Mass intention apply.

§11. For such collective Masses, the equivalent of one (1) stipend may be kept by the celebrant and the remainder disbursed on a regular basis to the Priests' Retirement Fund.

§12. There should be a renewed catechesis of the faithful. They are to be taught, “the deep theological meaning of the offering given to the priest for the celebration of the eucharistic sacrifice...the ascetical importance of almsgiving in Christian life, which Jesus himself taught, of which the offering for the celebration of Masses is an outstanding form; the sharing of goods, through which by their offering for Mass intentions the faithful contribute to the support of the sacred ministers and the fulfillment of the church's apostolic activity” (MI, Art. 7).

§13. Priests are reminded of *Presbyterorum Ordinis* from the Second Vatican Council: “Priests, just as bishops, are to use moneys acquired by them on the occasion of their exercise of some ecclesiastical office primarily for their own decent support and the fulfillment of the duties of their state. They should be willing to devote whatever is left over to the good of the church or to works of charity” (PO # 17).

§14. OFFERINGS ON THE OCCASION OF PASTORAL MINISTRY

1° Offerings given to pastors, parochial vicars, deacons or any other minister on the occasion of the performance of some pastoral ministry, often called “stole fees,” are to be placed in the general parish account of the parish in which services are rendered (cc. 1267, §1; 531; 551).

2° The only exception is when the donor has explicitly stated that the gift is to be retained personally by the minister. The presumption is that the gift is for the parish. Therefore, in doubt, the gift is to be placed in the general parish account.

3° Priests should have a special concern that the offering should go for the expenses incurred for the operation of parish facilities (PO # 17).

4° Fees for professional services, such as for musicians are not considered as “stole fees.”

Art. 1060 – Extraordinary Minister of Holy Communion

§1. An extraordinary minister of Holy Communion is a layperson who assists the ordinary minister of the Eucharist, principally in the distribution of Holy Communion. This ministry is more than one of convenience; affirming the dignity and holiness of all the baptized, the extraordinary minister of Holy Communion is a sign that all are called to share the life and sustenance of Christ with each other. Thus, men and women should be chosen for this role to manifest a wide diversity of age, race, economic condition, material status, etc.

§2. In such situations where a need exists for extraordinary ministers of Holy Communion, in addition to the clergy, it shall be the responsibility of the pastor of the parish (and the administrator of an institution) to see to it that provisions are made for additional extraordinary ministers of Holy Communion.

§3. An extraordinary minister of Holy Communion must be nominated by the appropriate pastor or administrator and approved by the Diocesan Bishop for this ministry. The usual term of service for an extraordinary minister of Holy Communion is three years and can be renewed on request by the pastor.

§4. The designation for service as an extraordinary minister of Holy Communion is valid *only* within the parish or institution of appointment.

§5. Special care should be taken in choosing those who minister to the “community in need.” Such a person must be properly instructed for this ministry; should have the Eucharist at the center of his or her faith; should be model of Catholic life to the entire Christian community, and should embody the Christian life of service.

§6. Before an extraordinary minister is appointed or reappointed, the person must attend a training session or workshop provided by the parish or through the diocesan office. Truly exceptional cases may be provided for in other ways approved by the Diocesan Bishop.

§7. The pastor or administrator is responsible for the continued spiritual growth and appreciation of the Eucharist. Periodic or annual “days of renewal” on a parish or inter-parish basis are strongly recommended.

§8. After appointment by the Diocesan Bishop, the extraordinary ministers should be formally commissioned by their pastor (or chaplain) in such a manner that a significant number of the people they serve can witness the rite. Commissioning ceremonies may be celebrated for reappointments. The rite is found in the *Book of Blessings* # 1871-1896.

§9. On special occasions, when there is need for additional extraordinary ministers of Holy Communion, the celebrant may commission suitable persons for that particular occasion. This should be done only by way of exception.

§10. Care should be taken to avoid confusing extraordinary minister of Holy Communion and deacons because of their attire. The proper attire should be in conformity with their state in life; e.g., lay people are to dress as lay people, not in albs or special robes.

§11. Communion ministers may distribute Holy Communion *only* when there are not sufficient ordinary ministers present at the celebration.

§12. At each Mass, enough hosts for all present should be consecrated. Consecrated hosts needed for homebound, hospital patients and nursing home residents and private adoration are secured in the tabernacle. Consecrated wine must be consumed at Mass and may NEVER be reserved in the tabernacle.

§13. Communion is distributed according to the rubrics, among these, note:

1° The priest receives Communion first before it is distributed to the other ministers. The deacon receives next, even before concelebrants, then the Communion ministers and,

finally, the rest of the assembly. Only priests self-communicate; all others, including deacons and extraordinary ministers of Holy Communion receive from another minister.

2° Communion should never be distributed hastily; friendly eye contact, posture and tone of voice should enhance the moment of reception for the communicant. The name of the communicant is not used.

3° The communicant, not the minister, chooses whether to receive Communion in the hand or on the tongue; similarly, when Communion from the cup is offered, the communicant decides whether to receive from it.

4° As a rule, if an extraordinary minister of Holy Communion notices a communicant acting improperly (e.g., being irreverent with the Eucharistic species, “self-intinction,” etc.), he or she should mention this fact to the pastor or chaplain after the celebration for his prudent action.

5° Special care should be taken in the purification of the ciborium, so that fragments are consumed and consecrated hosts do not remain for too long unused and become stale. The reserved consecrated hosts are ordinarily renewed monthly.

§14. Extraordinary ministers should *not* fulfill any other ministries at the Mass at which they distribute Communion (e.g. lectors, ushers, cantors, etc.).

§15. An extraordinary minister is to be present and participate fully at the Mass during which he or she distributes Communion. He or she should be seated in the assembly during the Mass; he or she is not part of the entrance procession. Extraordinary ministers are to move into the sanctuary as soon as they have offered the peace greeting, before the Lamb of God.

§16. The role of the extraordinary minister encompasses the ministry of bringing Holy Communion to the sick and homebound. Ideally, this ministry will be done as an extension of the parochial celebration of Mass, but can be done at other times as well. In this regard:

1° When an extraordinary minister brings Communion to the sick and homebound, the proper, official rite is to be used. When this is done immediately following Mass, at least some public mention of this fact at the conclusion of the Communion Rite of that Mass is encouraged. It is *not* appropriate to bring a pyx simply while coming forward to receive Communion. Whatever is done by way of obtaining and bringing Holy Communion to the sick must be carried out with dignity, decorum and true respect exhibited for the Eucharistic presence.

2° In bringing Communion to the sick and shut-ins within the parish or institution for which they were approved, the extraordinary minister must have at least presumed permission of the pastor or chaplain. No extraordinary minister should bring Communion to persons elsewhere, even to fellow parishioners or family who may be hospitalized, without the expressed permission of his or her own pastor.

3° Extraordinary ministers are to know that they may and, indeed, should offer the Eucharist as Viaticum to those who are dying, using the proper ritual.

4° The Holy Eucharist is to be carried and possessed by an extraordinary minister *only* while bringing Communion to the sick; it may not be reserved outside of a tabernacle overnight or any longer than necessary.

5° If and instituted acolyte, deacon or priest is present, he gives Holy Communion, not the extraordinary minister, to the sick person.

6° In the absence of an ordained minister and with the expressed permission of the pastor, an extraordinary minister of the Eucharist may expose and repose the Blessed Sacrament in either a ciborium or a monstrance for adoration, and may lead the faithful in prayer during this time. In such a case, the official form of the celebration is to be followed, noting that laypersons are not permitted to give the “benediction” in any form as part of the ritual.

Art. 1070 – ALTAR SERVERS/OTHER MINISTERS

§1. Canon 230, §2 states: “Lay people can receive a temporary assignment to the role of lector in liturgical actions. Likewise, all lay people can exercise the roles of commentator, cantor or other such, in accordance with the law.”

The Pontifical Council for the Interpretation of Legislative Texts has stated that liturgical functions, according to the above canon, may be carried out equally by men and women, boys and girls. Although the ministry of instituted acolyte is reserved to lay men, the liturgical functions of these ministers may be carried out by others, regardless of gender.

§2. No distinction should be made between the functions carried out in the sanctuary by men and boys and those carried out by women and girls. The term “altar boys” should be replaced by “servers”. The term “server” should be used for those who carry out the functions of the instituted acolyte.

§3. At the same time, however, it is appropriate to follow the noble tradition of having boys serve at the altar. As is well known, this has also led to a reassuring development of priestly vocations.

§4. Servers should be mature enough to understand their responsibilities and to carry them out well and with appropriate reverence. They must have already received Holy Communion for the first time and they usually receive Holy Communion whenever they participate in the liturgy.

§5. Servers should receive proper formation before they begin their ministry. The formation should include instruction on the Mass and its parts and their meaning, the various objects used in the liturgy (their names and use), and the various functions of the server during the Mass and other liturgical celebrations. Servers should also receive appropriate guidance on maintaining proper decorum and attire when serving Mass and other functions.

§6. Since the role of server is integral to the normal celebration of the Mass, at least one server should assist the priest. On Sundays and other more important occasions, two or more servers should be employed to carry out the various functions normally entrusted to these ministers.

§7. Servers should normally be vested. This is within the tradition of the Church and prevents difficulties regarding appropriate dress for these ministers. The alb is the preferred vestment for servers and *not* the cassock and surplice.

§8. Servers carry the cross, the censer with incense and the processional candles. They hold the book for the priest celebrant when he is not at the altar. They assist him when he receives the gifts from the people. Then they assist him with the bread, wine, and water during the preparation of the gifts and wash the hands of the priest. They assist the priest celebrant and deacon, as necessary, at Mass and during special rites.

§9. Servers respond to the prayers and dialogues of the priest along with the congregation. They also join in singing the hymns and other chants of the liturgy.

§10. Servers should be seated in a place from which they can easily assist the priest celebrant and deacon. The place next to the priest is normally reserved for the deacon if one is present.

§11. Servers may not distribute Holy Communion or fulfill any other liturgical ministry at the Mass they serve except in extreme pastoral necessity.

§12. The “Order for the Blessing of Altar Servers, Sacristans, Musicians, and Ushers” (*Book of Blessings*, # 1847-1870) is encouraged before they begin to function in their ministry.

§13. Members of the same family may be used in various ministries during the celebration of the same Mass.

Art. 1075 – PLACE FOR SACRAMENTAL CONFESSIONS

§1. In accord with the prescriptions of canon 964, §2, the following norm of The United States Conference of Catholic Bishops, having received the *recognitio* of the Holy See, is effective December 1, 2000. It supersedes all things to the contrary.

1° Provision must be made in each church or oratory for a sufficient number of places for sacramental confessions which are clearly visible, truly accessible, and which provide a fixed grille between the penitent and the confessor. Provision should also be made for penitents who wish to confess face-to-face, with due regard for the Authentic Interpretation of canon 964, §2 by the Pontifical Council for the Interpretation of Legislative Texts, 7 July 1998 (AAS 90 [1998] 711).

2° Implementation in the Diocese of Alexandria: The Authentic Interpretation of canon 964, §2 by the Pontifical Council for the Interpretation of Legislative Texts, 7 July 1998 provides for the confessor to determine whether, in a particular instance, he requires a penitent to confess from behind a fixed grille instead of face-to-face. This exception must not be so broadly interpreted as to prohibit all penitents from confessing face-to-face or obviate the need to arrange the place for sacramental confession for face-to-face confession.

Art. 1080 – TERMS OF OFFICE OF PRIESTS

§1. PASTORS

1° The term of office for pastors shall be six (6) years with due regard for the acquired rights of those already in office. All appointments to the office of pastor shall be to this limited term even if the letter of appointment does not so state.

2° Additional six (6) year terms, may be permitted at the discretion of the Diocesan Bishop.

3° Priests who are religious or who are not incardinated in the Diocese of Alexandria may be appointed Pastors for six (6) year terms. Such an appointment does not imply, implicitly or explicitly, any approbation whatsoever regarding incardination.

§2. PAROCHIAL VICARS Ordinarily, parochial vicars serve for no more than three (3) years in any one parish unless permitted at the discretion of the Diocesan Bishop.

§3. RELIGIOUS PRIESTS These same norms shall govern the assignment of religious priests to these offices with due regard for more significant rights in a written agreement between the Diocesan Bishop and a competent religious superior (c. 520, §2). Neither these norms nor a written agreement shall abridge the rights of the Diocesan Bishop or a religious superior according to the norm of canon 682.

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY

§1. Monthly Compensation for Clergy Assigned in the Diocese of Alexandria

FY 2014-2015		
Pastors & Parochial Vicars	Earned Income	\$1,674.00
	Professional Expense Allowance	485.00
	TOTAL COMPENSATION CHECK	\$2,159.00
“Transitional” Deacons	Earned Income	\$751.00
	Professional Expense Allowance	485.00
	TOTAL COMPENSATION CHECK	\$1,236.00

1° Only this Earned Income is recorded in the parish books under chart of account # 6010 (COA #6010).

2° For secular clergy only this annualized amount is to be reported on the W-2 form prepared and distributed by the parish in January each year as provided by the IRS. State and

federal income tax as well as self-employment tax is paid from this or other earned income. The amount of self-employment tax paid should be calculated with the assistance of a tax advisor based on the fair market value of room and board. A clergyman, at the time of disability or retirement shall qualify for and receive a social security income proportionate to the taxes he has paid.

3° Also for secular clergy contributions to a Roth IRA, IRA or other retirement investments granted tax advantages by the government should be made from this or other income.

4° Reimbursement for ministerial (“professional”) expenses other than mileage is paid monthly (COA #6015). This amount is reported by secular priests as a reimbursement on IRS Form 2106; it is not reported on his W-2. If the clergyman received reimbursement in excess of actual ministerial expenses, this excess must be added to the “Wage, salary, tips, etc.” income on Form 1040 and included as income in the calculation of the clergyman’s self-employment tax.

5° Monthly payments are due and payable on or after the twentieth day of the month in which services are rendered. This compensation check shall **not** include other payments.

§2. Incardinated Priests of the Diocese Who Are Assigned in the Diocese: Each such priest is compensated personally and his parish makes payments to the diocesan funds as required in *Diocesan Policy Art. 1108*. No such payments are required for transitional deacons.

§3. Secular Priests Not Incardinated, But Assigned by the Diocesan Bishop of Alexandria: Each such priest is compensated personally and his parish makes payments to the diocesan funds as required in *Diocesan Policy Art. 1108*. A written agreement between the priest and the Diocesan Bishop may provide otherwise.

§4. Priests of Religious Institutes or Societies of Apostolic Life Assigned by the Diocesan Bishop of Alexandria: Each religious order or society of apostolic life is compensated monthly by check made payable to the entity and not to an individual in accord with the written agreement between its major superior and the Diocesan Bishop of Alexandria. The priest’s parish makes payments to the diocesan funds as required in *Diocesan Policy Art. 1108* unless a written agreement between its major superior and the Diocesan Bishop of Alexandria provides otherwise.

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS “Standard Mileage Rate” (55.5¢ per mile as July 1, 2011). To obtain reimbursement for this mileage a written record must be submitted monthly (COA #7021). This amount is also reported by secular priests as a reimbursement on IRS Form 2106; it is NOT reported on his W-2, however.

2° Stipends and stole fees are also earned-income. These amounts are not reported on a priest’s W-2. They are governed in *Diocesan Policy Art. 1050*.

3° Any priest is expected to be out-of-pocket a maximum of \$250.00 per year for covered, in-network prescription and medical expenses. The Diocesan Infirm Priests Fund will reimburse any priest the difference between the amount paid by insurance and the docu-

mented cost paid by the priest for qualified prescription and medical expenses. Application for reimbursement must be made to the Diocesan Insurance Clerk. This reimbursement is not to be reported to the IRS as income to the priest. Prescription and medical expenses that do not qualify as both covered and in-network are not reimbursed by the Diocesan Infirm Priests Fund. The latter are paid by the health insurance carrier according to their reduced coverage schedules and the priest himself is responsible to his medical providers for the remainder owed. There is no reimbursement for medically unnecessary and elective services and procedures; they are to be borne by the priest himself.

4° Prescriptions at age 65 are no longer available through the provider under the health insurance coverage. Priests shall then be reimbursed for sixty percent (60%) of prescription expenses from the beginning of the calendar year until the out-of-pocket limit (see above) is reached. When the out-of-pocket limit is reached, prescription expenses are reimbursed at 100% for the remained of the calendar year. Documented claims for reimbursement, therefore, must be submitted to the Insurance Clerk in the Diocesan Business Office.

5° The Part B or Part D Medicare amounts that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

6° "Rectory Living Expenses" are paid by the parish (COA #7460). If a priest or transitional deacon has paid for these expenses from his own pocket, he is reimbursed only for the documented amounts. ***He must not be provided a fixed, monthly amount for these expenses.*** Housekeepers or cooks may be hired as parish employees if the parish can afford them. A priest receives no additional compensation if he undertakes these or any other duties such as lawn care or janitorial duties himself.

7° Priestly Sabbaticals are paid in accord with that *Diocesan Policy* (Art. 1140). Assignment to study is not a sabbatical.

8° The costs of an annual retreat and for continuing education are paid by the parish only for documented amounts and shall not exceed \$1,000 (COA #7080). Exceptions require the approval of the Diocesan Bishop.

9° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for FY 2011-2012 this amount is \$14,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses

§6. Protection of Compensation

1° Without exception, every priest is to take from the parish the full compensation as provided above. Compensation is treated as an acquired right.

2° Priests, who are unable to compensate themselves fully, must report immediately in writing this fact to the Diocesan Bishop.

§7. VACATION AND THE CLERGY WORK-WEEK

1° Vacation for a priest is four (4) weeks, including three (3) Sundays; they may run continuously. Vacation is defined as being absent from the parish and implies that the priest cannot be called for ministry while away (cc. 533, §2; 550, §3). Vacation time does not ac-

cumulate beyond the current fiscal year. The canonical right to a vacation is not absolute (It is also not properly governed by civil law under which it is a mere gratuity and is not an earned/vested wage, right and/or benefit). When a priest will be absent from his residence for more than 48 hours, 2° or 3° below apply.

2° In a parish with a single priest (pastor or administrator), he must secure a priest to celebrate weekend Masses, provide for other scheduled sacramental needs and a plan of action in case of emergencies and funerals. These arrangements must be made known to the proper Dean or in the case of a dean, to the Vicar General. A secretary or someone known to other parishioners as a contact must also know how to implement the plan of action for emergencies and funerals.

3° In a parish in which two or more priests reside, the pastor (administrator) must approve the vacation schedule. The pastor reports his planned absences to the other priest(s) and he/they must report to him and receive his approval in advance.

4° The priest is one called by the Church and committed to a life of ministry. The number of hours he ministers is determined by the needs of the people he serves and the nature of his particular assignment, not by the clock or calendar. Priestly ministry is clearly more than a job; it is a vocation.

5° The priest's time must be allocated to include the celebration of Sunday and weekday Masses, the administration of the sacraments, prayer, especially the obligation of praying the Liturgy of the Hours, visitation, teaching, counseling, homily preparation, studying, administration and other forms of ministry. It is equally appropriate that he take time for exercise, and sustained periods of rest and leisure.

6° In addition to the period of vacation mentioned above, a priest is entitled to one day off (24 continuous hours) per week. This time may or may not involve absence from the parish. However, a fixed day is not guaranteed because the needs of the people may require a priest's presence and ministry takes precedence. The legitimate expectation of the laity or the pastor, in the case of a parochial vicar, is primary. It is not ordinarily permitted to accumulate days off for extended absences from the place of assignment. When a priest takes a day off, 7° or 8° below apply so the priest can be called for necessary ministry. It is strongly encouraged that a priest have a cell phone or the equivalent in his possession at all times.

7° In a parish with a single priest (pastor or administrator), a secretary or someone known to other parishioners as a contact must also know how to reach the priest.

8° In a parish in which two or more priests reside, the pastor (administrator) approves the daily schedule. Communication among those sharing a parish of assignment is expected and necessary. Each one must know how to contact those who share a common ministry.

9° Exceptions to these provisions must be requested of the Diocesan Bishop in writing at least one week in advance, except in cases of genuine emergencies, and require approval from the Diocesan Bishop.

§8. SUPPLY COVERAGE

1° Priests who "supply coverage" for Mass are those who are not assigned canonically or "in residence" in, or otherwise assigned to the parish (school, diocesan ministry or institution) in question. There is no compensation paid by the parish for celebrating other sacraments.

2° A parish pays for coverage when those who usually celebrate any Mass (weekday or day of precept) are absent for the permitted time of vacation, illness or church related business (including retreat and continuing formation). There is no requirement for provision of daily Mass. The priest himself pays coverage when personal reasons require his absence beyond those times noted above. For example, a priest pays the one who supplies for him when he has a wedding in another place (and he is not on vacation legitimately; a parochial vicar requires the approval of the pastor).

3° At the discretion of the pastor, there is no obligation to provide coverage for a weekday Mass. In any case, however, the responsibility for obtaining coverage is that of the priest who will be absent (in the case of a parochial vicar, with the approval of the pastor) unless it is a case of sudden illness.

4° The honorarium to be offered is \$40.00 per Mass. Additionally, Mass stipends are paid in accord with *Diocesan Policy* Art. 1050 and is earned income. Earned income must be added to the “Wage, salary, tips, etc.” income on Form 1040 and included as income in the calculation of the priest’s self-employment tax. If a priest receives honoraria totaling \$600.00 or more in a calendar year from a parish, IRS Form 1099 is issued. Travel is also paid at the current rate (see above). Additionally, food and lodging for the period of coverage may be offered by the parish.

5° No additional gifts are to be made for supplying coverage.

6° Certain amounts herein may be increased yearly based on the CPI as approved by the Diocesan Bishop.

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS

§1. Monthly Compensation for Retired Priests

Monthly Compensation for Retired Priests Is on Parity with Pastors and Parochial Vicars. It is divided as follows:

FY 2014-2015	
Retirement Benefit	\$ 550.00
Housing Allowance	1,609.00
TOTAL MONTHLY COMPENSATION CHECK	\$2,159.00

1° At 70 years of age, a priest may submit his resignation and request for retirement to the Diocesan Bishop. Retirement is not effective until accepted by the Diocesan Bishop.

2° A portion of the monthly total is designated as a housing allowance. This allowance is not taxable for Federal Income Tax or Social Security purposes to the extent that it is

actually spent in the course of the calendar year for direct housing expenses (e.g., rent, mortgage note, repairs, renovations, property taxes, utilities or insurance).

3° The total amount will be increased yearly until parity is achieved with those in active ministry.

§2. Other Payments to or for a Retired and Unassigned Priest

1° Any priest is expected to be out-of-pocket a maximum of \$250.00 per year for covered prescription and medical expenses. The Diocesan Infirm Priests Fund will reimburse any priest the difference between the amount paid by insurance and the documented cost paid by the priest for qualified prescription and medical expenses. Application for reimbursement must be made to the Diocesan Insurance Clerk. This reimbursement is not to be reported to the IRS as income to the priest. Prescription and medical expenses that do not qualify as both covered and in-network are not reimbursed by the Diocesan Infirm Priests Fund. The latter are paid by the health insurance carrier according to their reduced coverage schedules and the priest himself is responsible to his medical providers for the remainder owed. There is no reimbursement for medically unnecessary and elective services and procedures; they are to be borne by the priest himself.

2° Retired priests shall also be reimbursed for sixty percent (60%) of prescription expenses from the beginning of the calendar year until the out-of-pocket limit (see above) is reached. When the out-of-pocket limit is reached, prescription expenses are reimbursed at 100% for the remainder of the calendar year. Documented claims for reimbursement must be submitted to the Insurance Clerk in the Diocesan Business Office.

3° The Part B or Part D Medicare amount that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

4° The costs of an annual retreat and continuing education are paid by the Diocese only for documented amounts and shall not exceed \$1,000.

5° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for FY 2011-2012 this amount is \$14,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses.

§3 Presumptions Concerning a Priest's Personal Resources at Retirement: It is presumed that a priest has paid into Social Security so that he has some benefits and has personal savings so that he is not totally dependent upon retirement payments from the Diocese.

§4 Certain amounts herein may be increased yearly based on the CPI as approved by the Diocesan Bishop.

Art. 1108 – PARISH ASSESSMENTS FOR THE BENEFIT OF PRIESTS

§1. Monthly Assessments as Invoiced by the Diocesan Business Office:

FY 2014-2015	
Infirmed Priests Fund	\$ 150.00
Retired Priests Fund	325.00
Burial Fund for Priests	\$25.00
TOTAL CHECK	\$ 500.00

1° These amounts are owed for *each priest* assigned to a parish. This fee is a per capita assessment for current expenses and not a contribution for future benefit. Thus, it is paid on each assigned secular and religious priest to the Diocese for its use unless prior written agreement with the Diocesan Bishop provides otherwise.

2° The monthly Infirmed Priests Fund payment is recorded under COA #6215.

3° The monthly Retired Priests Fund payment is recorded under COA #6310.

4° The monthly Burial Fund for Priests payment is recorded under COA #6210.

§2. To defray these expenses Special Collections are authorized to be taken annually for each Fund.

1° The Infirmed Priests Collection is taken on Easter. These contributions are recorded as non-taxable income (COA # 4625).

2° The Retired Priests Collection is taken on the first Sunday in November. These contributions are recorded as non-taxable income (COA # 4650).

3° The full amount of each collection is retained by the parish even if it is in excess of funds owed to the Diocese.

§3. Certain amounts herein may be increased yearly based on the CPI as approved by the Diocesan Bishop.

Art. 1109 – CLERICAL LEAVE OF ABSENCE

§1. A secular priest incardinated into the Diocese of Alexandria, if granted or placed on a legitimate leave of absence from active ministry or other assignment by the Diocesan Bishop for reasons other than poor health:

1° Shall continue to receive a salary for three months;

2° Shall continue to be enrolled in and covered by the diocesan health insurance plan for three months; and

3° Shall continue to have the usual monthly payments made to the Diocese by the parish for retirement, infirmity and funeral funds.

§2. **Source of Funds:** If such a priest is to return to his previous assignment, these payments shall be made by this parish, institution, or diocesan department; if not, these payments will be made by the Diocesan Finance Office.

§3. Continuance of Coverage: After this initial period of three months, a secular priest on a legitimate leave of absence from active ministry or other assignment may maintain his coverage in the diocesan health insurance plan. In addition, he may continue to contribute into the retirement, infirm and funeral funds for his benefit by making equivalent payments for these purposes as directed by the Diocesan Finance Office.

§4. Leave of Absence: Under usual circumstances, a secular priest granted or placed on a “leave of absence” from ministry shall continue to receive his full salary and to be covered by the diocesan health insurance plan, as well as continue to have the usual monthly payments made to the Diocese by the parish for retirement, infirmity and funeral funds. The specifics of any “leave of absence,” which is never foreseen to be a permanent situation, however are always to be carefully spelled out in writing by the Diocesan Bishop or his delegate at the beginning of the time of leave.

§5. Contact with Chancery: A secular priest on any “leave of absence” or other legitimate leave of absence from active ministry or other assignment is to keep the Chancery informed as to his whereabouts.

§6. Religious Priests: A religious priest on a “leave of absence” or other legitimate leave of absence from active ministry is not accorded any continued payments of salary, expense reimbursement, pension or insurance premiums, etc., out of parish, institutional, or departmental funds. Support of this kind is understood to be the responsibility of his religious superior.

§7 Public Presentation: Unless other provision is specifically approved by the Diocesan Bishop, any priest on a leave of absence from active ministry is enjoined not to exercise publicly any priestly ministry or faculties while on leave. The secular priest on a leave of absence from active ministry is expected to avoid giving scandal or causing undue *admiratio* among the faithful. He is also enjoined not to wear clerical dress or otherwise represent himself as a cleric.

Art. 1110 – COMPENSATION AND BENEFITS FOR SEMINARIANS

1° Seminarians assigned to a parish for pastoral experience receive a stipend of 70% of the total amount paid to transitional deacons (see *Diocesan Policy* Art. 1100, § 1). Monthly payments are due and payable on or after the twentieth day of the month in which services are rendered (COA #6030). This compensation check shall not include other payments.

2° They are also entitled to the same *Mileage Reimbursement* (COA #7021) and *Room and Board* (COA #7460) as transitional deacons. With respect to State and Federal taxes, they are treated as any lay employee (COA #6130).

Art. 1115 – CLERICAL ATTIRE

§1. In accord with the prescriptions of canon 284, decreed without prejudice to the provisions of canon 288, clerics are to dress in conformity with their sacred calling. Seminarians who are not clerics do *not* wear clerical attire (e.g. roman collar with a cassock).

§2. In liturgical rites, clerics shall wear the vesture prescribed in the proper liturgical books. Outside liturgical functions, a black suit and Roman collar are the usual attire for priests and transitional deacons. The use of the cassock is at the discretion of the cleric.

§3. Permanent deacons do not ordinarily wear clerical attire, e.g. a Roman collar. Their proper title in Church affairs is “Reverend Mr. N.N.” and they are addressed as “Deacon N.N.”

§4. In the case of religious clerics, the determinations of their proper institutes or societies are to be observed with regard to wearing the religious habit.

Art. 1120 – PERMANENT DEACONS

§1. The *Diocesan Policy* that follows outlines the role, functions, responsibilities, and privileges of permanent deacons and the systems in which they minister and receive support. This *Diocesan Policy* is in harmony with the *Faculties of Deacons*.

§2. The letter of appointment from the Diocesan Bishop and a written position description and service agreement from the pastor further specify what and how a deacon, as a member of the clergy, fulfills his ministry.

§3. The *Diocesan Policy* pertaining to permanent deacons in this Diocese shall be in accordance with the prescriptions of the Code of Canon Law (c. 1009) and the *National Directory for the Formation, Ministry and Life of Permanent Deacons in the Untied States*.

§4. Written policies, guidelines, procedures and position descriptions are to be developed and maintained on a regular and orderly basis for the permanent diaconate.

§5. A Director of Deacon Personnel is appointed by the Diocesan Bishop for a term of three years (3), renewable, for the purpose of serving the permanent deacons in their continuing formation and development, in gathering them, in facilitating communications, and in serving as an advocate and spokesperson.

§6. In order for men to be eligible to serve in the ministerial role of deacon, he must be at least 35 years of age at the time of ordination. In addition, they must demonstrate personal spiritual growth, excellent Christian commitment, personal integrity, and obedience to the Church, proven maturity, leadership and good management of personal finances. They must have a good family life and have acceptance among their peers. It is expected that the wife of the married candidates substantially participate in the formation process.

§7. The Diocese shall maintain adequate programs of recruitment, candidate screening, and evaluations for a permanent deacon-training program. Appropriate advisory structures shall be established to screen potential candidates, supervise a formation program, evaluate candidates, propose them for ordination, evaluate outcomes and review recommendations for assignment of the newly ordained.

§8. An ordained permanent deacon's pastoral assignment by the Diocesan Bishop shall be made after consultation with the dean, the pastor, the Director of Deacon Personnel, and the deacon.

§9. Permanent deacons shall have their interests represented on the Continuing Formation of the Clergy Committee.

§10. Permanent Deacons are to abide by the *Diocesan Policy* for clergy except as outlined in this *Diocesan Policy* for permanent deacons and his letter of appointment.

§11. Permanent Deacons who serve in the Diocese must have completed the academic program approved for deacons, and have had adequate evaluation, pastoral training and spiritual formation.

§12. A written job description for the permanent deacon shall specify the functions, responsibilities and relationships that he will enjoy and for which he is responsible in his pastoral assignment.

§13. Every permanent deacon is to have a written service agreement in which is specified the term of the assignment, accountability, if any benefits are to be paid, etc.

§14. The Director of Deacon Personnel has the responsibility of providing supervision on a periodic basis; a pastor of the parish in which a Deacon serves, or a director of a special program, is to provide supervision on a continuing basis.

§15. Quarterly evaluation is to be conducted in the first year of ordination. After the first year, evaluations should take place once a year. Written evaluations are completed by both the pastor/supervisor and the permanent deacon. All evaluations are to be signed by the party who has written it and signed to indicate that it has been read, although not necessarily accepted, by the other party. Responses to the evaluation may be added by either party.

§16. All evaluations are to be sent to the Director of Deacon Personnel.

§17. The Diocesan Bishop, personally or through another, is also to receive a copy of the evaluations and may at his discretion, conduct a personal evaluation of each permanent deacon.

§18. The term of pastoral assignment is three (3) years and may be renewed at the option of the parties concerned and with the approval and reassignment by the Diocesan Bishop.

§19. The fostering of the continuing formation of permanent deacons is the responsibility of the Director of Deacon Personnel. The permanent deacon himself, the pastor and the Director of Deacon Personnel are all responsible, in part, for the growth and development of the deacon in ministry. Reasonable costs are paid by the parish or employing organization.

§20. The wives of permanent deacons are expected to participate in the program of continuing development with their husbands. Reasonable costs are paid by the parish or employing organization.

§21. Ordinarily a permanent deacon is not provided earned income or ministerial reimbursement as compensation. Nor is he ordinarily furnished room and board.

§22. If compensation is permitted, the Diocesan Bishop shall direct the parish or employing organization the amount to pay the permanent deacon in the letter of appointment.

1° The earned income and ministerial reimbursement compensation to be paid a permanent deacon in full-time ministry shall be at least that of a parochial vicar and is negotiable above this minimum.

2° Diocesan hospitalization and life insurance premiums are paid in full for the deacon personally who is in ministry on a full-time basis. In such cases, a deacon's spouse and dependents may participate in the diocesan plan for lay employees at their own expense.

3° The Diocesan Lay Retirement Program shall be made available to permanent deacons in compensated, full-time ministry.

§23. The parish shall assume costs of an annual retreat, continuing education costs, and reimbursements for automobile mileage expended in ministry at the approved diocesan rate (See Compensation and Benefits of Priests, *DP* Art. 1100).

§24. Voluntary offerings or stipends given to a permanent deacon are presumed to be given to the parish. Only gifts given clearly for his personal use may be retained by him.

§25. A parish is expected to supply the ritual books and other books and supplies necessary for ministry and continuing formation. At least one set of vestments appropriate for the permanent deacon(s) is also to be provided at the parish of assignment.

§26. The expected number of hours spent in ministry for a deacon in part-time service will be specified in the letter of appointment. Reasonable vacation periods are permitted.

§27. In accord with their faculties (c. 757) permanent deacons serve the People of God in the ministry of the Word, in Communion with the Diocesan Bishop and his presbyters.

§28. As clerics, permanent deacons need permission of the Diocesan Bishop to write articles in periodicals, and they must observe the statutes of the Episcopal Conference regarding participation in radio and television programs that treat questions of Catholic doctrine and morals (c. 831).

§29. A permanent deacon is required to wear liturgical vestments while ministering at the Eucharist (c. 929). A deacon is not to recite prayers proper to the priest, especially the Eucharistic Prayer, nor perform liturgical actions proper to a priest (c. 943). He wears the liturgical garb specified for a deacon in the liturgical books for various rites and liturgical celebrations.

§30. Permanent deacons are to resemble the lay faithful in dress and manner of lifestyle. In all forms of address permanent deacons, the appropriate title is “Deacon” according to the Congregation for the Clergy.

§31. A permanent deacon may not present his name for election to any public office or in any other general election, or accept a nomination or appointment to public office, without the prior, written permission of the Diocesan Bishop. A permanent deacon may not actively and publicly participate in political campaigns without the prior written permission of the Diocesan Bishop.

§32. Deacons may enter business, join political parties, labor unions, etc., and are encouraged to be active in community and civic affairs observing *Diocesan Policy* on political activity.

§33. Permanent deacons are required to include as part of their daily prayer those parts of the *Liturgy of Hours* known as Morning and Evening Prayer. Permanent deacons are obliged to pray for the universal Church. Whenever possible, they should lead these prayers with the community to whom they have been assigned to minister.

§34. A permanent deacon ordinarily remains in his lay profession on a full-time basis. Full-time, paid ministry as a permanent deacon may be considered by the Diocesan Bishop in individual cases after consultation with the Director of Deacon Personnel. There are also permanent deacons in the employ of Catholic institutions, but ordination is not a requisite or condition for employment. In the former case, a letter of appointment by the Diocesan Bishop is required. In the latter situation, a permanent deacon is treated in law and fact as any layperson.

§35. The incardination of a permanent deacon into another diocese is to be in accordance with Canon 267 and the other relevant canons.

Art. 1140 – CONTINUING FORMATION OF THE CLERGY

§1. INTRODUCTION

1° The clergy (deacons and priests) are ordained to serve the people of God. It follows from this that clergy have a right as well as an obligation to take advantage of opportunities that will help them to grow in their ability to fulfill this mission. United States Conference of Catholic Bishops

2° 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).

§2. Continuing formation is seen 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.

§3 Of these areas of the clergy's life, spirituality is at the center of growth for clergy. An examination of one's theology, understanding of Church and ministry is essential. Clergy, as 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 formation. Besides the personal development of the clergy, the faithful have a right to the best service clergy can offer.

§4. In today's pluralistic and diverse society it is all the more imperative that the clergy engage in personal and group study of newly generated knowledge and pastoral skills which will improve their ministry. Continuing formation is a lifelong endeavor.

§5. CONTINUING FORMATION: DEFINITION: The term continuing formation means any learning after ordination, including growth, internal (spiritual, social, psychological) and external (cultural changes, theological disciplines and pastoral skills).

§6. SPIRITUAL GROWTH: The spiritual development of the clergy is part of their continuing formation. This growth is a daily process. Therefore, this *Diocesan Policy* deals with instruments of one's spiritual growth, retreats, prayer days, support groups and spiritual direction.

§7. *Retreats:* The Gospel attests to the fact that Jesus and his Apostles took time for themselves. So too, the tradition attests to the need for a time set apart for spiritual renewal and growth. For these reasons, the *Diocesan Policy* regarding retreats is as follows:

1° The Diocese will provide an annual retreat in common for its diocesan clergy at Maryhill Renewal Center.

2° The Committee for Continuing Formation of the Clergy is responsible for this retreat and is charged with searching for and recommending a retreat master to be approved and invited by the Diocesan Bishop. With the Diocesan Bishop the Committee schedules the retreat. Efforts are made to provide different types of retreats within the group retreat format. Clergy are informed in advance of the theme, schedule and basic elements of each retreat.

3° Religious clergy in diocesan ministry are invited and encouraged to make that retreat with their diocesan brothers.

4° The institution of assignment will pay all costs related to a diocesan clergy retreat as explained above. Retired clergy are guests of the Diocese.

5° All clergy are required to make a retreat each year. In odd numbered years, the diocesan clergy retreat in common is the norm. In even numbered years, an individual may make either the diocesan retreat in common or another retreat of his choice.

6° Clergy making a retreat other than the diocesan one shall inform the Diocesan Bishop or Vicar for Clergy of the place and dates of the retreat. Permission is not required, only notification. The institution of assignment shall pay no more than the cost for the diocesan retreat in common for the retreat chosen by a priest as explained above.

7° Clergy wishing to be excused from an annual retreat must make a written request to the Diocesan Bishop. Since deacons are also subject to this *Diocesan Policy*, other arrangements because of job and family responsibilities may always be made with the written permission of the Diocesan Bishop.

§8. *Days of Prayer:* All clergy are encouraged throughout the year to make “days of prayer.” These days may be made in a group or privately. These days shall be arranged by the Committee for Continuing Formation of the Clergy and scheduled according to the needs of both priests and deacons.

§9. *Clergy Support Groups:* Such groups may be a source of spiritual growth. The committee shall develop ways to facilitate and encourage clergy participation. Such support groups, through volunteers, are encouraged for deacons and priests.

§10. *Spiritual Direction:* Because clergy are spiritual leaders in their communities, it is important that they become competent as spiritual directors. They are urged to be in direction themselves for their own spiritual growth. Discernment in prayer and decision-making are important skills for pastoral ministry.

§11. *Clergy Conference and Holy Hour:* Clergy are expected to attend all scheduled Clergy Conferences and Holy Hours. Exceptions for deacons who have job and family responsibilities shall be made by the Diocesan Bishop in writing.

§12. **WORKSHOPS AND SEMINARS:** Clergy are encouraged to take advantage of the opportunities to continue their education through independent study, reading programs, audio and video tapes, seminars, workshops and formal courses. The Diocese has the responsibility to support and encourage participation in educational activities pertaining to ministry. Opportunities are provided annually to each priest and deacon.

§13. Clergy of the Diocese are encouraged to attend workshops and seminars related to their ministry. Therefore, Clergy are permitted one week of continuing education time per year in addition to their vacation.

§14. In addition to the annual retreat costs, each member of the clergy of the Diocese is authorized to obtain from parish or diocesan funds the cost of one (1), seven (7) day program (including transportation and per diem) per year to avail himself of continuing education opportunities. (See *Diocesan Policy* Art. 1100, §5, 8° for limitation on expenditures of institutional funds.)

§15. When parish or Diocese pays for attendance at a workshop or seminar, the participant shall make a detailed report to the Vicar for Clergy including expenses incurred, location, description and personal evaluation.

§16. The Committee for Continuing Formation of Clergy shall develop models for special needs: internship for newly ordained, orientation programs for new pastors and international priests in addition to pre-retirement and retirement sessions for those completing their active ministry.

§17. ACCOUNTABILITY: At times the Diocesan Bishop may require the participation of all clergy at a specific program or event.

§18. Clergy should give an annual account of their professional formation. Twenty (20) continuing formation hours per year is the minimum recommended norm for those working in the Diocese. This time does not include the annual retreat.

§19. SABBATICALS: Sabbaticals range from three (3) consecutive months to one (1) year in length and are for personal and professional study and prayer. Degree programs and other assignments to study are not considered sabbaticals.

§20. *Procedure:* Requests for sabbaticals are made through the Vicar for Clergy to the Diocesan Bishop:

1° The applicant shall state in writing the purpose of the sabbatical, its relationship to his personal and spiritual growth, its value to his ministry, its costs, location and length.

2° Application should be made by January 20 for sabbaticals for the following fiscal year (July 1 - June 30).

3° The Diocesan Bishop refers all applications to the Committee for Continuing Formation of the Clergy who will make their recommendations to him by February 15.

4° The Diocesan Bishop will notify the applicant of his decision, concerning the request for a sabbatical by February 25.

5° Each cleric himself will then be responsible for identifying clerics for coverage and outlining these and other necessary plans for the smooth functioning of the parish or institution while he is on sabbatical. These plans are to be submitted for approval to the Diocesan Bishop by March 20.

6° Once all arrangements for coverage are finalized and approved, the Diocesan Bishop shall inform the cleric's parish or institution of assignment concerning its responsibility for partially financing the sabbatical and the provisions for the parish in the cleric's absence.

§21. Criteria for a positive recommendation are as follows:

1° Years of service to the Diocese by the applicant

2° Quality of the program

3° Degree of usefulness to the individual or to the pastoral ministry of the Diocese

§22. Financing the cost of the sabbatical program itself and replacement personnel will conform to the following pattern subject to the approval of the Diocesan Bishop:

1° The cost of the sabbatical will be shared by the Diocese, the applicant and parish or institution of assignment. Ordinarily, the Diocese will pay one-half of the required fees and travel. Requests for payment are made to the Director of Continuing Formation *after* permission for the sabbatical has been granted by the Diocesan Bishop.

2° The parish or institution of assignment will pay one-fourth of the required fees and travel expenses and continue full compensation and benefit payments for the maximum period of one (1) year. In the case of the sabbatical occurring *between* assignments, the *last place* of assignment will pay the institutional portion of the costs. The parish will also be expected to pay for the replacement cleric if such replacement is necessary. Should these financial responsibilities present a considerable hardship to the parish, the matter will be resolved by the Diocesan Bishop.

3° The applicant will ordinarily be expected to pay the other fourth of the required fees and travel expenses. He shall also be responsible for all other costs incidental to the sabbatical.

§23. Eligibility: Clerics after seven (7) years of service in this Diocese, and multiples thereof, may apply for a sabbatical leave. It is a true sabbatical and not a leave of absence. After twenty-five (25) years of service in this Diocese, a cleric is encouraged to take a full, three-month sabbatical. Priority will be given to this request and special arrangements for financing and replacements during the sabbatical will be considered if necessary.

§24. Evaluation: At the conclusion of the sabbatical, an evaluation shall be sent to the Vicar for Clergy who, after review, will forward it with comments to the Diocesan Bishop.

Art. 1160 – CHEMICAL DEPENDENCY IN THE CLERGY

§1. Chemical dependency (a term used for all mood-altering chemicals, not merely alcoholism and drug addiction) constitutes one of the most serious problems facing our nation, our Church and our families today. Chemical dependency, like other illnesses or diseases, is no respecter of person. No element of society can claim immunity from it. The Church, therefore, recognizes that it has an obligation in both justice and charity to provide assistance and care to its clergy who suffer from this illness in an intelligent and compassionate manner. The Church ministers to its chemically dependent clergy in a way similar to its ministry to other chemically dependent persons.

§2. The following factors are recognized:

1° Chemical dependency is a disease, attacking the whole person, body, mind and spirit as evidenced for example by those who suffer from alcoholism and drug abuse. Its nature as a disease has been well substantiated by sound medical evidence. It is *Diocesan Policy* to address the disease of chemical dependency with love, care and concern for the whole person.

2° Chemical dependency is a progressive disease; it becomes worse as is evidenced by its progressive impairment of body, mind and spirit. If it is not addressed and treated it can result in death or irreparable damage. It is a disease and *not* a moral disorder. Therefore, it is *Diocesan Policy* to direct its efforts towards the proper understanding of this condition by seeking professional help for those afflicted, and not towards those remedies that are designed primarily for sin or penal offense.

3° Since the chemically dependent are often incapable of recognizing their addiction or helping themselves, the procedure outlined in Appendix E is also *Diocesan Policy*.

Art. 1170 – CREMATION

§1. The Funeral Liturgy in the presence of the cremains of the deceased person is permitted. The Appendix “Cremation,” effective November 2, 1997, from the *Order of Christian Funerals* is to be followed in all of its elements.

§2. The faithful are to be taught that the cremains should be buried in a grave in a cemetery or entombed in a mausoleum, columbarium or the sea. They should be especially warned that the practice of scattering cremains on the water, from the air, or on the ground, and keeping cremains in the home are not the reverent disposition that the Church requires (*Order of Christian Funerals*, #417).

1° They should be cautioned about burial in locations other than the legitimate one mentioned above since the cremains might be disturbed at some future date.

2° It should be made clear that by state law cremation is the final disposition of the body. Cremains have no protection under state law as do the bodies of the deceased.

§3. When the teaching of the Church is not heeded in regard to the disposition of the cremains, the Funeral Liturgy is to be celebrated and the alternate form of dismissal is to be used (*Order of Christian Funerals*, #437). A Funeral Liturgy is to be denied only if it is certain that cremation or the means of disposition have been chosen for reasons that are contrary to Christian teaching about the resurrection (c. 1176, § 3).

Art. 1180 – MARRIAGE PREPARATION

§1. For marriage preparation guidelines contact the Tribunal office.

§2. The current forms for marriage preparation, investigations, dispensations, etc. are also available on the diocesan website. Click on “[Download Documents](#)” from the Home and most other pages. The use of current forms is mandatory. By reference, the forms and their attendant instructions are *Diocesan Policy*.

§3. The United States Conference of Catholic Bishops has not issued norms regarding the promise of marriage as mentioned in canon 1062, §1, without prejudice, however, to the prescriptions of canon 1062, §2, regarding an action for reparation of damages. Therefore, clerics, at their discretion *may* publicize (or announce the “banns”) of *any* approaching, presumably valid marriage of at least one Catholic, even one dispensed from canonical form. However, banns are not required.

§4. MARRIAGE CEREMONIES: Each pastor is responsible for formulating sacramental guidelines in his own parish. He should take full responsibility for the enforcement of those guidelines or for any exceptions to those guidelines.

§5. Each parish should have a clear set of written guidelines for marriages that would be available for couples preparing for marriage in that parish.

§6. These parish guidelines shall be in accord with *Diocesan Policy* and clearly express in a positive way the parish's regulations. Saturday evening weddings (Saturday evening and Sunday weddings are NOT prohibited by universal law or diocesan policies), marriage by outside clergy, particular recommendations regarding sanctuary usage, flowers, photographers, music, attendants, instructions for interfaith marriages regarding Communion and participation of ministers of other denominations or faiths, and any other pertinent matters should be included.

§7. Marriages will take place inside a church building. Other "romantic" locations are not permitted. Permission will not be given for exceptions.

§8. EPISCOPAL-ROMAN CATHOLIC MARRIAGES: The *Joint Episcopal-Roman Catholic Statement* is published separately and is available from the Tribunal [Joint Episcopalian-Roman Catholic Statement](#). By reference, it is a *Diocesan Policy*. Episcopalian always are to marry Catholics outside of Mass. Holy Communion is NEVER administered; an Episcopal minister is not to bring his church's communion for anyone.

§9. MARRIAGE INVOLVING OTHER CHURCHES AND THE NON-BAPTIZED:

Baptized non-Catholics and non-baptized persons may or may not wish to have a Mass as part of the wedding. The norm, however, is that the rite of marriage is NOT celebrated within Mass when Catholics marry validly baptized non-Catholics. Mass is NEVER PERMITTED at all on the occasion of a natural (non-sacramental) marriage between a Catholic and an invalidly baptized or non-baptized person.

1° Validly baptized non-Catholics, usually only the Orthodox, may receive the Communion in accord with Canon 844. In this case, the Tribunal must be consulted before permission is granted.

2° When Mass is not celebrated, Holy Communion may never be distributed to anyone.

§10. STATE LICENSES: The Roman Catholic Church teaches that marriage is a life-long commitment and requires spouses to accept this commitment as binding in conscience.

§11. Catholic clergy are to accept either the covenant or the standard Louisiana State marriage license for the celebration of weddings.

§12. If a couple seeking marriage in the Catholic Church chooses the covenant civil marriage license, the preparation already mandated by the Church, both universal and diocesan, fulfills the state requirements for clergy accepting such a license. If a couple chooses the standard marriage license, this choice should in no way be interpreted as diminishing their total commitment to a permanent union as required by the teaching of Christ and His Church.

§13. The Catholic policy of marriage preparation has not changed. Catholic ministers offering premarital instruction in the name of the Church are to continue the marriage preparation program currently being used. Regardless of the choice of Louisiana marriage license, couples are to participate in the usual Catholic marriage preparation.

§14. In view of the Louisiana State Covenant Marriage Act, when a couple chooses the covenant marriage option, the Catholic priest or deacon providing premarital instruction may sign the required attestation. According to this law, only a priest or deacon may sign this attestation. It may not be signed by other Catholic ministers assisting them.

Art. 1185 – NOTIFICATION OF MARRIAGE AND DEATH

§1. After a marriage recognized by the Church, please use the [Notification of Matrimony](#) form to communicate with the Office of the Bishop found in Appendix J.

§2. When a parish receives the news of death, please use the [Notification of Death](#) form to communicate with the Office of the Bishop found in Appendix K.

§3. Forms can be mailed to Office of the Bishop, P.O. Box 7417, Alexandria, LA 71306-0417; faxed to 318-767-1230; all the elements can also be included in an email to notify@diocesealex.org.

Art. 1190 – PLACES AND TIMES FOR WEDDINGS AND FUNERALS

§1. The Rite of Marriage within or without a nuptial Mass is always to take place inside a Catholic Church building unless a dispensation from canonical form has been granted. Even in this case, the location must be inside a building habitually used for worship.

§2. A funeral or memorial Mass is always to take place in a Catholic Church building. The funeral rites outside of Mass may take place in either a Catholic Church building or other suitable place.

§3. Generally, wedding and funeral rites can be celebrated at any time of the day on any day of the week. There is no formal *Diocesan Policy* in the Diocese of Alexandria to the contrary (see *Diocesan Policy* Art. 1180 on Marriage Preparation). Weddings therefore maybe celebrated on Saturday evenings. Funerals can also be celebrated on Sundays. Consult the *Ordo* to determine if the ritual Mass may be celebrated.

§4. The pastor or the rector of the church must approve the time and day of weddings and funerals in each case.

§5. The wedding or funeral rites within a Mass could depend on the availability of a priest who has not already celebrated two (2) Masses that same weekday (including Saturdays) or three (3) Masses that same Sunday. If a priest is available, given the factors mentioned, then the wedding or funeral in question can be celebrated within a Mass (c. 905).

§6. The Mass texts that must be employed are governed by a complicated set of rules. However, all is easily resolved by consulting *The Order of Prayer in The Liturgy of the Hours and Celebration of the Eucharist (Ordo)* for the current year on the date in question.

§7. Look in the *Ordo* under the appropriate date. A “V” symbol will indicate which Mass texts are to be used for ritual Masses (marriages, baptisms, ordinations etc). An “R” symbol means that a funeral Mass is permitted. The superscripted number that follows in each case can be understood by consulting the “Key to Symbols” in the front of the *Ordo*.

§8. Unless the *Ordo* permits the nuptial or the funeral Mass texts, then the texts assigned to the Sunday or feast itself or its vigil are to be used. In any case, the wedding or funeral can be celebrated. Generally, the nuptial and funeral Mass texts themselves will be permitted in “Ordinary Time.” The Mass texts of the Sunday will be required in special seasons such as Advent, Lent and Easter.

§9. Special attention should be paid to the “Pastoral Notes” in the *Ordo* especially around the sacred Triduum and other special times. These will explain exceptions to the general usage at other times.

§10. Between 4:00 P.M. Saturday and 11:59 P.M. Sunday ritual Masses do fulfill the Sunday Mass obligation.

§11. It is the responsibility of the priest to celebrate the proper Mass according to the liturgical norms (c. 1248).

Art. 1195 – NATIONAL NORMS FOR MARRIAGE PREPARATION

§1. In accord with the prescriptions of canon 1067 with due regard canon 1068, the following norms of The United States Conference of Catholic Bishops, having received the *recognitio* of the Holy See, are effective December 1, 2000. They supersede all things to the contrary. They do **not** derogate from existent and subsequent *Diocesan Policy* that implements them.

§2. The couple should receive appropriate education and pastoral preparation through participation in a marriage preparation program approved by the Diocesan Bishop.

§3. Parties should be questioned as to their freedom to marry.

§4. Baptized Catholics should present a recently issued (within the past six (6) months) annotated baptismal certificate.

§5. Where necessary, additional documentation (such as affidavits of parents) attesting to a Catholic party’s freedom to marry should be presented.

§6. Baptized non-Catholics should present satisfactory proof of baptism and freedom to marry. Signed and dated affidavits suffice when non-church issued documents are available.

§7. Unbaptized persons should present satisfactory proof of freedom to marry.

§8. Preparation for marriage should be in conformity with the prescriptions of canon 1063 (regarding what must precede marriage) and canons 1064, 1071, 1072, 1086, §2 and 1125, which entrust certain situations to the special care of local ordinaries.

§9. Preparation for marriage should comply with appropriate civil laws.

Art. 1200 – PARISH CATECHETICAL INSTRUCTIONS

§1. Catechesis is an essential part of the Church's ministry to children. This learning begins at home during a child's formative years as a child experiences love in the circumstances of everyday life. It continues when a child meets the parish community at Sunday Mass, in parish activities and in the parish catechetical program/parish school.

§2. The USCCB provides a listing, updated quarterly, of catechetical programs reviewed and approved that conforms to the *Catechism of the Catholic Church*. Any of these texts, and only these programs, may be used in Parish catechetical programs, Catholic schools or home school programs. Catechetical texts and materials as well as the approved listing are available for review through the Diocesan Office of Religious Education.

Art. 1205 – CATECHESIS AND HOME SCHOOLING

§1. The entire process for catechesis includes knowledge, the community, service, and worship. Therefore, home schooling for catechetical instruction or sacramental preparation cannot take place without reference to and supervision by the church parish (*GCD* #17; *NCD* #32; *CT* #20-26). The parish must continue to be a prime mover and pre-eminent place for catechesis (*CT* #67).

§2. Home schooling is not to be confused with parish catechetical programs based in homes.

§3. The following criteria are to be observed by those giving catechetical instruction or sacramental preparation in the home school environment.

- 1° The pastor must approve the program prior to implementation.
- 2° The local DRE must supervise the program and catechists implementing the program.
- 3° Catechesis must follow curriculum guidelines of the Diocese of Alexandria.
- 4° Evaluation methods at the parish level for each group or individual in written and/or oral forms must be established before the program begins.

Art. 1220 – SCHOOLS POLICIES HANDBOOK

The *Handbook of Policies for Catholic Schools* is published separately and is available to anyone for the asking from the Catholic Schools Office. By reference, it is a *Diocesan Policy*.

Art. 1230 – SEXUAL, ETHICAL OR PROFESSIONAL MISCONDUCT

§1. The *Diocesan Policy for the Protection of Minors* and the following additional policies, which are enacted in connection with the *Charter for the Protection of Children and Young People* and *The Essential Norms*, are hereby approved:

- 1° *Diocesan Communications Policy*
- 2° *Diocesan Policies Concerning Background Investigations*
- 3° *Diocesan Policies Regarding Protection of Minors in the Steubenville South Program*
- 4° *Diocesan Policy/Guidelines for Supervision of Minors on Trips and Other Functions*
- 5° *Diocesan Code of Pastoral Conduct*

§2. The following protocols are hereby approved and ordered for implementation in the Diocese of Alexandria:

- 1° Protocol for the Victim Assistance Coordinator
- 2° Protocol for the Administrator/Assessor
- 3° Protocol for the Receptionist(s)/Secretaries who have telephone calls concerning reports of the sexual abuse of a minor.

§3. All of these actions are taken in accordance with the *Charter* and the *Essential Norms* for the purpose of providing a safe environment for minors in the Church.

§4. The documents mentioned above are published separately and are available from the Diocesan Office and from the website: [Safe Environment Section of "Download Documents"](#). They are also available from the Diocesan Office and on the website in [Spanish -- Ambiente Seguro Section of the "Download Documents"](#). By reference, they are all *Diocesan Policy*.

§5. By reference, the [*Liability & Medical Release & Request to Participate Forms*](#) are *Diocesan Policy*. The appropriate form must be completed and properly notarized when required for minors and by all adults participating in youth activities of the Diocese of Alexandria at the diocesan, parochial or school level. Exceptions must be approved in writing by the Diocesan Bishop. (See Appendix L.)

Art. 1240 – POLITICS AND PUBLIC POLICY

§1. The Catholic Church and its Community Role: The Catholic Church in Louisiana has historically had a high profile, a role of leadership, and a commitment to serve both the temporal and spiritual needs of the State's citizens.

§2. Its help is sought by and readily given to city, state, and federal authorities not only during times of crisis or great need but over the long-range, day-to-day, collaborate with government agencies.

§3. The Church is a major contributor to the society in which we live. Its widespread social services and educational programs are clear illustrations. Its buildings are part of the State's heritage tourist lure. Its employment of thousands of men and women contributes heavily to the economy, and its presence—enhances and defends ethical standards and values.

§4. The Church also seeks, as we all should, to correct the imperfections around us and is obligated to speak on significant public issues.

§5. The Church is not something apart from society, but an integral part of it with a right and obligation to be a moral voice within that community.

§6. Limitations on the Church: The voice of the Church, however, is not always valued by public officials.

§7. Cardinal John O'Connor of New York summarized the position of the Church when he wrote: "Issue-oriented speech is entirely proper under the [Internal Revenue Service] Code's framework and is further protected by the First Amendment of the Constitution. The difference really boils down to people vs. issues. In the political arena, Church groups may not support or oppose people; they are encouraged, however, to support or oppose issues."

§8. Thus, the Church's guidelines limit its role in addressing issues. The Church may not become involved in partisan politics nor endorsing or opposing individual candidates for public office. Also see Art. 1242 on Printed Political Materials and Electioneering.

§9. The Church and Politics: On September 1, 1987, the Catholic bishops of the United States stated, "We bishops specifically do not seek the formation of a religious voting bloc; nor do we wish to instruct persons on how they should vote by endorsing or opposing candidates. We do, however, have a right and a responsibility as teachers to analyze the moral dimensions of the major issues of the day." Regrettably, the Catholic Church is frequently attacked for taking public positions on moral issues.

§10. Endorsement of or opposition to specific political parties or candidates for public office must be avoided.

§11. Parish, schools and other Church facilities, as well as those belonging to other Catholic groups, are not to be used for any activity related to the support or opposition to any candidate for political office, nor as places for partisan debate. The pulpit, especially, is never to be used by office holders or office seekers to advance their views or their political positions, nor as a forum for any individual, even a priest or deacon, to support or oppose a candidate or public official.

§12. Parish bulletins, websites, newspapers or other means of communication are never to be used to support or oppose a candidate for public office or to endorse or oppose a specific political party. Neither may official parish or school stationary or other displays be used in this way.

§13. *The Church Today*, our diocesan newspaper, and all other Catholic bulletins and publications, as well as any other advertising media on property controlled or owned by the Church, are not to accept political advertising in support or opposition to any candidate for public office or of any political party.

§14. No funds or “in kind” donations from any parish, school, or Catholic group are to be contributed to any political action committee, political candidate, political campaign or party.

§15. Private vs. Public Opinions: Clergy, religious, and others clearly identified with the Church do have the right to speak and express personal political opinions. However, it is difficult to separate individual private opinions of Church representatives from “official” statements. Therefore, the time and place for private political expression must be clearly distinct from “official” Church assemblies and properties.

Art. 1242 – PRINTED POLITICAL MATERIALS AND ELECTIONEERING

§1. All printed materials handed out on church property or distributed through church offices must have originated from one of three sources (1) the United States Conference of Catholic Bishops, (2) the Louisiana Catholic Conference or (3) the Diocese of Alexandria.

§2. This policy specifically prohibits the distribution of voter guides by organizations that represent themselves as Catholic but are not officially part of the Church. While these groups may be well intentioned, frequently they do not represent the full range of issues that the Church formally takes positions on. It is important that the Church be seen as impartial with respect to the election of candidates for political office.

§3. Additionally, no church property may be used for partisan electioneering purposes by political candidates. However parishes can hold nonpartisan candidate forums, parish voter education programs, and voter registration drives on church property. Practical advice as to how to conduct such activities can be found in the Faithful Citizenship website sponsored by the USCCB: www.faithfulcitizenship.org. Additionally, be sure to contact the diocesan attorney for a review of your plans. There are specific Internal Revenue Service regulations that must be followed. We have to be scrupulously nonpartisan in all that we do in this arena.

§4. The following activities are examples only:

1° Public officials who have already been elected to office, outside of the time near an election, may be recognized when visiting a Catholic church during Mass or other occasion.

2° The “victory party” may not be held in the parish hall following the election.

3° An inaugural Mass may be held for the governor, mayor, or other major office holder on the morning the oath of office is taken.

4° The church hall may be used for the town's inauguration of the mayor and council.

5° The posting of political signs or billboards are not permitted on Church property.

Art. 1245 – POLITICAL ACTIVITY WITH THE LEGISLATURE BY CLERGY

§1. Please access the LCCB Website for the latest information on the issues and individual bills of concern to the Church.

§2. Email or call legislators through the links in the LCCB website. Note the “Dos and Don’ts” listed there for dealing with legislators and see *Diocesan Policy Art. 1240* for further guidance.

§3. Download USCCB and LCCB website position papers on the issues and use them as parish bulletin inserts. If they are lengthy or complex, the key idea may be summarized.

§4. If a legislator is one of your parishioners, develop an open relationship where you can talk comfortably about the issues LCCB is working on. Never threaten a legislator in any form or fashion, even if he/she holds an important office because this severely hurts our efforts in the long run. Keep everything very positive. We are trying to convince them of our position.

§5. Thank legislators, verbally or in writing for the public service that they perform on behalf of the people of Louisiana. This is not an endorsement of this individual for reelection and is completely appropriate. You can do this both personally and publicly.

§6. It is preferable that you call LCCB Executive Director Danny Loar at 225-344-7120 before going personally to the State Capitol. He will provide you with important additional advice on what is happening at the Capitol that particular day.

Art. 1260 – PRISON MINISTRY IN PARISHES

§1. A prison, whether a state prison, state training institute, civil parish jail or city jail, shall be considered a mission of the Catholic parish in which it is located, not in the sense of Canon 516, but as a special center for pastoral care.

§2. A Catholic parish responsible for a prison should develop lay ministers and ministries for service to the prisoners and their families, as well as to the prison personnel and their families. Assistance from laypersons especially those with special gifts for this ministry who reside in other parishes, with the approval of their proper pastors may be invited to share in their ministry. A parish may also cooperate with churches of other denominations in the area.

§3. Lay ministry to prisoners and prison personnel could include, though not be limited to:

1° Visitation

- 2° Holy Communion and Scripture service
- 3° Informing the proper pastor when another sacrament is requested
- 4° Teaching basic skills, such as reading, writing, etc.
- 5° Assisting prisoners to write letters if permitted
- 6° Serving as a contact person with a prisoner's family according to the rules of the institution
- 7° Providing transportation when a prisoner is released
- 8° Providing minimal needs and personal items, when prison rules permit doing so
- 9° Conduct follow-up after a prisoner's release, assist with the return to the home environment, including job skill development, working with potential employers, etc.
- 10° Assist with religious instruction and spiritual counseling if qualified.

§4. A parish with a prison should cooperate with existing programs and prison chaplains. When service programs are needed but do not exist, a parish may help establish them in its prisons.

§5. Periodic reports concerning a parish's ministry to a prison are to be made to the Prison Ministry Coordinator, who in turn will provide an annual report to the Diocesan Bishop.

§6. The Prison Ministry Coordinator and other Diocesan personnel, through on-going formation programs shall provide opportunities for those in pastoral ministry to become more knowledgeable and comfortable with prison ministry.

§7. The needs of prison ministry shall be considered in the pastoral appointments of clergy.

Art. 1280 – REMEMBRANCE OF THE DECEASED IN FUNERAL RITES

§1. In the “Order of Christian Funerals” it is provided that “A member or friend of the family may speak in remembrance of the deceased” during the “Vigil for the Deceased” and again at the beginning of the “Final Commendation” (Order ## 80; 170; note restriction below). Clearly, no relative or friend may preach unless he is a member of the Catholic clergy. The brief comments are in the nature of personal reflections. In no way should these recollections be even similar to preaching.

§2. Preaching is expounding completely and faithfully the mystery of Christ in the ministry of the Word as the magisterium of the Church proposes. It takes on various forms; preeminent among them is the homily during the Mass that is reserved to Catholic clergy only (cc. 760; 767-768). This norm is confirmed in the “1993 Directory for Ecumenism” approved by the Holy Father March 25, 1993 (Directory # 134). A eulogy is not appropriate. However, brief illustrations from the life of the deceased are better.

§3. “On exceptional occasions and for a just cause, the Diocesan Bishop only may permit a member of another church to take on the task of reader” of Scripture during Mass (Directory # 133).

§4. Furthermore, for the good order of the funeral rites, it is prohibited to allow anyone to speak “in remembrance” during the “Final Commendation” during the funeral rite (in churches or funeral home chapels) even though it is provided in the liturgical books as mentioned in §1 above.

§5. Although neither preaching nor eulogizing is allowed during the funeral liturgy, either one member or friend of the family may speak briefly “in remembrance” of the deceased at the assigned time during the “Vigil for the Deceased” (in churches or funeral home chapels).

§6. It is for the pastors or rectors of churches to see to it that these prescriptions are explained to the family of the decedent and are conscientiously observed (c. 767).

Art. 1285 – FUNERALS FOR CLERICS IN QUESTIONABLE STANDING

§1. Those clerics who have been laicized or dismissed from the clerical state and those clerics whose de facto departure from active ministry, with or without the permission of the Diocesan Bishop, that has lasted for more than two (2) years are ordinarily buried as lay persons, unless determined otherwise by the Diocesan Bishop. Additionally, the provisions of §2, 1°-5° below, *mutatis mutandis*, are observed when applicable.

§2. Funeral rites are conducted as follows for clerics who have been formally accused of sexual misconduct involving a minor, regardless of the stage of the process, unless they have been completely exonerated.

1° The (alleging) victim of sexual abuse and the family must continue to have the protection of confidentiality and to be accorded the presumption of credibility. However, the cleric is still presumed innocent unless he has been proven guilty and only to the degree that civil and/or canonical processes have been completed.

2° The facts concerning an accused, deceased cleric shall be published and released by the Office of Communication of the Diocese of Alexandria and all inquiries, particularly from the media, shall be forwarded to this office. Clergy who serve in any civil capacity on behalf of the deceased shall likewise rely on this office concerning the publication of information concerning the cleric’s death.

3° The Diocesan Bishop and other diocesan officials will ordinarily decline any role whatsoever in the funeral rites. Those who do officiate, and especially those who preach, shall not eulogize or attempt to exonerate the cleric.

4° The liturgical rites for the deceased ordinarily do not take place in the Cathedral or any church in which the cleric was ever assigned without the express permission of the Diocesan Bishop.

5° Honors and solemnities such as Fourth Degree honor guards or priest-pallbearers are omitted. Contact the Diocesan Bishop for clarifications.

6° If a cleric had in life incurred, after due process, an imposed or declared canonical penalty prohibiting the public exercise of his ministry at Mass, then he is not vested as for Mass. If a priest had in life incurred an imposed or declared canonical penalty prohibiting the wearing of clerical clothing, then he is not buried in clerical attire. (These prohibitions do not

apply if only administrative restrictions or limitations have been imposed since these do not impute guilt.)

Priests who by their choice no longer celebrate Mass even privately, or deacons who have chosen to no longer function in their ministry, except for reasons other than health or retirement, are not buried as vested for Mass.

7º Priests may be buried in Maryhill Cemetery.

8º Funeral expenses of priests are paid in accord with Article 1100, §5, 9º.

§3. Deceased clerics whose status is uncertain, but who have not been accused of sexual abuse of a minor, shall be treated, *mutatis mutandis*, as in §2, 2º-8º above.

TEMPORAL GOODS IN THE LIFE OF THE PARTICULAR CHURCH

Art. 2000 – PARISH FINANCE COUNCIL

§1. 1° There is to be a parish finance council in every parish, including those that do not have a resident pastor, that shall meet no less than quarterly. If after dialogue with the pastor, the Council fails to meet or there is failure to follow sound business practices, each member is personally responsible to make known the facts to the proper dean in writing with a copy to the Diocesan Bishop within one (1) week. Whoever makes such a report is acting fully within his or her rights. No reprisals of any kind shall be taken against this person or any other participant, including employees, in this process.

2° *MISSION CHURCHES*: If a parish has mission churches, the pastor determines how the parish finance councils are to be organized. Some options follow: (1) members from each mission serve on the finance council; (2) each mission church has its own finance council; (3) the parish finance council serves all the churches in the parish without having representation from every mission. Once the model is determined, the councils are established and the relationships follow accordingly.

§2. The day-to-day operation of the business administration and finances of a parish/mission is the responsibility of its pastor and staff. A parish finance council deals primarily with those matters of greater importance as defined in law. It also assists the pastor in his supervisory and budgetary role as well as his overall fiscal needs and responsibilities.

§3. The term “pastor” refers to the one directly entrusted with the management of the parish including one who is appointed administrator, lay or clergy, with due regard for the rights of the one who is the proper pastor or endowed with the faculties of the proper pastor.

§4. A parish finance council is an agency of the parish pastoral council. The chair of the parish finance council or one of its members shall serve as an ex-officio member of the parish pastoral council.

§5. Each parish finance council shall be organized and function according to the guidelines set forth in Appendix C.

§6. **PARISH TRUSTEES**: Every parish must have two (2) laypersons as trustees of the parish according to their charters of incorporation (regardless of the number of mission churches). Trustees must have attended diocesan training or have completed it within one year of appointment. The proper pastor will present the names of the laypersons (who may be members of the mission churches) to the Diocesan Bishop. The Diocesan Bishop will appoint the trustees for a two (2) year period as stated in the charter. Trustees will be limited to two (2) successive, two (2) year terms or a period of four (4) years. After serving two (2) terms as trustees, a period of two (2) years must lapse before they may be again appointed. A term ordinarily runs from July

1, for 24 months until the end of June 30; if a trustee must be appointed to fill a vacancy, then his or her term ends on June 30 in the year of the expiration of the original term. A trustee who fills a vacancy must not have been a trustee for a full term previous to the appointment, but may be appointed to two (2) successive terms.

§7. Trustees must be appointed members of their proper parish finance council. They serve ex-officio *with* the right to vote during their term(s) as trustees.

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS

§1. FISCAL YEAR: The fiscal year for all entities of the Diocese of Alexandria is July 1 through June 30.

§2. ADMINISTRATION: The Pastor is the only canonical agent who can act or authorize another to act in the name of the parish, a public juridic person. The role of the Pastor as an administrator or the one who takes his place is defined in #30, “Standards of Performance” of Appendix C – Parish Finance Council Procedure below.

§3. DONATIONS: The written consent of the Diocesan Bishop is required for acceptance of a donation or bequest of any property or tangible item valued above the maximum limit of a pastor’s authority defined in *Diocesan Policy* Art. 2020, §4.

§4. ALIENATION: For validity, the Pastor must have the written recommendations of the parish pastoral council and the parish finance council and the written consent of the Diocesan Bishop for all acts of extraordinary administration (canon 1277) or “alienation” (canon 1292, §1) of real property or the goods of the Parish, School or other entity when the maximum limit of his authority will be exceeded. Alienation includes sales, loans, leases or expenditures for property, construction and improvement projects (including those funded by others). The maximum limit of a pastor’s authority is \$25,000 or 5% of a parish’s previous fiscal year’s taxable income, whichever is higher.

1° Furthermore, this amount refers to the total cost of a single project: it is not permitted to circumvent this requirement by considering a larger expenditure as a series of smaller ones. Likewise, a given project may not be divided into phases or several fiscal years for the same purpose.

2° This requirement applies to all expenses paid from parish, mission, school, cemetery, or other institutional funds or from some other contribution or source.

3° A request for the consent of the Diocesan Bishop shall be submitted by the first day of the month in which a response is expected. Some requests may take longer than a month for approval.

4° Detailed procedures are described in Construction and Renovation of Buildings above the maximum limit of a pastor’s authority defined in *Diocesan Policy* Art. 2020, §4. See *Diocesan Policy* Art. 2140 for procedural details.

5° Additional procedures are required for places of worship above the maximum limit of a pastor’s authority defined in *Diocesan Policy* Art. 2020, §4. See *Diocesan Policy* Artt. 2140 - 2141 for procedural details.

6° For insurance coverage to be in force, the Diocesan Business Office must be informed of all new construction or demolition before the project begins.

7° Pastors are held personally liable for invalid acts of administration.

8° The valid leasing of ecclesiastical goods owned by a parish requires consent of the Diocesan Bishop when the market value of the goods to be leased exceeds \$100,000 or the lease is to be for 1 year or longer.

§5. CIVIL LEGAL REQUIREMENTS: Canon law requires that all fiscal matters be civilly valid. To this end, each parish, a public juridic person in canon law, is also civilly incorporated. The Diocesan Bishop is President of each parish corporation; the Vicar General is Vice-President; the Pastor is the Secretary-Treasurer; and two (2) laypersons, duly appointed as described above, are Trustees. Together they form the Board of Directors. Whenever the parish civil corporation acts in a civilly valid manner, a corporate resolution of the Board of Directors is required. This resolution may only empower and authorize the Secretary-Treasurer (the Pastor or his designee) to act on behalf of the civil corporation. It must be drafted, signed, notarized, and retained in a book of corporate resolutions in the parish files. Such resolutions are ordinarily drafted by the Diocesan Finance Officer to ensure proper legal terminology and content. A copy must also be retained by the Chancery.

§6. FINANCIAL REPORTING: Quarterly Financial Reports are required for each location regardless of income level. Parish and missions file separate reports.

1° Quarterly Financial Reports are to be filed for the quarters ending September 30th, December 31st, March 31st and June 30th of each fiscal year.

2° Reports are due in the Diocesan Business Office within 30 days of the close of each quarter. The standard diocesan Quarterly Financial Report form is to be used. Copies of these may be obtained from the same office.

3° With the Fourth Quarter Report, there is due a more complete accounting of ALL parish and school funds on the Summary Page. Also due is a form letter detailing the meeting dates, council memberships and confirming review of the quarterly financial reports for the fiscal year just ended as well as attendance at diocesan training by pastor, trustees and council chairs.

§7. PARISH ASSESSMENT POLICY: Parish/Mission assessments are based on the prior twelve (12) month's assessable income as reported on the parish/mission quarterly financial reports for the quarters ending June 30th, September 30th, December 31st and March 31st of the previous year.

1° The total of "Income – Assessable" on the Quarterly Report is the only amount taxed. The Parish Chart of Accounts is a *Diocesan Policy*. It is available from the Diocesan Business Office at [Parish Chart of Accounts \(Quick Reference\)](#).

2° Reduction of assessment rate by 2% is allowed for parishes that maintain and support parochial schools. No other credits are permitted unless in writing by the Diocesan Bishop.

3° The following tax schedule provides for calculation of the assessments on an annual basis.

Annual Assessable Income	Assessment Rate
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Annual Assessable Income	Assessment Rate
Less than \$15,000	5%
\$15,000 - \$19,999	5 %
\$20,000 - \$29,999	5.5%
\$30,000 - \$39,999	6.5%
\$40,000 - \$49,999	7.5%
\$50,000 - \$59,999	11%
\$60,000 - \$69,999	12%
\$70,000 - \$79,999	13%
\$80,000 - \$89,999	14%
\$90,000+	15%

4° The annual assessment amount is divided by 12 and billed to each parish on a monthly basis (1/12 per month; no change month to month). The initial billing is for July of each fiscal year.

§8. ASSESSMENT OF SPECIAL PROJECTS: A reduction in assessments for a fund-raising project, or other building fund collections, may be sought under the following conditions:

1° The amount anticipated for the project must be predetermined before approval is given.

2° The time frame for the length of the project must be established; if construction is involved, the duration of the complete project is to be included in the time frame.

3° The parish assessment on income from previous years is not reduced.

4° If total is \$50,000 or less, the first \$25,000 is not assessed, the second \$25,000 is assessed at 3%.

5° If total is \$50,000-\$500,000, the first \$50,000 is not assessed, the amount from \$50,000-\$200,000 is assessed at 3%, and from \$200,000-\$500,000 is assessed at 5%.

6° If total is above \$500,000, the first \$50,000 is not assessed, the amount from \$50,000-\$500,000 is assessed at 3% and above \$500,000 is assessed at 5%.

7° The request for the assessment reduction must be in writing to the Diocesan Bishop and receive approval prior to the commencement of the project.

§9. SPECIAL DONATIONS/SALES: A reduction in assessments is also available for Special One Time Donations - Designated (COA #3310) or gain on Sale of Real Property (COA #3700). These receipts will be exempted from assessments for all *individual* gifts or gains of \$5,000 or more. Gifts and gains of less than \$5,000 will all be taxed at 5%. Contact the Diocesan Business Office to obtain these reductions and document them with your next quarterly report.

§10. SPECIAL COLLECTIONS, as prescribed annually, are to be taken up in all churches for diocesan, national or universal projects. Pastors are authorized to take up special collections only for building, school and charitable works of their own parish or extraordinary collections for other Catholic entities. It is forbidden to take up collections in church for any other worthy cause, even non-profits or needy individuals or families without the express, written consent of the Diocesan Bishop. Parish collections, including the Infirmed Priests Collection and Retired Priests Collection (Art. 1108, §2, 3°), may be retained for use in and

by the parish only. For all other collections, including appeals made by visiting clergy on behalf of Catholic entities, 100% of the funds are to be transmitted directly by parish check as a lump sum to the Diocesan Business Office as they are received (see Canon 1266). Please include the name and mailing address of the Catholic entity, as well as the visiting priest's name if applicable, for these extraordinary collections.

§11. PARISH/MISSION FINANCIAL REVIEWS: A review may on occasion be required by the Diocesan Bishop.

1° The Diocesan Business Office will bear the costs of these reviews.

2° Parishes will be given sufficient notice of the review date, normally three (3) months in advance, in order to prepare and reconcile their financial records. In cases of transfers, parish insolvency, failure to pay outstanding accounts and other financial difficulties, this notice may be shortened or waived.

3° Parishes are to have the following financial documentation available for review by the outside auditors:

- General Ledgers-Cash Receipts & Cash Disbursements Forms for the current as well as prior fiscal years. (Three years minimum)

- Listing of all bank accounts by name, financial institution and account number including checking, savings, CD's, or any other funds available. This listing should also include accounts of parish organizations such as Altar Society, St. Vincent de Paul, etc. Accounts closed at least during the last three years should be listed and noted.

- Bank statements for all cash accounts with canceled checks and deposit slips. (Three years minimum)

- Copies of Quarterly Financial Reports. (Three years minimum)

- Copies of W-2 earning statements and Form 941 Quarterly Payroll Reports. (Three years minimum, if applicable)

- Copies of Charitable Gaming Reports filed with the Louisiana State Office of Charitable Gaming. (Three years minimum, if applicable)

- Listing of any notes or loans outstanding. This listing should include loan number, name of financial institution, amount of loan, and monthly payment due.

- Listing of outstanding bills or accounts payable. This listing should also include outstanding amounts owed to the Diocese such as assessments, consolidated insurance, priest retirement or group health premiums.

§12. TAX EXEMPT STATUS: The Diocese of Alexandria corporation, its subsidiaries and all parish corporations and their subsidiaries, as non-profit religious organizations, are recognized by the Internal Revenue Service as a tax-exempt organization under Section 501 (c)(3) and receives this exemption annually through Group Ruling #0928 of the United States Catholic Conference See <http://new.usccb.org/about/general-counsel/group-tax-exemption.cfm>.

1° Affiliation with the United States Catholic Conference is verified by being listed in the Official Catholic Directory (OCD) that is published by Kenedy & Sons and filed annually with the Internal Revenue Service.

2° This tax-exempt status means the diocesan and parish corporations and their subdivisions are not subject to federal income and unemployment taxes. Contributions to these

entities are deductible for federal income, gift and estate tax purposes. This has no bearing on state sales tax.

3° Copies of the annual group ruling as well as an explanation of the group ruling from the Office of General Counsel of the USCCB can be obtained from the Diocesan Business Office.

Art. 2025 – FUND-RAISING IN PARTICULAR AND ALL GIFTS RECEIVED BY THE CHURCH PARISH IN GENERAL

§1. In accord with canon 1262 and the complementary legislation approved by the USCCB and given the *recognitio* of the Holy See, parishes, schools, other institutions, religious orders and professional as well as religious fund-raisers are to abide by the provisions of this law for the United States.

§2. All provisions in this Article apply not only for a given appeal for a specific project, but also are normative for the good stewardship of all gifts given to church parishes and institutions. Therefore, fund-raising also applies to the regular offertory and special collections

1° Fund-raising appeals are to be truthful and forthright, theologically sound, and should strive to motivate the faithful to a greater love of God and neighbor.

2° Fund-raising efforts are to be for defined needs.

3° The relationship of trust between donor and fund-raiser requires that

- funds collected are used for their intended purposes;
- funds collected are not absorbed by excessive fund-raising costs.

4° Donors are to be informed regarding the use of donated funds and assured that any restrictions on the use of the funds by the donor will be honored.

§3. In this diocese, if there is to be a fund-raising campaign, a request for approval is to be made to the Diocesan Bishop when the reduction of the assessment as provided in Art. 2020, §8, is also made (see Art. 2140, §1 on Construction and Renovation Processes). It is to be made in writing before any fund-raising effort begins or a professional fund-raiser is employed.

1° The petition must state the purpose for which the funds are being raised, the time frame and the methods to be used in raising them.

2° If a professional company is being employed, contact information, documentation and any contracts that will be signed by the pastor, if approved, are to accompany the request.

3° Evidence of consultation and the concurrence of the Parish Pastoral and Finance Councils shall be included.

§4. It is forbidden to take up collections for any worthy cause, even non-profits or needy individuals or families without the express, consent of the Diocesan Bishop (see Art. 2020, §10).

§5. The pastor shall make a detailed report on the extent to which promises expressed or implied have been fulfilled when special gifts have been solicited. This accounting is due to the donors with a copy sent to the Diocesan Bishop in a timely manner.

§6. Reports of the financial condition of the parish in general and all fund-raising projects in particular are to be published and prepared in scope and design to meet the particular concerns of those to whom they are due:

- 1° the parishioners and other donors to the church at least annually
- 2° the finance council (and school advisory council) at each meeting and the pastoral council at least quarterly
- 3° the beneficiaries of the funds raised at least annually
- 4° the Diocesan Business Office, in addition to the Quarterly Report, shall receive fund-raising reports published or distributed in accord with this Article.

§7. Each January for the preceding calendar year, in accord with IRS requirements for donors (Publication 1771 revised: <http://www.irs.gov/pub/irs-pdf/p1771.pdf>), pastors are to send statements of contributions to donors.

§8. Parishioners are to receive a report, at least in summary form, of the assets, income and expenses of the church parish on an annual basis shortly after the end of the fiscal year. Likewise parishioners and parents are to receive a similar report for a school. The actual cost per child is to be calculated and disseminated (The Catholic Schools Office should be consulted in making this determination).

§9. Special care is to be taken to see that ethical business relationships are maintained by professional fund-raisers, church parishes and schools with suppliers of goods and services.

§10. Agreements are not to be made that directly or indirectly base payment to a professional fund-raiser on a percentage basis.

§11. Pastors and their councils shall keep abreast of government regulations that touch upon the financial welfare of the parish. See <http://www.irs.gov/pub/irs-pdf/p1828.pdf>.

Art. 2030 – RESIDENCE IN THE RECTORY

§1. Residence in a rectory for a period of more than thirty (30) days requires the assignment of the Diocesan Bishop.

§2. Persons granted residence by reason of connection such as a parent of a priest or the wife of a deacon must depart the premises at the same time as the assignment ends. If the assigned person dies in office, thirty (30) days from the date of death are permitted before the premises must be vacated.

§3. Pastors alone have the right to grant temporary residence of less than thirty (30) days, to restrict parts of the rectory to certain classes of persons and to govern rectory life so that scandal is avoided.

§4. Just reimbursement is due to the parish by those who live in residence. The value shall be determined in accord with *Diocesan Policy Art. 1100 §1, 2°*.

Art. 2040 – LAY EMPLOYEES

§1. SOCIAL SECURITY (FICA) AND WITHHOLDING TAXES: All parishes and their subsidiaries (employing organizations) must observe all civil laws, both Federal and State, regarding employment taxes.

§2. Effective January 1, 1984 all non-profit organizations were required to withhold and pay Social Security (FICA) taxes. This regulation superseded all previous exemptions and applies to all employing organizations.

§3. The Internal Revenue Services defines an employee as any individual who is paid \$100.00 or more in wages in a calendar year. The method of payment, i.e. cash or check,. The status of the employee, i.e. part-time, temporary or full-time is also irrelevant. The employer-employee relationship exists when officers or agents of the parish or subsidiary have the right to control, direct or terminate the individual who performs the services. The IRS has a strong bias toward classifying anyone who receives remuneration as an employee. Employers do not exempt employees by substituting classifications such as “salary” or “contract payments” for compensation the IRS considers subject to FICA and withholding.

§4. The current employee FICA rate is 7.65%.

§5. The employing organization is required to match the employee FICA withheld and to forward both contributions to the IRS. The frequency of transmittal, i.e. weekly, monthly, quarterly, is determined by the amount of FICA owed.

§6. A quarterly report Form 941 or 942 must also be filed with the IRS. These forms summarize the wages paid, taxes withheld and balances owed. Reports are due within 30 days after the close of each calendar quarter.

§7. To withhold and file the necessary federal returns, each entity must have a Federal Employer Identification Number (EIN). This can be requested from the IRS by completing FORM SS-4.

§8. More detailed information and instructions on Social Security withholding and reporting can be found in IRS publication Circular E - Employer’s Tax Guide. This is available at the local IRS office. Additionally, Federal and State taxes must also be withheld and paid on behalf of employees. Contact the Diocesan Business Office for assistance if needed.

§9. Failure to withhold and file employment taxes will result in significant monetary penalties. Under current law, corporate officers and other individuals responsible for this function may be held personally liable for the payment of past due amounts as well as penalties. Church law requires compliance with civil laws and claims no exemption in employment matters.

§10. IMMIGRATION REFORM AND CONTROL ACT OF 1986, (FORM I-9): This law, in an effort to prohibit the employment of illegal aliens, requires documentation by all employing organizations to certify that their employees are citizens of the United States and/or aliens who are legally authorized to work here.

§11. All United States employers, *including churches and schools*, must complete and retain a Form I-9 for each employee hired after November 6, 1986, even if the employer is certain the employee is a U.S. citizen.

§12. The law requires the employer to do five (5) things:

- 1° Have employee fill out his/her part of the Form I-9 when he/she begins employment.
- 2° Check employee's documents to verify identity and eligibility to work.
- 3° Complete the employer review and certification part of Form I-9.
- 4° Retain Form I-9 at least three (3) years, or one (1) year after the employee terminates employment, whichever is longer.
- 5° Present Form I-9 for inspection upon request by the Department of Labor within three (3) days of notice.

§13. Failure to follow the above requirements can result in both civil penalties and fines for the employer.

§14. For further information, contact the Diocesan Business Office.

§15. UNEMPLOYMENT COMPENSATION: As non-profit tax-exempt organizations, employing organizations do not participate in the Federal or State unemployment compensation program. This means an employee who is dismissed or terminated cannot draw unemployment compensation.

§16. Recognizing the need to assist the employee and his/her family during this period of adjustment, the employing organization gives a one-time severance benefit in an amount equivalent to 4 weeks salary or regular wages. This benefit is extended to all *regular, lay* employees who are terminated, regardless of the reason or circumstances of dismissal.

§17. Employees who resign from a position or who have not completed their probationary period are not eligible for this benefit.

§18. Teachers and other professional employees hired on a contract basis are also not eligible. In these cases, the *Diocesan Handbook of Policies for Catholic Schools* and the individual contracts should be reviewed.

§19. In the event a claim for unemployment compensation is filed by a former employee, the form should be returned to the State with the following annotation: "Please be advised that (*Employing organization*) is recognized by the Internal Revenue Service as a non-profit tax-exempt organization. Additionally, it is exempt from the Louisiana Unemployment Insurance Program. Accordingly the Notice of Claim Filed for (*Employee Name*) is not applicable and is being returned to your office without action."

§20. For additional information, contact the Diocesan Business Office.

§21. GROUP HEALTH PLAN: The Diocesan Business Office administers a group health insurance program whereby employees of all employing organizations may obtain individual or family coverage on a shared cost basis. To be eligible, an individual must be a full time employee, that is, working twenty (20) hours or more per week.

§22. Cost of the program is shared by the employer and employee. The parish or school pays a fixed portion of the individual monthly premium with the remaining portion and any family add-on coverage being paid by the employee. Any employee payment of premiums is handled through payroll deduction.

§23. This is a diocesan mandated employee benefit. If an employee wishes to participate in the program, the parish or school must fund the employer portion as is published annually through the Diocesan Business Office.

§24. Participation begins on the first of the month following the employee's 60th day of employment. Application for coverage must be made within 45 days of employment to ensure the forms are received by the insurance carrier prior to the initial enrollment date. If application is made after this date, a health questionnaire must be completed and the insurance carrier may require an employee to pass a medical examination before he or she can be insured. No such questionnaire or exam is required if enrollment is within the initial period.

§25. An employee's participation in the group insurance plan ends upon termination of employment. Benefits may however be extended up to eighteen (18) months if requested in writing by the employee. The employer is not required to contribute to the premiums during this extension. Actual coverage will end on the last day of the month for which the premium has been paid. No grace period is provided.

§26. Full details of the group health insurance, its costs and coverage, can be obtained from the Diocesan Business Office.

§27. LAY EMPLOYEE RETIREMENT PLAN: This Plan is designated as a "defined contribution" program, which means the amount to be paid in for each participant is speci-

fied. The benefits available to the participant at time of retirement is dependent on various factors such as number of years in program, earning levels, etc.

§28. **Eligibility** - The Plan is open to employees of the employing organizations who work 1,000 hours or more in the calendar year. To begin participation, an employee must have 3 years or more of service at any employing organization.

§29. Participation is strictly voluntary and is elected by the completion of an Adoption Agreement by the employee. If the election is made, the employing organization must participate and fund.

§30. **Contributions** - The Plan is *fully funded* by the employing organization. Contributions to the Plan are based on a percentage of the compensation received by an employee during the applicable working year. This percentage begins at 1% with a increase each year as follows:

First Year of Participation	1%
Second Year of Participation	2%
Third Year of Participation	3%
Fourth Year of Participation	4%
Fifth Year of Participation	5%
Each Year Thereafter	5%

§31. Contributions are made semi-annually on June 30th and December 31st of each year. Each employing organization will receive a package from the Diocesan Personnel Office outlining the program prior to those dates, ordinarily by the 15th of May and November.

§32. **Vesting** - An individual has a vested interest in the contribution made in his/her behalf upon deposit of the funds with the Custodian. This means ownership of the funds transfer to the participant when his/her individual retirement account is credited. This ownership is irrevocable and non-forfeitable, subject to applicable legal and governmental regulations.

§33. More information on the retirement program can be obtained from the Diocesan Personnel Office.

§34. **WORKERS COMPENSATION:** All employees of the employing organizations are covered by Workers Compensation Insurance that provides coverage for occupational illness and injury. This insurance is provided through the Diocesan Consolidated Self-Insurance Program.

§35. Coverage includes weekly payments based upon the employee's regular earnings as well as payments for medical and hospital expenses. The program is administered in accordance with the Workers Compensation Law of the State of Louisiana and all applicable federal and state regulations.

§36. State law requires the completion of a First Report of Injury for all employee related occupational injuries. The report is to be submitted to:

AVIZENT
1625 West Causeway Approach
Mandeville, LA 70471

§37. Any accident/injury that results in an employee's death or disability (absence from work) for more than seven days must also be filed with the State Office of Workers Compensation.

§38. AVIZENT processes day-to-day claims; overall administration is handled through the Helouin Insurance Agency, the agent for the Diocesan Consolidated Self-Insurance Program. For additional information, contact the Diocesan Business Office.

§ 39. DIOCESAN PERSONNEL POLICIES: The *Personnel Policies Manual for Diocesan Offices* is published separately. By reference, it is *Diocesan Policy*.

Art. 2060 – CONSOLIDATED SELF-INSURANCE PROGRAM

§1. The Diocese of Alexandria is self-insured for all coverage other than group hospitalization insurance. Through the diocesan Consolidated Self-Insurance Program, all parishes, schools and institutions are provided property, auto, worker's compensation and general liability coverage.

§2. The self-insurance program works on a shared risk basis, that is, the diocesan pool pays a portion of the claims up to a fixed amount with any excess being absorbed by the insurance carriers. The current program calls for a self-insured loss fund of \$225,000 with a stop loss limit of \$25,000 per location for non-named storms. This means that the diocesan pool will pay up to the first \$25,000 per location but will not pay out more than \$225,000 in a given insurance year for non-named storms.

§3. A separate deductible now applies for damages caused by storms named by the National Weather Service. For damages caused by these storms, each location will be responsible for a deductible equal to two percent (2%) of the replacement value of the location as stipulated by Catholic Mutual Group.

§4. The program is the responsibility of the Diocesan Business Office with claims administered on a day-to-day basis by Helouin Insurance Agency, which is located in Baton Rouge, Louisiana as follows:

Helouin Insurance Agency
Attn: Mr. Jimmy Helouin, CIC
3127 Cavelier Drive
Baton Rouge, LA 70816-2130
(800) 349-9677

§4. The insurance program is operated on a fiscal year that runs from July 1st through June 30th. Premium billing to the parishes, schools, and institutions is done on an annual basis with the June 30th statement of each year. The amount of the total billing to the parishes, schools, and institutions is contingent on three factors:

- 1° The Loss Fund to be covered
- 2° The premiums from the insurance companies for the excess coverage
- 3° The administrative fee for Helouin Insurance Agency

§5. Any surplus funds generated by the self-insurance program are transferred to the Priests' Retirement Plan.

§6. For further information on this program, contact the Diocesan Business Office.

§7. **SPECIAL EVENTS POLICY:** Certain insurance requirements must be fulfilled when church buildings or properties are rented or used by persons or organizations that are not church/school sponsored. In addition, no such additional insurance is required from parish organizations. It is for the pastor to determine whether any event is "sponsored", thereby making it eligible for inclusion under regular institution insurance coverage.

§8. Consistent with the concept of the parish as community, the definition of "church-/school sponsored" includes the following: Parishioner sponsored activities that are of a personal or family nature, i.e. wedding reception, anniversary celebration, birthday party, family reunion, or similar function.

§9. Specifically excluded from this definition are situations where a parishioner may pay a fee or utilize church facilities as a member of and for the use of an organization such as a civic club, sorority, etc. Any business use of church facilities by parishioners is also excluded from this definition. In these cases, proof of liability insurance must be provided by the user and the parish and Diocese of Alexandria must be named as additional co-insured.

§10. If church property is rented or provided for non-church/school sponsored gatherings, the person or organization will be required to provide a certificate of liability insurance naming the parish and Diocese of Alexandria as additional co-insureds. A home or business insurance policy may be utilized when coverage is required by the pastor, provided that this coverage is not excluded by the policy.

§11. **RESTRICTED USES:** To promote the dignity of valid marriage all Church property (church buildings, rooms, halls, gyms, etc.) may only be used or rented for its celebration on occasions (parties, showers, dinners, dances, receptions, anniversaries, etc.) related to a wedding in accord with the law of the Catholic Church. "Marriages in accord with Church law" are those in which there is at least one Catholic party, celebrated under the auspices of the Roman Catholic Church. Also included in the definition of "marriages in accord with Church law" are those in which neither party was or is Catholic and neither party has been previously married, regardless of the minister or judge before whom it has or will occur. It is for the pastor to make this determination.

Art. 2080 – SALE AND USE OF ALCOHOLIC BEVERAGES

§1. Parish/school sponsored events and activities:

1^o It is at the discretion of the pastor/administrator to determine the pastoral appropriateness concerning the sale and/or serving of alcoholic beverages at events sponsored by and/or taking place on parish or school premises or at other locations. Even greater caution should be exercised when minors are present at an event.

2^o The Safe Environment Policies of the Diocese of Alexandria prohibit the possession, purchase or use of alcohol by those adults, whether employed or volunteer, who have a general **supervisory** relationship (broadly defined) with youth that have not yet reached the age of 18 during a trip or function as well as all associated activities. See §3 for examples.

3^o A written policy should be developed to meet the needs of the parish/school outlining the details of the use and/or sale of alcoholic beverages and should be applied fairly and consistently if the pastor determines that the use of alcohol is pastorally prudent. This publication should include a plan for addressing excessive consumption issues by participants.

4^o All civil legal requirements, such as licenses and fees, must be followed completely for the jurisdiction(s) under which the parish/school falls.

5^o Law enforcement personnel in uniform are to be present on the premises if there is a reasonable possibility that alcoholic beverages will be brought onto the premises during fund-raising or social events. This requirement would apply also if there is a reasonable concern that overindulgence could occur.

6^o If alcoholic beverages are served and/or sold these are to be dispensed by responsible adults at least 21 years of age. Only one drink may be served at a time and the one serving may not consume alcohol while on duty. No ‘open bar’ allowing uncontrolled access is permitted. Alcohol may never be served to anyone under age 21. Proof of age should be verified if any doubt exists.

7^o Every reasonable precaution shall be taken to ensure that the only alcoholic beverages are brought into the event that are under the direct supervision of those responsible for the event. There is to be no “BYOB” (Bring Your Own Bottle) unless all the requisites of 6^o above are fulfilled.

8^o It is strongly encouraged that food be served throughout all events at which alcoholic beverages are served.

§2. The following activities are examples only and similar activities may, but not must, be permitted by the pastor/administrator:

1^o A parish wants to form a softball team ranging in age from 16-25 of females and males to play in a weekend tournament at a festival. Beer and other adult beverages will be on sale. Can they? Yes, provided that the entire team, coaches and all adults directly associated with the trip agree that they will not indulge in alcohol for the sake of all those under 21. The details and supervision may be difficult, but will be worth the effort.

2^o A school wishes to hold a fair. During the day, alcohol will not be consumed on the premises. It is proposed that a dance be held in the evening and that alcohol be served in accordance with the policy above. Young people under 18 and even some pre-teens will be present with their parents in the dance. Baby-sitting will be provided. Can such a dance be held and who

is supervising the youth? Yes, the dance can be held. The young people MUST be with their own parents/legal guardians who are free to consume alcohol. There are no parish/school direct supervisors of the youth. Uniformed police must be present. If the parents leave, their children must also.

§3. Events and activities not sponsored by parish/school on church owned premises:

1° If the use of alcohol is permitted by the pastor/administrator, the details enumerated in Art. 2080, §1 above shall be included in a signed rental/use agreement.

2° Whenever a parish/school facility is rented or used by an individual or group, including parishioners and alcohol is to be consumed, significant liability exposure becomes a reality. This policy also requires compliance with Art. 2070, §§7-11 above.

3° All signed agreements and fees shall be completed and paid-in-full prior to the event.

Art. 2100 – ASSETS OF PARISH ORGANIZATIONS AND SOCIETIES

§1. Any parish or school organization, society, ministry or club not separately incorporated is fiscally accountable to the pastor of the parish.

§2. All assets of any such association are the property of the proper parish itself.

1° all accounts shall bear the name and the Federal tax identification number of the parish. Accounts that do not bear the Federal tax identification number but enjoy the privilege of the tax-exempt status offered the Catholic Church in the annual IRS Group Ruling through the parish are the property of the proper parish itself and are subject to the authority of the pastor as defined herein.

2° Each account shall bear the pastor's signature as one of the authorized signatures and he shall be capable of signing all instruments alone.

3° Generally accepted accounting procedures and controls shall be employed in the management of these parish funds. The pastor may authorize an audit of the organization by an independent person as needed or desired. It is within the province of the parish financial council to know the details of any parish association's fiscal management.

4° All universal and diocesan norms governing the temporal goods of the Church are applicable to parish organization.

5° At the end of the fourth quarter of each fiscal year a written accounting of the assets shall be presented to the pastor. He may require this information more frequently. All income and expenses as well as account balances from this report shall be reflected in the Fourth Quarter Parish Financial Report of the parish to the Diocesan Business Office.

§3. Each organization must have a constitution clearly defining its purpose and approved by the proper pastor. A constitution may only be amended when its members and the proper pastor mutually consent.

§4. Revenue or other funds may be collected and expended only for the general purposes of the association.

§5. Income shall be collected or expended for the purpose outlined in the constitution only and according to the nature and purpose of the organization.

§6. Neither the membership nor a pastor alone has a right to expend funds for other purposes.

§7. Individually designated gifts for a specific purpose may only be used for a different purpose with the consent of the donor.

§8. Expenditures under a predetermined amount or for defined purposes as determined in a constitution shall be freely made by the membership of an organization. Expenditures above this predetermined amount or beyond the defined purposes require the consent of the proper pastor in writing.

§9. If an organization ceases to exist, funds in excess of debts and liabilities should be used for purposes consistent with the purpose of the organization as determined by the proper pastor unless specific procedures for dissolution are provided in the constitution.

Art. 2120 – CHARITABLE GAMING

§1. The conduct of charitable gaming or gambling shall be done in strict conformity with State and local law. The rules and regulations set forth in the Louisiana Office of Charitable Gaming “Administrative Rules & Regulations” and “Laws” shall be scrupulously observed at all times. It shall be the responsibility of the sponsoring organization to keep abreast and adhere carefully to any new provisions or changes to these laws and regulations. See the official website for more information: <http://www.ocg.louisiana.gov//sections/lawsregulations/default.asp>.

§2. No gaming activities are to be conducted in the name of the parish, school or parish organization at any location other than a parish hall, school, rented or leased building where the activity is under the direct control of the parish, school or parish organization. Therefore, commercial bingo halls, etc. in either name or fact may not be used.

§3. No one is to be paid to operate bingo, raffles or other gaming activities nor is a contract to be entered with any person or organization to operate charitable gambling in the name of a parish, school or parish organization.

§4. Any gaming activities not specifically authorized by the charitable gaming law and licensed to the organization is prohibited. This prohibition also applies during fairs and festivals, unless specifically approved by the Louisiana Office of Charitable Gaming.

§5. Charitable gambling is *permitted* by the State of Louisiana. However, pastoral prudence and discretion, especially in areas of the Diocese where the issue of gaming is very sensitive, should be exercised. Excessive gaming activities is not advisable and should be avoided, no matter how good the intentions or the worthiness of the cause.

§6. The Church challenges all to responsible stewardship and financial development. Catholics must realize more and more the Gospel's call to give sacrificially and support wholeheartedly the Church and its mission. As this approach becomes commonplace the need for bingo and other forms of gambling as a source of income for Catholic institutions may become unnecessary.

Art. 2140 – CONSTRUCTION AND RENOVATION PROCESSES

§1. Construction and major renovation requiring the consent of the Diocesan Bishop (in accord with *Diocesan Policy* Art. 2020, § 4, 5°) is a very time consuming, expensive and tedious undertaking. Moreover, it requires expertise in a number of fields. Therefore, experts at the parish and diocesan levels must be involved.

Paying for the project is of paramount importance: "For which one of you, when he wants to build a tower, does not first sit down and calculate the cost to see if he has enough to complete it?" (Lk 14:28). The parish pastoral and finance councils and the Diocesan Business Office (445-2401 x 215) must all be consulted immediately.

If funds must be raised, contact the Diocesan Development Office (445-2401 x 209) for assistance or recommendations of professional fund-raising companies.

If a loan will be needed, then a visit with several loan officers to obtain information about their bank's loan requirements should follow. Note that some banks may require that 50% to 80% of the cost of project must be held by the Parish in unencumbered cash in order to borrow the remainder. How the Parish can afford to repay the loan, both principal and interest, must be clearly demonstrated to the bank.

The remainder of this Article is tedious, but the Diocesan Business Office (445-2401 x 215) is charged with the responsibility of making the process flow smoothly and easily for Pastors and Parishes. Do not attempt this process without the helpful and encouraging assistance of this Office.

§2. To obtain the consent of the Diocesan Bishop the following phases guide the Diocesan Finance Council and the Diocesan Building Review Committee in their respective functions:

- Phase I, Development of the Preliminary Concept and Consultation
- Phase II, Formal Design, Engineering and Preparation of Bid Documents
- Phase III, Awarding of the Contract
- Phase IV, Construction

The elements of each Phase are subject to change according to the nature of the Project and the desires of the Pastor with the consent of the Diocesan Bishop.

§3. Phase I, Development of the Preliminary Concept and Consultation: In this phase, no professional is engaged and no funds are expended.

1° The Pastor, after consultation with his pastoral and finance councils as well as others in the Parish, presents:

- a preliminary description of the construction or improvement Project
- an initial "in-house" attempt at a detailed listing of what is desired in the building
- a rough sketch indicating approximate total square footage

- the approximate cost of the Project
- itemization of unencumbered cash on hand from the Parish available for Project (including the sources and amounts of this cash such as sale of capital, on-going building fund, capital campaign, fairs, bingo, etc and the approximate time it took to accumulate the funds)
- proposed financing for both the construction loan and the mortgage, e.g. rate of interest, term of loan, etc.
- plans for payment of any loan principal and interest (include the sources and amounts of this income such as sale of capital, on-going building fund, operating fund, capital campaign, fairs, bingo, etc, and the projected time it will take to amortize the loan)
- expected additional costs for the Parish/school operating fund of the new Project once it is operational; e.g. utilities, insurance, staff, etc.
- names and contact information for potential architects and the selection process or other professionals to be employed in the design phase
- description of the means of construction (Will the work be done by a general contractor after a public bidding process or are there other plans?)
- all documentation must be in the Moderator of the Curia's Office the first day of the month in which action is expected

2° The Diocesan Building Review Committee will recommend to the Diocesan Bishop the course of action for the professional design and construction of the Project. Prior to the Committee meeting, some Members will visit on-site with the Pastor and his representatives to gain information that will be reported to full Committee.

3° The Diocesan Finance Council reviews the financial data and will recommend to the Diocesan Bishop whether the Project should move to Phase II.

4° Having heard the Diocesan Finance Council and the Diocesan Building Review Committee, the Diocesan Bishop will decide whether to authorize the Pastor to proceed to Phase II and instruct him on any specific requirements.

5° If a design professional is to be hired, a corporate resolution and contract are required. These instruments are to be submitted to the Moderator of the Curia's Office in due time for a comprehensive review. From members of the AIA, form documents from the AIA are preferred. The instruments will be returned as soon as they receive a favorable review.

6° The Pastor is not authorized to begin the next phase or sign any contract until he is notified in writing from the Diocesan Bishop and receives the necessary corporate resolution.

§4. Phase II, Formal Design, Engineering and Preparation of Bid Documents: Great change in concept and fluctuation in cost may happen between Phases I and II. Depending on the scope of the Project, this step may be as complex as launching a competition to select an architect or as simple as having a designer to submit final plans. Therefore, this phase may take more than a year or only a few weeks. There are two possible positive outcomes in this phase. One result is authorization from the Diocesan Bishop for the Pastor to put the Project out for bids, requiring an architect, and not merely for proposals since the latter cannot be compared to one another. If the Project is not going to be put out for bid, the other possible result is the final approval of the design documents and the immediate implementation of Phase III.

1° A Member of the Diocesan Building Review Committee will be assigned to follow the course of this phase so that the Pastor may ask assistance from anyone on the Committee and it will be kept abreast of progress.

2° In the end, the Pastor, after consultation with his Pastoral and Finance councils as well as others in the Parish, and at his discretion with the assistance of a Member of the Diocesan Building Review Committee, presents to the Diocesan Bishop:

– the name, firm, contact information and qualifications of the architect
– the approximate cost of the professionally designed and completed Project
– itemization of unencumbered cash on hand from the Parish available for the Project
(Indicate the specific accounts and institutions in which the assets are held.)

– both the construction loan and the mortgage: rates of interest, types and terms of loans, payment per month, penalties for early payment of principal, description of property to be mortgaged, etc. with name of lending institution, lending officer and contact information
(A detailed letter from the lending officer is sufficient.)

– plans for payment of any loan principal and interest (include the sources and amounts of this income such as sale of capital, on-going building fund, operating fund, capital campaign, fairs, bingo, etc, and the projected time it will take to amortize the loan)

– expected additional costs for the Parish/school operating fund of the new Project once it is operational; e.g. utilities, insurance, staff, etc.

– the complete and final plans, drawings and bid documents (as they will be distributed to bidders) or the final design documents for the Project are to be submitted

– minutes of the (joint) meeting(s) of the Pastor with the Parish Pastoral council and the Parish Finance council signed by the members and the date when their signatures were affixed attesting to their reviews of the foregoing and their opinions

– State Fire Marshal's letter of approval and "Red Stamp" of plans as well as any other certificates such as zoning variances and other documents required at this stage

– All documentation must be in the Moderator of the Curia's Office before the first day of the month in which action is desired.

2° The Diocesan Building Review Committee reviews the plans and recommends to the Diocesan Bishop whether the Project is ready to be put out for bid or immediate implementation of Phase III.

3° The Diocesan Finance Council reviews the financial data and will recommend to the Diocesan Bishop whether the Project is ready to be put out for bid or immediate implementation of Phase III.

4° Having heard the Diocesan Finance Council and the Diocesan Building Review Committee, the Diocesan Bishop will decide whether to authorize the Pastor to put the Project out for bid or immediate implementation of Phase III and instruct him on any specific requirements.

5° The Pastor is not authorized to begin the next phase or sign any contract until he is notified in writing from the Diocesan Bishop and receives the necessary corporate resolution.

§5. Phase III, Awarding of the Contract: (It is possible that, because of the bidding process, a lapse of time since the documents for Phase II were submitted. Under such circumstances there has usually been an increase in costs. If there is no bidding process and a

very short lapse in time, simply submit the additional documents equivalent to the ones outlined below.)

1° The Pastor in consultation with his Pastoral and Finance Councils as well as others in the Parish, and at his discretion the assistance of a Member of the Diocesan Building Review Committee, presents to the Diocesan Bishop:

- a complete copy of the successful bid for the completed Project
- the exact contract that is to be signed by the Pastor and the successful bidder (From members of the AIA, form documents from the AIA are preferred.)
- copy of the contractor's performance bond and current insurance certificate naming the Parish and Diocese as additional co-insureds
- from the design professional or successful bidder a **Schedule of Payments** paid or due to any contractor, any professional (compensation of design professional according to contract must be adjusted based on bid) and for any permit or fee associated with the design and construction of the Project (Ideally, this Schedule is an electronic spread sheet that automatically calculates such items as retainage, amount budgeted, amounted expended and balance for management of individual and overall costs during the Construction Phase.)
- **Final Total Cost** of the Project including all design and construction costs, permits and fees (A contingency amount of 10% to 20% must be included in the request.)
- itemization of unencumbered cash on hand from the Parish available for the Project (Indicate the specific accounts and institutions in which the assets are held.)
- all construction loan documents that are to be signed by the Pastor and a detailed letter from the loan officer concerning the mortgage: rates of interest, types and terms of loans, payment per month, quarterly, penalties for early payment of principal, etc.
- plans for payment of any loan principal and interest (include the sources and amounts of this income such as sale of capital, on-going building fund, operating fund, capital campaign, fairs, bingo, etc, and the projected time it will take to amortize the loan)
- expected additional costs for the Parish/school operating fund of the new Project once it is operational; e.g. utilities, insurance, staff, etc.
- copies of all other legal documents the Pastor will execute
- a civil, corporate resolution authorizing the Pastor to act validly in all matters pertaining to accomplishing the Project
- minutes of the final (joint) meeting(s) of the Pastor with the parish pastoral council and the parish finance council signed by the members and the date when their signatures were affixed attesting to their reviews of the foregoing and their opinions
- All documentation must be in the Moderator of the Curia's Office before the first day of the month in which action is desired.

2° The Diocesan Building Review Committee reviews the construction documents and will recommend to the Diocesan Bishop whether construction should begin.

3° The Diocesan Finance Council reviews the financial data and will recommend to the Diocesan Bishop whether the financial matters and legal documents are in order and construction should begin.

4° Having heard the Diocesan Finance Council and the Diocesan Building Review Committee, the Diocesan Bishop will decide whether to authorize the Pastor to act to begin construction and instruct him on any specific requirements.

5° The Pastor is not authorized to begin construction or sign any contract until he is notified in writing from the Diocesan Bishop and receives the necessary corporate resolution.

§6. Phase IV, Construction:

1° A Project Checking Account, separate and apart from any other account, shall be used for any and all payments for the Project. Any Parish funds are to be transferred to this account before they are paid out for the Project. All loan receipts for the Project are to be deposited to this account.

2° The **Schedule of Payments** is to be annotated with the date, purpose and amount as each item is paid on the Project. Any payment not budgeted on the Schedule is to be carefully scrutinized and documented by the Pastor. Non-budgeted expenditures are to be added to the Schedule and expensed from the provision for contingencies.

3° With the Quarterly Report during the construction period, a copy of the Schedule of Payments shall be included and an itemized accounting of the Project Checking Account shall be presented (expenditures recorded on these two items should balance). At the end of the Project, a final financial accounting is to be rendered to the Diocesan Bishop.

4° A Member of Diocesan Building Review Committee will be assigned to follow the course of construction, reporting on progress of the work, change orders and responding to any questions from the Pastor that may arise.

5° The Pastor is required to have in writing the authorization of the Diocesan Bishop to sign a change order that will cause the Project to exceed the approved **Final Total Cost**. To obtain such authorization, documentation will be required. Successful application can be made through the Office of the Moderator of the Curia.

6° A copy of the plans (as built) for the Project to include detailed drawings, copies of all legal documents such as zoning variances, building permits, occupancy release from the Fire Marshall, lien releases, etc. and the financial data shall be placed in the Diocesan Archives.

ADDENDUM: Duro-Last Roofing [<http://www.duro-last.com/>] material is considered a best practice for roofing projects in the Diocese and is to be one alternative bid in any roofing project.

Art. 2141 – SPECIAL ADDITIONAL PROCEDURES FOR PLACES OF WORSHIP

§1. In addition to the general requirements of *Diocesan Policy* Art. 2040, the following elements are required to obtain the consent of the Diocesan Bishop in accord with *Diocesan Policy* Art. 2020, § 4, 5° when a place of worship is being constructed or significantly renovated.

§2. A knowledgeable and experienced consultant in liturgy, approved by the Diocesan Bishop, is to be employed in the design of the liturgical space.

§3. An Ad Hoc Diocesan Committee is appointed by the Diocesan Bishop for the Project.

1° Provides information and guidance to the Diocesan Bishop, the Pastor, Parish liturgy and building committees, as well as the Diocesan Building Review Committee, regarding the proposed construction.

2° Reviews, evaluates and comments on the plans and recommends to the Diocesan Bishop whether the Project should proceed at each Phase in *Diocesan Policy* Art. 2140 when the Diocesan Building Review Committee gives its opinion.

APPENDICES

Appendix A – POSITION DESCRIPTION FOR THE OFFICE OF DEAN

§1. *Preamble:* The Code of Canon Law expresses the rights and duties of the dean (vicar forane) (c. 555). This job description necessarily includes the law, but goes beyond the law in an attempt to identify and clarify the position of dean in his relationship to the Diocesan Bishop and the members of his deanery, both clerical and lay.

§2. The dean is an extension in his deanery of the Diocesan Bishop and, as such, is the proper channel to and from the Diocesan Bishop.

§3. This norm is not an attempt to isolate the Diocesan Bishop from his priests or people, for anyone has the right to approach the Diocesan Bishop directly. However, matters should be resolved at the parish or deanery level if possible and only having failed to reach resolution, should be brought to the Diocesan Bishop's attention. The Diocesan Bishop desires to work through his deans where possible and practical. This process often results in better communication and resolves problems more quickly and effectively.

§4. If the dean is approached by the parties especially in a sensitive situation, the Diocesan Bishop should be informed of the issue. He should also be notified of the resolution (Vicars Forane or Deans, Canons 553-554, Rights and Duties of Deans, Canon 555).

§5. Deans have the right and duty:

- 1° To promote and coordinate common pastoral activity within the deanery
- 2° To insure that the clerics of his district lead a life that is in harmony with their state of life and diligently perform their duties.
- 3° To insure that religious functions are celebrated in accord with the prescriptions of the sacred liturgy; the good appearance and condition of the churches and of sacred furnishings are carefully maintained especially for the celebration of the Eucharist and the custody of the Blessed Sacrament; the parish books are correctly inscribed and duly preserved; ecclesiastical goods are carefully administered; the rectory is maintained with proper care.
- 4° To insure that clerics, in accord with the prescriptions of particular law, attend continuing education programs, meetings or conferences in accord with the norm of Canon 279, §2.
- 5° To ensure pastoral care for the presbyters of his deanery providing access to spiritual helps and to be particularly concerned about those priests who find themselves in rather difficult circumstances or who are beset with problems.
- 6° To care for the priests of his deanery whom he knows to be seriously ill so that they do not lack spiritual and material aids; to see to the funerals of those who die assuring that they are celebrated with dignity; to make provision that when priests are sick or dying, official records, sacramental registers, important financial records, the Blessed Sacrament, sacramental oil, sacred furnishings and vessels or other things which belong to the Church are secured or stored properly

7° To visit the parishes of his deanery in accord with the instructions of the Diocesan Bishop.

8° To submit a report to the Diocesan Bishop about his deanery at least once a year, detailing not only the good that has been accomplished during the year, but also difficulties that have occurred, any scandals that occurred, what has been done to rectify them and what he has done to correct problems. This report may be oral or written.

§6. A Dean and His Relationship with the Bishop as Consultor: The dean is a priest who should be knowledgeable in his area regarding the priests, the faithful and the general situation, whether it be spiritual, moral or civil in nature. The Diocesan Bishop is free to consult with a dean so that he may be better informed. A dean, using his own discretion, should approach the Diocesan Bishop in all matters that are deemed necessary for his information and/or advice. His appointment as Dean does not of itself give him membership in the College of Consultors, because this body is approved for a fixed term collegially.

§7. As Communicators: The Bishop will use a dean as his channel of communications to a deanery. A dean is responsible for convoking deanery clergy meetings whenever he judges it necessary. Such a meeting will provide the clergy an opportunity to discuss the pastoral situation of a deanery and to coordinate programs.

1° Deans will communicate the results of the meetings of diocesan boards and committees to the clergy for their information and/or feedback. Such feedback is to be communicated to the Diocesan Bishop via the minutes of the deanery clergy meeting.

2° A dean is responsible for arranging days of recollection or prayer for the clergy of the deanery.

3° A dean is to devise a system of telephone communication whereby the priest in the deanery may be contacted in the shortest amount of time possible to handle any emergency, e.g., notification of death and funeral of a priest.

§8. Supporter: A dean will support the programs and institutions of the Diocesan Bishop. A dean is a personal extension of the Diocesan Bishop. He should act to support him even if he personally does not agree with the Diocesan Bishop's wishes.

§9. A Dean in Relationship with Priests as Conciliator: A dean may be conciliator between two priests, or between a priest and a layperson. The first step is for the two parties who are at odds to try to reach a solution. If this attempt fails, then recourse to the proper dean should be made. If the situation cannot be resolved at the deanery level, then the Vicar for Clergy or other appropriate diocesan officials may be approached and finally the Diocesan Bishop should be consulted.

§10. As Facilitator: A dean may be a facilitator for parish councils, groups and pastor, parish problems, religious groups, parish or deanery problems.

1° A pastor should strive to settle problems if possible. If these attempts fail, then a meeting with the dean should be arranged between the parties. If a solution is still not reached, then the Vicar for Clergy or other appropriate diocesan officials may be approached.

2° The Diocesan Bishop may refer matters that have been brought to his attention to a dean to investigate, resolve and/or make recommendations.

§11. *As Investigator:* In the case of an illness or impairment of a priest, the dean should investigate and attempt to address any pastoral needs and/or make recommendations to the Vicar for Clergy or other diocesan official as the case warrants.

1° When a pastor is unable to serve his parish due to illness, it is the dean's responsibility either to find a replacement or to notify the Vicar General.

2° In the case of a problem in a parish or school, or a similar situation, the dean may investigate on his own authority and attempt to resolve it, always reporting to the Diocesan Bishop and the Superintendent of Schools as appropriate.

§12. *As Friend:* If a priest is having personal problems, the dean, on his own initiative, may offer his service to help the individual.

§13. *As Helper:* A dean may also be called upon to assist the Diocesan Bishop and the priests. The proper dean shall be informed when a pastor without a parochial vicar or resident priest will be absent from his parish for more than two (2) days. The dean is to be told where the pastor may be reached in an emergency. The pastor himself is responsible to secure another priest to provide for emergencies and funerals and to make the arrangements known to the dean. A secretary or someone known to other parishioners as a contact should also know how to contact the priest filling in for the priest in emergencies and funerals.

§14. *A Dean in his Relationship with People:* A dean is responsible for monitoring and facilitating diocesan programs on the deanery level.

Appendix B – CONSTITUTION OF THE PRESBYTERAL COUNCIL AND THE STATUTES OF THE COLLEGE OF CONSULTORS

CONSTITUTION OF THE PRESBYTERAL COUNCIL

PREAMBLE

The ministry of the Lord Jesus has been entrusted in a unique way to the Diocesan Bishop, who acts in the person of Jesus as teacher, shepherd and high priest of the diocesan church. The priests of a diocese constitute one priesthood with their bishop and are his co-workers; their ministry derives from his as they gather God's family into one and lead it in the Spirit, through Christ, to the Father. The bishop invites the help and counsel of his priests in the governance of his diocese and he exercises his ministry as their pastor and friend. Conscious of priestly responsibility to the Diocese and the communion of the Catholic Church; aware of the bonds of fraternity among the bishop and all priests, diocesan and members of institutes of consecrated life and societies of apostolic life; seeking to strengthen and promote the bond of unity and affection among all the people of God; mindful of the call of the Second Vatican Council and in conformity with the 1983 Code of Canon Law; the bishop in collaboration with the priests of the Diocese of Alexandria, hereby establishes the Presbyteral Council of the Diocese (c. 495, §1).

ARTICLE I: NAME

The name of this body shall be "The Presbyteral Council of the Diocese of Alexandria", hereafter referred to as the Council.

ARTICLE II: PURPOSE

The purpose of the Council shall be:

- 1° To foster the spiritual, intellectual and material welfare of priests so that they can fulfill their ministry faithfully and fruitfully;
- 2° To aid the bishop in the governance of the Diocese through consultation and collaboration;
- 3° To provide a forum for the full and free discussion of any and all issues of pastoral concern for the good of the Diocese;
- 4° To search for and to propose ways and means of promoting effective pastoral ministry;
- 5° To be representative of the unity and diversity of the priests of the Diocese;
- 6° To acknowledge and promote the dignity of the clergy, religious and laity and the role which is proper to each in the mission of the Church;

ARTICLE III: CONSULTATIVE PROCESS

§1. The Council enjoys a consultative, not deliberative voice; the Diocesan Bishop listens to its advice or recommendation, but he needs its formal consent only in cases expressly defined by law (c. 500, §2; 127, §2. The major instances in which consultation is required are as follows:

- 1° The advisability of a diocesan synod (c. 461, §1)

- 2° The modification of parishes, e.g., their erection, modification, division or suppression (c. 515, §2)
- 3° The determination of the use of offerings of the faithful made on the occasion of parish services and placed in a general parish fund (c. 531)
- 4° The appropriateness and effective mission of parish pastoral Councils (c. 536, §1)
- 5° The granting of permission to build a church (c. 1215, §2)
- 6° The granting of permission for a church to be converted to secular purposes for reasons other than its poor condition (c. 1222, §2)
- 7° The imposition of a tax for the needs of the Diocese on public juridic persons subject to the bishop; also the imposition of an extraordinary and moderate tax for very grave needs on other juridic persons and on physical persons (c. 1263)
- 8° The selection of pastors for consultation in cases of removal and transfer of pastor (c. 1742)
- 9° Any other instances as defined by law.

ARTICLE IV: MEMBERSHIP

§1. The membership shall consist of elected members, ex-officio members and appointed members.

§2.1. Eight (8) members shall be elected each for a term of three (3) years or until their successors assume office. Terms shall be staggered by the drawing of lots in the first election so that three (3) shall serve three years, three (3) for two years, and two (2) for one year.

§2.2. The following are electors (have the right to vote) of members of the Council:

1° All diocesan priests incardinated in the Diocese even if they live outside the Diocese or have retired unless prohibited by the Diocesan Bishop;

2° Diocesan priests not incardinated in the Diocese, and priests who are members of an institute of consecrated life or a society of apostolic life; they also must be assigned to an office by the Diocesan Bishop. (Priests who merely reside in the Diocese, even if they assist in parishes and enjoy some of the faculties of the Diocese, but do not hold an assignment from the Diocesan Bishop are not eligible to vote or be elected.)

§2.3. Only those priests actually residing within the Diocese and who have a right to vote are eligible for election. Elections shall be held in April of each year. The election shall be by mail ballot with all priests eligible for election listed. The term of office begins on July 1st following the election. Those elected do not need confirmation.

§2.4. Three (3) tellers shall serve the Council. One (1) shall be elected each year from among those who are newly elected or appointed to terms of three (3) years. A teller is elected to a term of three (3) years. In the first election however, one person must be elected from each group having respectively three (3), two (2) and one (1) years remaining in their terms on the Council; the terms of the first tellers shall then equal to their respective remaining terms on the Council.

§2.5. Election of Members:

1° The manner of election shall be by weighted ballot.

2° Each elector shall be instructed to vote for the number of vacancies to be filled in the order of his preference, assigning the number one to his first choice and the number two to his second preference etc. No one may “tie” a vote or vote for more persons than there are vacancies.

3° Each elector is to be reminded that voting for only one person with the hope that he may have a better chance of election may, in fact, have less of a chance for that reason. Such a ballot is valid, however.

4° The three (3) tellers shall tally the votes assigning as the value to each first choice, the total number of vacancies, then, as the value to each second preference, one less than the total number of vacancies etc. to deliver the weighted votes for each candidate.

5° Those persons receiving the highest total weighted votes, in order highest to lowest, shall be declared the winners of the vacant seats. If there is a tie, it is decided by the greatest number of years of ordination and secondarily by lot.

§2.6. All eligible priests are expected to serve if elected. Exceptions must be approved by the Diocesan Bishop.

§3. The Vicar General *ex-officio* shall be a member with vote.

§4. No more than eight (8) members may be appointed by the Diocesan Bishop for a term of three (3) years, which can be renewed upon expiration at the discretion of the bishop. The initial appointment shall be terms of three (3) and two (2) years. The vacancy of any appointed member’s seat may be filled by an appointment by the Diocesan Bishop for the unexpired portion of the term. The term of office ordinarily begins on July 1 except in the case of vacancies mentioned above.

§5. Regular participation constitutes a serious responsibility. Repeatedly unexcused absences are a disservice to the Council and upon the recommendation of the Council; the Diocesan Bishop may declare a seat vacant. The vacancy may be filled according to the procedure above.

ARTICLE V: OFFICERS

§1. The executive officers of the Council shall be the Chairman, the Vice-Chairman and the Secretary.

§2. The Diocesan Bishop shall convoke the Council, preside over it and determine the questions to be treated by it or to receive proposals from its members (c. 500, §1). Suggested agenda items should be forwarded to one of the officers one (1) month prior to the next meeting for discussion with the Diocesan Bishop.

§3. The Chairman shall conduct the meetings of the Council, shall be the chief executive officer of the Council, and shall have the duties prescribed for this office by the parliamentary authority and by such standing rules as the Council shall adopt.

§4. The Vice-Chairman and the Secretary shall have the duties prescribed for their respective offices by the parliamentary authority and by such standing rules as the Council shall adopt.

§5. The executive officers shall be elected by and from among the members of the Council annually at the September meeting, for a term of one year or until their successors are elected. No member shall hold more than one office, or be re-elected to the same office for more than two (2) consecutive terms. In the event of a vacancy in an elected office, the Council shall elect an officer to fill the unexpired portion of the term.

ARTICLE VI: MEETINGS

§1. The Council shall meet not less often than quarterly on an annual schedule to be adopted by the Council and approved by the Diocesan Bishop.

§2. A majority of the current members shall constitute a quorum.

§3. The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the Council in all cases to which they are applicable and in which they are not inconsistent with canon law, this Constitution, and any special rules of order the Council may adopt.

ARTICLE VII: COMMITTEES

The Council shall have the power to constitute committees at its discretion and they shall have the rights and duties that the Council shall specify from time to time. The Council shall appoint the committee heads and they, in turn, shall appoint the members unless other procedures are determined by the Council itself. Unless specified otherwise, committee members need not be members of the Council or priests.

ARTICLE VIII: AMENDMENTS

Amendments to this Constitution are made at the discretion of the Diocesan Bishop alone and not his equivalent in office.

ARTICLE IX: CESSATION

1° *Sede Vacante* (when the See is vacant) The Council ceases until the next Diocesan Bishop reconstitutes it within a year (c. 501, §2).

2° The Diocesan Bishop may dissolve the Council if it gravely abuses its function after consulting the Metropolitan; yet it is to be reconstituted within a year (c. 501, §3).

THE COLLEGE OF CONSULTORS

STATUTES

ARTICLE I: Membership

(cf. can. 502, §1, of the *Code of Canon Law*)

§1. The College of Consultors of the Diocese of Alexandria is that specific group of six (6) to twelve (12) presbyters chosen by the Diocesan Bishop for this purpose from among the members of the Presbyteral Council at the time of the constitution of the College.

§2. As a canonical College the group is established as an aggregate of persons (cf. can. 94, §2) for a five-year term, such that these, its statutes, constitute its lawful statutes (*Ibid.*, §1 and §3).

§3. Members of the College are not changed or replaced during the term of the College unless by exception (cf. AAS 76 [1984] 747).

ARTICLE II: Presidency and Convocation

(cf. can. 502, §2)

§1. When the local See is filled, the Diocesan Bishop presides over the College, and is solely competent to convoke it. At a meeting properly convoked by the Diocesan Bishop, he may delegate a member of the College of Consultors to chair the meeting on that occasion, even in the bishop's absence.

§2. When the local See is vacant, the one who temporarily takes the place of the Diocesan Bishop or, if he has not yet been constituted as such, the member of the College of Consultors who is senior in priestly ordination presides over it. During the vacancy of the See, not only this local president but also the Metropolitan Archbishop of the Province of New Orleans, and the Apostolic Nuncio in the United States are also specifically competent to convoke a meeting of the College of Consultors and preside over it personally or through a delegate. At such a meeting properly convoked, the one who presides may delegate another member of the College of Consultors to chair the meeting, even in the absence of the convoking authority.

ARTICLE III: Meetings and Voting

§1. The College of Consultors shall meet solely at the time and place determined by the one who presides over it.

§2. At meetings of the College of Consultors decisions may be taken by voice vote, unless the one presiding determines that a recorded vote is necessary.

§3. When consent is needed by the one who presides over the College of Consultors to act, the one presiding may not vote, even to break a tie (cf. AAS 77 [1985], p. 771).

§4. In accord with canon 127, §1, when universal law requires *consent*, there must be a *meeting* of the Consultors called in accord with canon 166 and consent of a majority of the members present obtained for validity (cc. 124; 127, §1), except as indicated in §5 of this Article.

1° When *counsel* only is required, such counsel may be taken individually in person, by phone or by mail; counsel either individually or collectively must be taken for validity (cc. 124; 127, §1, §2, 2°).

2° For validity all such acts must be documented in writing, signed by the Diocesan Bishop and duly notarized (c. 474).

§5. When consent of the College of Consultors is required by law and involves a matter regarding temporal goods (e.g., alienation, extraordinary administration) belonging to a subordinate juridic person subject to the authority of the Diocesan Bishop and valued at less than \$100,000, such consent may be accomplished outside of a meeting, by mail or other certain means of communication and voting, unless the one who presides over the College of Consultors or any member of the College determines that a meeting for this purpose is necessary. A reasonable peremptory time-limit is to be established by the one who presides for the necessary accomplishment of the vote. A majority of the members must respond before the expiry of the peremptory time limit for the vote to be valid; in the absence of a valid vote a meeting for that purpose is to be convoked as soon as possible.

§6. In every situation wherein consultation and/or consent of the College of Consultors is required by law, copies of the full documentation and other resources necessary for the proper exercise of the College's function is to be provided at least by electronic means by the one who presides in a timely manner, prior to the meeting if at all possible.

ARTICLE IV: Records

§1. The one who presides over the College of Consultors or the delegated member of the College who chairs a meeting of it shall appoint a member of the College to serve as recorder for each meeting and other activity of the College outside of a meeting, such that proper records of these proceedings are retained.

§2. The ordinary acts of the College of Consultors are recorded in a special book kept in the Archives of the Diocesan Chancery.

§3. Extraordinary acts of the College of Consultors may also be recorded and published elsewhere with the consent of the College of Consultors by the one who presides over it.

§4. Confidentiality as regards the discussions and/or actions of the College of Consultors may be required due "to the seriousness of the matter" or otherwise imposed by the one who presides over the College (cf. can. 127, §3).

ARTICLE V: Functions

When there is a Diocesan Bishop, the College of Consultors is to exercise solely those various functions prescribed by law:

§1. The Diocesan Bishop needs the consent of the College of Consultors and that of the Diocesan Finance Council in order to perform acts of extraordinary administration besides cases specifically mentioned in universal law or in the charter of a foundation. In accord with the norms of canon 1277, the National Conference of Catholic Bishops determined that the following are to be considered acts of extraordinary administration and therefore subject to the limits of canons that regulate such acts (Approved: General Meeting, November 1985; Promulgated: Memorandum to All Bishops, June 27, 1986).

1° To alienate (in the strict sense, convey or transfer ownership) goods of the stable patrimony when the value exceeds the minimum limit (c. 1292§1).

2° To alienate goods donated to the Church through a vow, or to alienate goods that are especially valuable due to their artistic or historical value regardless of the appraised value (c. 1292§2).

3° To incur indebtedness (without corresponding increase in the assets of the Diocese) that exceeds the minimum limit (c. 1295).

4° To encumber stable patrimony the value of which exceeds the minimum limit (c. 1295).

5° To lease ecclesiastical goods owned by the Diocese, the Diocesan Bishop must obtain the consent of the Diocesan Finance Council and the College of Consultors when the market value of the property to be leased exceeds \$1,000,000 or the lease is to be for 3 years or longer (c. 1297).

6° To lease ecclesiastical goods by any public juridic person requires the consent of the Holy See when the market value of the goods exceeds \$5,000,000 (Approved on November 13, 2002, United States Conference of Catholic Bishops as complementary legislation for canon 1297; granted *recognitio* by the Congregation for Bishops May 2, 2007).

§2. The Diocesan Bishop must consult the Diocesan Finance Council and the College of Consultors in order to perform the more important acts of administration in light of the economic situation of the Diocese in the following matters:

1° Appointment and removal of the finance officer (cc. 494, §§1-2; 423)

2° Imposing taxes on physical and juridic persons (c. 1263)

3° Implementing of more important administrative acts in light of the economic condition of the Diocese (c.1277)

4° Determining the meaning of acts of extraordinary administration for institutes subject to the Diocesan Bishop's control, if not specified in the statutes (c. 1281, §2)

5° Authorizing the placing of money and movable goods in a safe place and investing them (c. 1305)

6° Reducing the burdens imposed in executing last wills for pious causes if such burdens cannot be fulfilled (c. 1310, §2).

7° Leasing ecclesiastical goods owned by the Diocese when the market value of the goods to be leased exceeds \$400,000 (c. 1207)

8° Leasing ecclesiastical goods owned by a parish when the market value of the goods to be leased exceeds \$100,000 or the lease is to be for 1 year or longer (Approved on November 13, 2002, United States Conference of Catholic Bishops as complementary legislation for canon 1297; granted *recognitio* by the Congregation for Bishops May 2, 2007).

§3. Together with the Diocesan Bishop, the College of Consultors officially receives the letter of appointment of a coadjutor bishop, ideally at a public liturgy (cf. can. 404, §1).

§4. The College of Consultors may be requested or required to give counsel on any other matter, especially those of greater importance, as determined by the Diocesan Bishop.

When the See is canonically impeded, the Diocesan Bishop is unable to communicate with the Diocese even by letter:

§1. The College of Consultors is immediately to ensure that both the Apostolic Nuncio and the Metropolitan Archbishop of New Orleans have been informed of the situation (cf. can. 413, §3 and the parallel in can. 422).

§2. The College of Consultors is to elect a diocesan administrator, and this action is to take place only if no other provision has been made (cf. can. 413, §2).

§3. During the time the local See is canonically impeded, the College of Consultors shall function as if the local See were vacant, as in the next section below.

When the local See is vacant:

§1. If there is no auxiliary bishop, the College of Consultors is immediately to inform the Apostolic Nuncio of the local See's vacancy (cf. can. 422).

§2. Until there is an administrator, if there is no auxiliary bishop or other provision by the Holy See, the College of Consultors governs the diocese collegially (can. 419).

§3. Should an apostolic administrator be appointed, and unless the Holy See shall determine otherwise, the College of Consultors shall function as if there were a diocesan bishop, as above.

§4. But should the Holy See not make other provision, the College of Consultors is to elect a diocesan administrator within eight days of the local See's vacancy (cf. can. 421, §1).

§5. The College of Consultors is to witness the diocesan administrator's profession of faith (cf. can. 833, 4°).

§6. The consent of an absolute majority of the College of Consultors is needed in order for the diocesan administrator to:

1° Remove the chancellor(s) or other notaries (cf. can. 485).

2° Issue dimissorial letters for the secular clergy (cf. can. 1018, §1, 2°).

3° Incardinate, excardinate, or permit the migration of clerics to another diocese, but only if the local See has been vacant a year (cf. can. 272).

§7. The College of Consultors fulfills the role of a presbyteral council, which ceases to exist (cf. can. 501, §2), especially in those areas of required consultation which may due to exceptional circumstances arise (e.g., cann. 515, §2 and 1222, §2).

§8. At least some members of the College of Consultors are to be consulted by the papal legate regarding the provision of a new diocesan or coadjutor bishop (cf. can. 377, §3).

§9. The College of Consultors officially receives the letter of appointment of the new Diocesan Bishop, ideally at a public liturgy (cf. can. 382, §§3-4).

§10. The College of Consultors may be requested or required to give counsel on any other matter, especially those of greater importance, as determined by the diocesan administrator.

ARTICLE VI: Amendment

These Statutes are amended solely by legislative decree of the Diocesan Bishop.

Appendix C – PARISH FINANCE COUNCIL PROCEDURE

§1. **RESPONSIBILITIES:** A parish finance council is required by universal law and aids the pastor in the administration of parish goods. A pastor is responsible to see to it that the goods of the parish are administered in accord with the norms of law (c. 532).

§2. A pastor acts invalidly if he does not listen to his finance council when either universal or particular law requires its counsel or consent. He in no way is obliged to accede to its recommendations but should not act contrary to a consensus unless there is a serious reason that in his judgment, justifies or requires such action. It is organized as an agency of the parish pastoral council.

§3. A council is not a board of directors, nor does it serve only on occasion for the convenience of the pastor, nor does it simply affirm what has already been determined. Recommendations of a parish finance council shall be submitted to the pastor and the parish pastoral council.

§4. **MEMBERSHIP:**

1° Members should be:

– Catholics who are active registered members of the parish

– skilled in financial matters, civil law, management or other skills or expertise needed by the Parish

– outstanding in character

– unrelated to the Diocesan Bishop or the proper pastor

– open to additional and specialized training

– available for service.

2° Members may include registered parishioners of either sex and without prejudice to racial or ethnic origin. A council consists of at least five (5) members including the trustees (see below). They are appointed by the pastor.

3° Terms of membership for non-trustees

– are for five (5) years, with five (5) year renewal;

– begin on first day of the fiscal year;

– should be rotated.

§5. A parish's trustees must be appointed members of their proper parish finance council. They are *ex-officio* with vote. They must meet all the requirements of Art. 2000, §6.

§6. Except for the one ex-officio member, members of a parish finance council shall not be members of the parish pastoral council. Exceptions could be made with the approval of the Diocesan Bishop.

§7. A pastor presides at meetings of a parish finance council and is an ex-officio member without vote. Those assigned to Church office by the Diocesan Bishop and other employees designated by the proper pastor in a parish are also ex-officio members without vote.

§8. Officers of a parish finance council shall include a chairperson who must have attended diocesan training or have completed it within one year of election. The chair usually conducts the meetings. Other officers may be a vice chairperson and a secretary. An executive committee consisting of the proper pastor and parish pastoral council officers, through consultation, will propose the agenda for each meeting.

§9. FUNCTIONS:

1° Assists in preparing an annual budget and submits it to the pastor and parish pastoral council

2° Carefully complies with all of *Diocesan Policy* Art. 2025 and especially assures that: a) parishioners and school families as well as the pastoral council and school advisory council receives the reports required in §6 in a timely manner; b) the statements of contributions to donors required by the IRS and particular law in §7 are mailed annually in January

3° Develops guidelines for parish business manager, salaried or volunteer, if there is one

4° Provides guidelines, job descriptions and assistance for the employment or termination of the parish business manager

5° Reviews financial reports of various parish organizations, projects, activities, etc and assists in offering financial and management advice and insures adequate and practical accountability and audits

6° Offers the pastor and the business manager counsel in the significant financial issues

7° Provides oversight in the administration of assets, especially their disposition and acquisition

8° Together with the pastor, oversees all projects of construction, expansion and reconstruction or demolition, referring all extraordinary administrative acts to the office of the Diocesan Bishop with a recommendation

9° Offers counsel and monitors all the parish's investments, savings, special funds, and wills and bequests

10° Offers counsel and assists the pastor in conducting the fund-raising activities needed in the parish so that its members can fully participate as stewards

11° Assists the pastor with helpful information pertaining to contracts, warranties, taxes, personnel policies or practices, bidding procedures, security, etc

12° Cooperates with the person appointed by the Diocesan Bishop who directs the diocesan legal counsel in instances of civil litigation.

§10. RELATIONSHIP OF PARISH FINANCE COUNCIL AND OTHER CHURCH ORGANIZATIONS: The parish pastoral council has the more general responsibility of collaborating with the pastor in terms of examining pastoral activities, discerning the needs of the apostolate, developing the written pastoral plan for apostolic action, and reviewing, evaluating and reporting the outcomes of the pastoral plan and activities.

§11. It is expected that the pastor and parish pastoral council will offer to the parish finance council the proposed written parish plan in a sufficient amount of time prior to the new fiscal year requesting that a parish budget be developed. The parish finance council collaborates with the various parish staff members, the parish pastoral council, the pastor and other appropriate

parties for the development of the new parish budget. Parish priorities are set by the pastor and parish pastoral council.

§12. The parish finance council is available as an informational resource to the parish pastoral council throughout the year. Together with the pastor, it provides the parish pastoral council with regular and adequate financial reports.

§13. *OTHER PARISH ORGANIZATIONS:* The parish finance council assists other parish organizations in the development of their annual budgets and reviews their regular financial reports. All organizations and activities in the parish, whether using the same tax payer identification number or not, but enjoying the privilege of the tax-exempt status offered the Catholic Church in the annual IRS Group Ruling, are subject to having their financial activities reviewed by the parish finance council and reported thereby (See *Diocesan Policy* Art. 2100).

§14. *DIOCESAN FINANCE COUNCIL:* The parish finance council has the Diocesan Finance Council and Diocesan Finance Officer who provide information, review and oversight of parish finance councils as one of its greatest resources. The acts of extra-ordinary administration, e.g., expenditures requiring the permission of the Diocesan Bishop must be presented in accord with *Diocesan Policy* Art. 2020, §4.

§15. *STANDARDS OF PERFORMANCE:* All administrators (c. 1284) are bound to fulfill their office with the diligence of a good householder, which essentially means that, with the aid of the parish finance councils, they must:

1° ensure that none of the goods entrusted to their care is in any way lost or damaged and take out insurance policies for this purpose, insofar as such is necessary or possible;

2° ensure that the ownership of ecclesiastical goods is safeguarded through civilly valid and legal methods;

3° observe the prescriptions of both canon law and civil law or those imposed by the founder, donor or legitimate authority; they must especially be vigilant lest the Church be harmed through the non-observance of civil laws;

4° accurately collect the revenues and income when they are legally due, safeguard them once collected and apply them according to the intention of the donor or according to established legal norms;

5° pay the interest on any loan or mortgage when it is due and take care that the capital debt itself is repaid on schedule;

6° with the consent of the Diocesan Bishop, invest excess funds after expenses that can be profitably used for the goals of the institution;

7° keep accurate receipts and expenditures;

8° provide a report on their administration at the end of each year;

9° arrange and safeguard the documents and deeds of the church or the institution; forward authentic copies of them in the archives of the Diocese;

10° assist and collaborate with the parish finance council in the development of the annual parish budget.

11° neither initiate nor contest a lawsuit on behalf of a the institution in civil court unless they obtain the written permission of the Diocesan Bishop (c. 1288);

12° even though not bound to administration by ecclesiastical office, administrators cannot relinquish their responsibilities on their own initiative; if, however, the Church is harmed by an arbitrary abandonment of duty, the administrator is bound to restitution (c. 1289);

13° render an account to the faithful concerning the contributions of the faithful to the Church (c. 1287, §2);

§16. In practice, these functions mean that the following:

1° Administrators of parish programs, organizations, schools, projects, etc. are accountable to their respective boards or councils and to the pastor of the parish, or the one equivalent in law.

2° The pastor, or the one equivalent in law, is accountable along with the parish finance council to the Diocesan Bishop.

3° The Diocesan Bishop, together with the Diocesan Finance Council, Presbyteral Council and College of Consultors is accountable to the Holy See.

Appendix D – DIOCESAN FINANCE COUNCIL

CONSTITUTION

ARTICLE I: NAME

The name of this body shall be the “DIOCESAN FINANCE COUNCIL.”

ARTICLE II: PURPOSE AND SCOPE

§1. The Diocesan Finance Council approves the annual financial statement of the Diocese and approves the annual diocesan budget according to the directions of the Diocesan Bishop.

§2. The Diocesan Finance Council should be available to give consent or for consultation in various administrative decisions of a financial character; especially but not exclusively specified in Code of Canon Law (c. 493).

§3. The diocesan bishop needs the consent of this Council and that of the College of Consultors in order to perform acts of extraordinary administration besides cases specifically mentioned in universal law or in the charter of a foundation. In accord with the norms of canon 1277, the National Conference of Catholic Bishops determined that the following are to be considered acts of extraordinary administration and therefore subject to the limits of canons that regulate such acts. (Approved: General Meeting, November 1985; Promulgated: Memorandum to All Bishops, June 27, 1986)

1° To alienate (in the strict sense, convey or transfer ownership) goods of the stable patrimony when the value exceeds the minimum limit (c. 1292§1).

2° To alienate goods donated to the Church through a vow, or to alienate goods that are especially valuable due to their artistic or historical value regardless of the appraised value (c. 1292§2).

3° To incur indebtedness (without corresponding increase in the assets of the Diocese) that exceeds the minimum limit (c. 1295).

4° To encumber stable patrimony the value of which exceeds the minimum limit (c. 1295).

5° To lease ecclesiastical goods owned by the Diocese, the Diocesan Bishop must obtain the consent of the Diocesan Finance Council and the College of Consultors when the market value of the property to be leased exceeds \$1,000,000 or the lease is to be for 3 years or longer (c. 1297).

6° To lease ecclesiastical goods by any public juridic person requires the consent of the Holy See when the market value of the goods exceeds \$5,000,000 (Approved on November 13, 2002, United States Conference of Catholic Bishops as complementary legislation for canon 1297; granted *recognitio* by the Congregation for Bishops May 2, 2007).

§4. The Diocesan Bishop must hear the Diocesan Finance Council and the College of Consultors in order to perform the more important acts of administration in light of the economic situation of the Diocese in the following matters:

1° Appointment and removal of the finance officer (cc. 494, §§1-2; 423)

2° Imposing taxes on physical and juridic persons (c. 1263)

3° Implementing of more important administrative acts in light of the economic condition of the Diocese (c.1277)

4° Determining the meaning of acts of extraordinary administration for institutes subject to the Diocesan Bishop's control, if not specified in the statutes (c. 1281, §2)

5° Authorizing the placing of money and movable goods in a safe place and investing them (c. 1305)

6° Reducing the burdens imposed in executing last wills for pious causes if such burdens cannot be fulfilled (c. 1310, §2)

7° Leasing ecclesiastical goods owned by the Diocese when the market value of the goods to be leased exceeds \$400,000 (c. 1207)

8° Leasing ecclesiastical goods owned by a parish when the market value of the goods to be leased exceeds \$100,000 or the lease is to be for 1 year or longer (Approved on November 13, 2002, United States Conference of Catholic Bishops as complementary legislation for canon 1297; granted *recognitio* by the Congregation for Bishops May 2, 2007).

§5. In accord with canon 127, §1, when universal law requires *consent*, there must be a *meeting* of the Council called in accord with canon 166 and consent of a majority of the members present obtained for validity (cc. 124; 127, §1).

1° When *counsel* only is required, such counsel may be taken individually in person, by phone or by mail; counsel either individually or collectively must be taken for validity (cc. 124; 127, §1, §2, 2°).

2° For validity all such acts must be documented in writing, signed by the Diocesan Bishop and duly notarized (c. 474).

ARTICLE III: MEMBERSHIP

§1. The Diocesan Bishop freely confers membership in the Council upon at least three (3) of the Christian faithful (Catholics) who are clerics or lay persons skilled in financial matters and/or civil law, outstanding in character and not related to himself closer than the fourth degree of consanguinity or affinity (cc. 108; 109; 492, §1, §3)

§2. Members are to be named for a five (5) year term, except when appointed to fill an unexpired term.

§3. The Moderator of the Curia serves as Executive Secretary of the Council, and is a voting member.

ARTICLE IV: MEETINGS

§1. Meetings of the Council will ordinarily be held monthly. Special meetings may be called by the Chairperson or the Diocesan Bishop. Meetings shall be called in accord with canon 166.

§2. A majority of the members of the Council shall constitute a quorum. If a quorum is present, a majority vote of those present shall be sufficient for any action of the Council.

§3. The Executive Secretary shall ensure that minutes of each meeting are recorded and presented to the Diocesan Bishop and the members of the Council.

ARTICLE V: OFFICERS

The officers of the Council shall be the Chairperson who conducts the meeting, Vice-Chairperson, elected annually in December to take office in January, and the Executive Secretary.

ARTICLE VI: AMENDMENT

The Council shall have the authority to amend this Constitution only with the consent of the Bishop of Alexandria and two-thirds of those present at a duly called meeting. No such resolution may come for a vote without one (1) month prior written notice to the members of the Council. The Diocesan Bishop on his own authority may amend this Constitution.

Appendix E – CHEMICAL DEPENDENCY PROCEDURES

§1. The purposes of these procedures are:

- 1° to relieve pain and suffering and to restore the health and dignity of person to those members of the clergy who suffer from the disease;
- 2° to attempt to return clergy to a productive, happy and rewarding ministry in the Diocese.

§2. Clergy who become aware of a problem of chemical dependency may call on the Vicar for Clergy or the Diocesan Bishop for help for himself or another member of the clergy with assurance of confidentiality and without fear of prejudice. Anyone may express their concerns in this area to the Vicar for Clergy or the Diocesan Bishop.

§3. **PROCEDURES: Identification of a problem:** chemical dependency exists when the individual's consumption of mood altering chemicals (alcohol, other drugs, e.g. cocaine, crack, marijuana) repeatedly

- 1° impairs his interpersonal relationship with clergy and laity;
- 2° interferes with the performance of his assigned duties, priestly commitment or ministry;
- 3° reduces his dependability;
- 4° affects his physical, spiritual, or mental health;
- 5° reflects discredit on his clerical office or ministry.
- 6° The problem is *not* determined by either the amount or the frequency of usage, but rather its *effect* on an individual's behavior or function.

§4. **Intervention:** The chemically dependent are seldom able to diagnose their own condition and, of their own will, volunteer or seek treatment. Intervention will often be necessary. Intervention is not confrontation. Intervention, will usually, be an exercise of *constructive persuasion* that is done out of true concern. The chemically dependent person needs help whether he wants help or not.

1° Since addiction is a *progressive* and irreversible illness (it becomes worse and not better), *early* intervention and treatment are most important and effective.

2° It is strongly recommended that no cleric undertake a personal intervention with a fellow priest without first discussing the matter with the Vicar for Clergy. This is required for the protection of the individual and the assurance of sound evidence being presented. Discretion must be observed in all cases.

3° Those who intervene must have knowledge of *specific facts and events* that point to the existence of a real dependency;

4° Facts must indicate continuing abuse.

5° Discretion is essential because chemical dependency is a sickness and not a moral disorder;

6° Proper treatment for a sick person does not interpret intervention as an accusation of a moral evil.

§5. *Treatment:* Treatment is determined in each case and depends on such factors as a) duration, b) degree of impairment, c) physical and psychological complications, d) social and vocational complications and e) insight and motivation.

1° Effective treatment usually takes place in two phases: a) the immediate and short term; entailing detoxification and physical stabilization; and b) the long term during which the individual is helped to renew his value system and embrace a new life style enabling him to live without chemical dependency.

2° The specific treatment program will be determined by a qualified professional.

§6. *Post-Therapy Considerations.* Upon satisfactory completion of treatment, the priest is given full and equitable consideration in matters of assignment. Every cleric's assignment is based on the needs of the Diocese and the capabilities of the individual. Consideration should be given to the availability of recognized support groups. Additionally, proximity to other clergy who suffer from the same illness should be considered.

Appendix F – Celebration of Confirmation (*Diocesan Policy Art. 1020, §5*)

§1. The celebration of the sacrament of confirmation is a significant moment in the life of the parish. It is important that the liturgy be carefully and appropriately prepared. The pastor or his delegate is to complete the attached planning sheet and return to the Office of the Bishop no later than two weeks before the liturgy. Please remember that it is not required to have a large group to schedule Confirmation. A single candidate, even in a mission church, is sufficient and scheduling it in that community is strongly encouraged.

§2. The liturgy is to be celebrated according to the Rite of Confirmation. Ceremonies not included in the liturgical Rite of Confirmation, such as the distribution of individual certificates after the anointing with chrism, or other non-liturgical devotional rites, are not permitted. They distract and detract from the rich ritual of the sacrament itself and unduly prolong the liturgy.

§3. It is strongly recommended that the use of Confirmation “stoles” NOT be used. This practice can create confusion because a stole is the proper vestment for the ordained (deacons, priests, bishops). In parishes that have used this in the past, please discontinue the practice.

§4. Glory to God: If the Mass does not take place on a Sunday or solemnity when the *Glory to God* is required, then it is omitted.

§5. Scripture Reading and Liturgical prayers: Within the Octaves of Christmas and Easter, on Solemnities, and on Sundays during the seasons of Advent, Christmas, Lent and Easter, the Mass and readings of that day must be used. It is preferred that on all Sundays the readings and the liturgy of the Sunday be used. On other weekdays, the Mass of Confirmation will be used and the readings are to be selected from the Lectionary for the Ritual Mass of Confirmation. The preface will be one of the Prefaces of the Holy Spirit. The bishop will select the Eucharistic Prayer.

§6. Liturgical Items: The bishop will ordinarily bring: Chrism in its stock, Ritual of Confirmation, miter and crozier / pastoral staff (with stand), alb and chasuble. Two additional servers may be assigned to hold the miter and pastoral staff. These two servers walk behind the bishop in both the entrance and recessional processions.

§7. Photography: Photos (videotape or still) may be taken *in moderation* during the liturgy. A group photo and/or individual photos of the newly confirmed with the Bishop may be taken following the liturgy.

§8. Proclamation of the Gospel: A deacon, if the parish enjoys the ministry of one, will proclaim the Gospel. If no deacon is present, the pastor or another priest will proclaim the Gospel.

§9. Prior to the Ceremony: Before the Mass begins it would be helpful to have the candidates in a room, not in church, where the bishop may meet with them for about ten minutes before going to the church. This allows the bishop to be able to introduce himself to them before the celebration.

§10. Arrangements of Candidates in church: It is recommended that the candidates sit together in the church as a group; this makes it possible for the bishop to speak directly to them during the homily. If the pastor does not prefer this, then the candidates may be seated together with the sponsors next to them or in the pew directly behind them.

§11. Introductory Rites: The opening song accompanies the procession of the ministers to the sanctuary and should continue throughout the incensation of the altar, if incense is used. The song may continue even after the bishop has reached the chair, if this seems fitting. The candidates may enter the church in the procession before the ministers.

§12. The Rite of Blessing and Sprinkling with holy water is an option for use in place of the Rite of Penance, especially during the Easter Season. The Rite of Sprinkling and the Rite of Penance are never used in the same liturgy.

§13. The Liturgy of the Word: To demonstrate respect for the word of God, the readings are to be proclaimed from the Lectionary (and the Book of the Gospels, if available). No loose-leaf binders, worship aids, or photocopies are to be used. It is encouraged that candidates for confirmation serve as the readers, except for the Gospel as mentioned above. At the end of the Gospel reading, the book is brought to the bishop to be venerated.

THE RITE OF CONFIRMATION:

§14. Presentation of the Candidates: After the Gospel, the bishop is seated. The pastor, another member of the clergy, or a catechist presents the candidates for confirmation. Please note that it is a Rite of Presentation, not an introduction. The candidates are to stand at their places when presented. They may be introduced as a group, if the group is very large, or they may be introduced individually (recommended). They remain standing until the bishop instructs them to be seated. The homily follows.

§15. Renewal of Baptismal Promises: The renewal of baptismal promises is for the *candidates only*. They stand for the renewal, which takes the place of the Creed.

§16. Imposition of Hands: After the baptismal promises have been renewed, the concelebrants stand near the bishop and he will invite all present to pray for the candidates. After praying silently for a short time, the bishop alone lays hands upon all the candidates (by extending his hands over them), unless others priests will assist in anointing the candidates. In this case, the assisting priest(s) also extend their hands over the candidates. However, the bishop alone says the prayer. Then a chair is moved in front of the altar and the Rite of Anointing takes place.

§17. Anointing with Chrism: Once the chair is in place, the bishop goes to the chair for the anointing. During the anointing, the pastor stands at the bishop's right. A server brings the chrism to the bishop. Music, with or without singing, may accompany the anointing.

1° The candidate and sponsor approach the bishop. The candidate, sponsor, or pastor announces the name of the Confirmation candidate to the bishop. *No other dialogue is used.* Ordinarily, only the confirmation name is given. This may be the candidate's own name or that of a saint chosen for confirmation. The name may be printed on an index card instead of being spoken.

2° The bishop is seated in front of the altar for the anointing and each candidate kneels before him individually. The candidate should kneel on the same level as the bishop and directly in front of him. The sponsor places his/her right hand on the candidate's right shoulder. The newly confirmed answers *Amen* in response to the words of the Bishop during the anointing.

3° Because he is in the process of anointing, the bishop does not shake the candidate's hand, but says, "Peace be with you." The newly confirmed responds *And with your spirit*. Please note this is a changed response, bringing it into conformity with the text in the third edition of the *Roman Missal* that became effective the first Sunday of Advent 2011.

§18. General Intercessions: A deacon, or another person may offer the intercessions. Only one person offers the intercessions, unless they are proclaimed in different languages. Intercessions may be recited or sung. If there is no deacon, it is recommended that one of the newly confirmed read the intercessions. In formulating the intercessions or adapting existing ones, please be cognizant of who will be reading them. For example, if a newly confirmed is reading the intentions, they should be worded in such a way that it is not talking about the newly confirmed in the third person.

LITURGY OF THE EUCHARIST:

§19. At the presentation of the gifts, only bread and wine and the parish collection, if one is taken, are to be presented. If there are other items which are significant to those being confirmed, these items may be brought in during the entrance procession. They may *not* be included in the presentation of gifts, and they are never placed on the altar.

1° Sufficient bread and wine for all communicating at that liturgy should be prepared. If at all possible, the reserved sacrament from the tabernacle should *not* be used for the distribution of Holy Communion at the Mass. If the Eucharist is distributed under both species (encouraged), the additional chalices are placed on the altar during the presentation of gifts.

2° Ordinary ministers of the Eucharist (bishop, priests and deacons) are to serve as ministers of Holy Communion. Only if there are not enough ordinary ministers may extraordinary ministers of Holy Communion assist in the distribution of the Communion. All may receive Communion under both kinds in accord with the usual norms.

CONCLUDING RITES:

§20. Announcements: Announcements are made *after* the Prayer after Communion. This allows the Communion Rite to be completed before the Concluding Rite begins. It is ac-

ceptable, but not required, for the pastor to recognize other priests and/or deacons who are present, and to thank those who have been involved in the confirmation preparation and celebration.

§21. If a group photo is to be taken after Mass, the newly confirmed should remain in their places. If no photos are to be taken, the newly confirmed may precede the bishop in the recessional, or they may remain in their pews.

The follow Appendices are found under the next tab down:
Policies and Structures > Diocesan Policies > Forms in Diocesan Policy Appendices

Appendix G – Confirmation Liturgy Planning Sheet
(Diocesan Policy Art. 1020, §6)

Appendix H – RCIA Candidate’s Information Form
(Diocesan Policy Art. 1020, §7)

Appendix I – Episcopal Liturgy Planning Sheet
(Diocesan Policy Art. 1035, §2)

Appendix J – Notification of Matrimony
(Diocesan Policy Art. 1185, §1)

Appendix K – Notification of Death
(Diocesan Policy Art. 1185, §2)

Appendix L – Liability & Medical Release & Request to Participate Form
(Diocesan Policy Art. 1230, §5)

Appendix M – Ministry Report Form
(Diocesan Policy Art. 1100, §7)

Appendix N – Calculations for Clergy W-2 Form
(Diocesan Policy Art. 1100, §1)

These Appendices are found under the next tab down:
Policies and Structures > Diocesan Policies > Forms in Diocesan Policy Appendices

Effective June 7, 2012 the following were removed:

Art. 1000 – PARISH PASTORAL COUNCIL

§1. Each parish must have a parish pastoral council. In the parish pastoral council, which is presided over by the pastor, Christ's faithful, together with those who by virtue of their office are engaged in pastoral care in the parish, give their help in fostering pastoral action. The parish pastoral council has a consultative voice, and it is regulated by the norms laid down by the Diocesan Bishop.

§2. Responsibilities

1° Each parish is to establish a parish pastoral council to be conducted according to norms that are promulgated by the Diocesan Bishop.

2° The parish pastoral council is the principal consultative body of the parish for the pastor and to it all other boards, councils and committees shall be responsible.

3° Recommendations of the parish pastoral council shall be submitted in writing to the pastor. He in no way is obliged to accede to its recommendations, but he should not lightly disregard its counsel nor act contrary to a consensus unless there be a reason that in his judgment is overriding.

4° The parish pastoral council shall meet no less than quarterly.

§3. Membership and Offices

1° Members of the parish pastoral council should be Catholics who are active registered members of the parish. They must be those interested in overall parish wide development and spiritual growth of the parish.

2° Members may include both elected and appointed parishioners of either sex and without prejudice to racial or ethnic origin.

3° The recommended term for members is three years; renewable once.

4° One member of the parish finance council shall be an ex-officio member of the parish pastoral council.

5° Membership criteria include preparation for parish pastoral council ministry through diocesan and/or parish formation programs, study and prayer.

6° The pastor presides at meetings of the parish pastoral council and is an ex-officio member without vote. Those assigned to Church office by the Diocesan Bishop and other employees designated by the proper pastor in a parish are ex-officio members without vote.

7° Officers of a parish pastoral council, elected by the membership, should include a chairperson who conducts the meetings, a vice chairperson, and a secretary. An executive committee consisting of the proper pastor and parish pastoral council officers, through consultation, will propose the agenda for each meeting.

§4. The council's on-going agenda:

1° Update written parish mission statement (long term);

2° Evaluate and change goals, objectives and priorities in service (short term);

3° Review the annual budget and make recommendations to the pastor;

4° Promote meaningful dialogue and decision-making among the priests, religious and lay leaders of the parish;

5° Identify and encourage the use of gifts and talents of the members of the parish;

6° Assess, at least annually, the function and performance of the parish pastoral council itself.

Art. 2000 – PARISH FINANCE COUNCIL

§1. There is to be a parish finance council in every parish.

§2. The day-to-day operation of the business administration and finances of a parish/mission is the responsibility of its pastor and staff. A parish finance council deals primarily with those matters of greater moment as defined in law. It also assists the pastor in his supervisory and budgetary role as well as his overall fiscal needs and responsibilities.

§3. The term “pastor” refers to the one directly entrusted with the management of the parish including one who is appointed administrator, lay or clergy, with due regard for the rights of the one who is the proper pastor or endowed with the faculties of the proper pastor.

§4. A parish finance council is an agency of the parish pastoral council. The chair of the parish finance council or one of its members shall serve as an ex-officio member of the parish pastoral council.

§5. Each parish finance council shall be organized and function according to the guidelines set forth in Appendix C.

§6. **PARISH TRUSTEES:** Every parish must have two (2) laypersons as trustees of the parish according to their charters of incorporation (regardless of the number of mission churches). The proper pastor will present the names of the laypersons (who may be members of the mission churches) to the Diocesan Bishop. The Diocesan Bishop will appoint the trustees for a two (2) year period as stated in the charter. Trustees will be limited to two (2) successive, two (2) year terms or a period of four (4) years. After serving two (2) terms as trustees, a period of two (2) years must lapse before they may be again appointed. Terms run from July 1, for 24 months until the end of June 30.

§7. Trustees must be appointed members of their proper parish finance council. They serve ex-officio *with* the right to vote during their term(s) as trustees.

Appendix C – PARISH FINANCE COUNCIL PROCEDURE

§1. **RESPONSIBILITIES:** A parish finance council is required by universal law and aids the pastor in the administration of parish goods. A pastor is responsible to see to it that the goods of the parish are administered in accord with the norms of law (c. 532).

§2. A pastor acts invalidly if he does not listen to his finance council when either universal or particular law requires its counsel or consent. He in no way is obliged to accede to its recommendations but should not act contrary to a consensus unless there is a serious reason that in his judgment, justifies or requires such action. It is organized as an arm of the parish pastoral council.

§3. A council is not a board of directors, nor does it serve only on occasion for the convenience of the pastor, nor does it simply affirm what has already been determined. Recommendations of a parish finance council shall be submitted in writing to the pastor and the parish pastoral council.

§4. MEMBERSHIP:

1° Members are to be:

- practicing Catholics
- skilled in financial matters, civil law, management or other skills or expertise needed by the Parish
- outstanding in character
- unrelated to the Diocesan Bishop or the proper pastor
- open to additional and specialized training
- available for service.

2° Members may include registered parishioners of either sex and without prejudice to racial or ethnic origin. A council consists of at least five (5) members including the trustees (see below). They are appointed by the pastor.

3° Terms of office

- are for five (5) years, with five (5) year renewal;
- begin on first day of the fiscal year;
- should be rotated.

§5. A parish's trustees must be appointed members of their proper parish finance council. They are *ex-officio* with vote. They must meet all the requirements of the other members of a parish finance council.

§6. Except for the one *ex-officio* member, members of a parish finance council are not members of a parish pastoral council. Exceptions could be made with the approval of the Diocesan Bishop.

§7. A pastor presides at meetings of a parish finance council and is an ex-officio member without vote. Those assigned to Church office by the Diocesan Bishop and other employees designated by the proper pastor in a parish are also ex-officio members without vote.

§8. Officers of a parish finance council, elected by the membership, should include a chairperson who conducts the meetings, a vice chairperson, and a secretary.

§9. FUNCTIONS:

1° Assists in preparing an annual budget and submits it to the pastor and parish pastoral council

2° Submits a complete financial report at the end of the fiscal year to the parish pastoral council and parishioners

3° Develops guidelines for parish business manager, salaried or volunteer, if there is one

- 4° Provides guidelines, job descriptions and assistance for the employment or termination of the parish business manager
- 5° Reviews financial reports of various parish organizations, projects, activities, etc and assists in offering financial and management advice and ensures adequate and practical accountability and audits
- 6° Offers the pastor and the business manager counsel in the significant financial issues
- 7° Provides oversight in the administration of assets, especially their disposition and acquisition
- 8° Together with the pastor, oversees all projects of construction, expansion and reconstruction or demolition, referring all extraordinary administrative acts to the office of the Diocesan Bishop with a recommendation
- 9° Offers counsel and monitors all the parish's investments, savings, special funds, and wills and bequests
- 10° Offers counsel and assists the pastor in conducting the fund-raising activities needed in the parish so that its members can fully participate as stewards
- 11° Assists the pastor with helpful information pertaining to contracts, warranties, taxes, personnel policies or practices, bidding procedures, security, etc
- 12° Cooperates with the diocesan legal counsel in instances of civil litigation

§10. RELATIONSHIP OF PARISH FINANCE COUNCIL AND OTHER CHURCH ORGANIZATIONS: The Parish pastoral Council has the more general responsibility of collaborating with the pastor in terms of examining pastoral activities, discerning the needs of the apostolate, developing the written pastoral plan for apostolic action, and reviewing, evaluating and reporting the outcomes of the pastoral plan and activities.

§11. It is expected that the pastor and parish pastoral council will offer to the parish finance council the proposed written parish plan in a sufficient amount of time prior to the new fiscal year requesting that a parish budget be developed. The parish finance council collaborates with the various parish staff members, the parish pastoral council, the pastor and other appropriate parties for the development of the new parish budget. Parish priorities are set by the pastor and parish pastoral council.

§12. The parish finance council is available as an informational resource to the parish pastoral council throughout the year. Together with the pastor, it provides the parish pastoral council with regular and adequate financial reports.

§13. *MISSION CHURCHES:* If a parish has a mission church(es), the pastor and parish pastoral council will need to determine how the parish finance council is to be organized. Some options follow: (1) a member from each mission serves on the finance council, (2) the mission church has its own finance council (without trustees); (3) the parish finance council serves all the churches in the parish while remaining especially sensitive to the needs and opinions of the mission churches. Once the determination is made, the council is established and the relationships follow accordingly.

§14. *OTHER PARISH ORGANIZATIONS:* The parish finance council assists other parish organizations in the development of their annual budgets and reviews their regular financial reports. All organizations and activities in the parish enjoying the privilege of the tax free status offered the church are subject to having their financial activities reviewed by the parish finance council and reported thereby.

§15. *DIOCESAN FINANCE COUNCIL:* The parish finance council has the Diocesan Finance Council and Diocesan Finance Officer who provide information, review and oversight of parish finance councils as one of its greatest resources. The annual parish budget and the acts of extra-ordinary administration, e.g., expenditures requiring the permission of the Diocesan Bishop must be presented in accord with *Diocesan Policy*.

§16. In the administration of the diocesan insurance plans and retirement plans, the Diocesan Finance Officer will seek the counsel of the Diocesan Finance Council. A similar consultative process will be employed in the progressive development of written personnel and financial policies.

§17. *STANDARDS OF PERFORMANCE:* All administrators (c. 1284) are bound to fulfill their office with the diligence of a good householder, which essentially means that, with the aid of the parish finance councils, they must:

1° ensure that none of the goods entrusted to their care is in any way lost or damaged and take out insurance policies for this purpose, insofar as such is necessary or possible;

2° ensure that the ownership of ecclesiastical goods is safeguarded through civilly valid and legal methods;

3° observe the prescriptions of both canon law and civil law or those imposed by the founder, donor or legitimate authority; they must especially be vigilant lest the Church be harmed through the non-observance of civil laws;

4° accurately collect the revenues and income when they are legally due, safeguard them once collected and apply them according to the intention of the donor or according to established legal norms;

5° pay the interest on any loan or mortgage when it is due and take care that the capital debt itself is repaid on schedule;

6° with the consent of the Diocesan Bishop, invest excess funds after expenses that can be profitably used for the goals of the institution;

7° keep accurate receipts and expenditures;

8° provide a report on their administration at the end of each year;

9° arrange and safeguard the documents and deeds of the church or the institution; forward authentic copies of them in the archives of the Diocese;

10° assist and collaborate with the parish finance council in the development of the annual parish budget.

11° neither initiate nor contest a lawsuit on behalf of a the institution in civil court unless they obtain the written permission of the Diocesan Bishop (c. 1288);

12° even though not bound to administration by ecclesiastical office, administrators cannot relinquish their responsibilities on their own initiative; if, however, the Church is harmed by an arbitrary abandonment of duty, the administrator is bound to restitution (c. 1289);

13° render an account to the faithful concerning the contributions of the faithful to the Church (c. 1287, §2);

§18. In practice, these functions mean that the following:

1° Administrators of parish programs, organizations, schools, projects, etc. are accountable to their respective boards or councils and to the pastor of the parish, or the one equivalent in law.

2° The pastor, or the one equivalent in law, is accountable along with the parish finance council to the Diocesan Bishop.

3° The Diocesan Bishop, together with the Diocesan Finance Council, Presbyteral Council and College of Consultors is accountable to the Holy See.

Effective July 1, 2011 the following were removed:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY

§1. Monthly Compensation for Clergy Assigned in the Diocese of Alexandria

FY 2010-2011		
<i>Pastors & Parochial Vicars</i>	<i>Earned Income</i>	\$1,510.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,995.00
<i>Transitional Deacons</i>	<i>Earned Income</i>	\$655.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,140.00

....

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS “Standard Mileage Rate” (50¢ per mile in 2010). To obtain reimbursement for this mileage a written record must be submitted monthly (COA #7021). This amount is also reported by secular priests as a reimbursement on IRS Form 2106; it is NOT reported on his W-2, however.

....

9° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for FY 2010-2011 this amount is \$14,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of

homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses....

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS

§1. Monthly Compensation for Retired Priests

FY 2010-2011	
Retirement Benefit	\$ 455.00
Housing Allowance	1,375.00
TOTAL MONTHLY COMPENSATION CHECK	\$1,830.00

....

3° The total amount will be increased yearly until parity is achieved with those in active ministry.

§2. Other Payments to or for a Retired and Unassigned Priest

....

3° The Part B or Part D Medicare amount that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

....

5° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for FY 2010-2011 this amount is \$14,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses.

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS...

§4. ALIENATION: For validity, the Pastor must have the written recommendations of the parish pastoral council and the parish finance council and the written consent of the Diocesan Bishop for all acts of "alienation" of real property or the goods of the Parish, School or other entity when the maximum limit of his authority will be exceeded. Alienation includes sales, loans, leases or expenditures for property, construction and improvement projects (including those funded by others). The maximum limit of a pastor's authority is \$28,495 or 5% of a parish's previous fiscal year's taxable income, whichever is higher (effective June 2008; adjusted yearly by the CPI per USCCB agreement with the Holy See and in accord with canon 1292, §1).

...

§7. PARISH ASSESSMENT POLICY: Parish/Mission assessments are based on the prior twelve (12) month's assessable income as reported on the parish/mission quarterly financial reports for the quarters ending June 30th, September 30th, December 31st and March 31st of the previous year.

...

3° The following tax schedule provides for calculation of the assessments on an annual basis.

Annual Assessable Income	Assessment Rate
Less than \$15,000	5%
\$15,000 - \$19,999	5 %
\$20,000 - \$29,999	5.5%
\$30,000 - \$39,999	6.5%
\$40,000 - \$49,999	7.5%
\$50,000 - \$59,999	12%
\$60,000 - \$69,999	13%
\$70,000 - \$79,999	14%
\$80,000 - \$89,999	15%
\$90,000+	16%

The following were removed as of July 1, 2010:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY

§ 1. Monthly Compensation for All Clergy Assigned in the Diocese of Alexandria

FY 2008-2009		
<i>Pastors & Parochial Vicars</i>	<i>Earned Income</i>	\$1,470.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,955.00
<i>Transitional Deacons</i>	<i>Earned Income</i>	\$640.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,125.00

1° Only this earned income is recorded in the parish books under chart of account # 6010 (COA #6010). Only this annualized amount is to be reported on the W-2 form prepared and distributed by the parish in January each year as provided by the IRS.

2° State and federal income tax as well as self-employment tax is paid from this or other earned income. The amount of self-employment tax paid should be calculated with the assistance of a tax advisor based on the fair market value of room and board. A clergyman, at the time of disability or retirement shall qualify for and receive a social security income proportionate to the taxes he has paid.

3° Contributions to a Roth IRA, IRA or other retirement investments granted tax advantages by the government should be made from this or other income.

4° Reimbursement for ministerial (“professional”) expenses other than mileage is paid monthly (COA #6015). This amount is reported by the priest as a reimbursement on IRS Form 2106; it is not reported on his W-2. If the clergyman received reimbursement in excess of actual ministerial expenses, this excess must be added to the “Wage, salary, tips, etc.” income on Form 1040 and included as income in the calculation of the clergyman’s self-employment tax.

5° Monthly payments are due and payable on or after the twentieth day of the month in which services are rendered. This compensation check shall not include other payments.

....

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS “Standard Mileage Rate” (55¢ per mile in 2009). To obtain reimbursement for this mileage a written record must be submitted monthly (COA #7021). This reim-

bursed amount must be reported by the priest as a reimbursement to the IRS; it is NOT reported on his W-2, however.

....
 5° The Part B Medicare amount that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

....
 7° Priestly Sabbaticals are paid in accord with that *Diocesan Policy* (Art. 1140).

....
 9° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for FY 2008-2009 this amount is \$14,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses....

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS

§1. Monthly Compensation for Retired Priests

FY 2008-2009	
Retirement Benefit	\$ 425.00
Housing Allowance	1,200.00
TOTAL MONTHLY COMPENSATION CHECK	\$1,625.00

....

3° The total amount will be increased yearly by a new formula beginning in FY 2009-2010 that will more quickly achieve parity with those in active ministry.

§2. Other Payments to or for a Retired and Unassigned Priest

....
 3° The Part B Medicare amount that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

....
 5° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for FY 2008-2009 this amount is \$14,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses.

....

Art. 1108 – PARISH OBLIGATIONS FOR THE BENEFIT OF PRIESTS

§ 1. Monthly Payments as Invoiced by the Diocesan Business Office:

FY 2008-2009	
Infirmed Priests Fund	\$ 150.00
Retired Priests Fund	250.00
Burial Fund for Priests	\$25.00
TOTAL CHECK	\$ 425.00

1° These amounts are owed for *each priest* assigned to a parish.

....

The following were removed as of January 1, 2009:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY...

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS “Standard Mileage Rate” (58.5¢ per mile in 2008).

The following were removed as of July 1, 2008:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY

§1. Monthly Compensation for All Clergy Assigned in the Diocese of Alexandria

<i>FY 2007-2008</i>		
<i>Pastor</i>	<i>Earned Income</i>	\$1,395.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,880.00
<i>Parochial Vicar</i>	<i>Earned Income</i>	\$1,135.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,620.00
<i>Transitional Deacon</i>	<i>Earned Income</i>	\$595.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,080.00

...

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS “Standard Mileage Rate” (50.5¢ per mile in 2008). To obtain reimbursement for this mileage a written record must be submitted monthly (COA #7021). This amount is reported by the priest as a reimbursement on IRS Form 2106; it is not reported on his W-2....

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS

§1. Monthly Compensation for Retired Priests

FY 2007-2008	
Retirement Benefit	\$ 425.00
Housing Allowance	1,125.00
TOTAL MONTHLY COMPENSATION CHECK	\$1,550.00

...

3° The total amount will be increased yearly by \$75.00 per month until the total will equal the total monthly compensation of a pastor.

Art. 1110 – COMPENSATION AND BENEFITS FOR SEMINARIANS

§1. Pastoral Interns

1° Lay seminarians assigned to a parish for an internship receive a stipend of 85% of the total amount paid to transitional deacons (see *Diocesan Policy* Art. 1100, § 1). Monthly payments are due and payable on or after the twentieth day of the month in which services are rendered (COA #6030). This compensation check shall not include other payments.

2° They are also entitled to the same *Mileage Reimbursement* (COA #7021) and *Room and Board* (COA #7460) as transitional deacons. With respect to State and Federal taxes, they are treated as any lay employee (COA #6130).

§2. Other Seminarians

1° Seminarians assigned to a parish for pastoral experience receive a stipend of 70% of the total amount paid to transitional deacons (see *Diocesan Policy* Art. 1100, § 1). Monthly payments are due and payable on or after the twentieth day of the month in which services are rendered (COA #6030). This compensation check shall not include other payments.

2° They are also entitled to the same *Mileage Reimbursement* (COA #7021) and *Room and Board* (COA #7460) as transitional deacons. With respect to State and Federal taxes, they are treated as any lay employee (COA #6130).

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS

...

§4. ALIENATION: For validity, the Pastor must have the written recommendations of the parish pastoral council and the parish finance council and the written consent of the Diocesan Bishop for all acts of “alienation” of real property or the goods of the Parish, School or other entity when the maximum limit of his authority will be exceeded. Alienation includes sales, loans, leases or expenditures for property, construction and improvement projects (including those funded by others). The maximum limit of a pastor’s authority is \$27,373 or 5% of a parish’s previous fiscal year’s taxable income, whichever is higher (ef-

fective June 2007; adjusted yearly by the CPI per USCCB agreement with the Holy See and in accord with canon 1292, §1).

Art. 2080 – SALE AND USE OF ALCOHOLIC BEVERAGES

§1. Recognizing the problems caused by alcohol abuse in many families and deserves to promote a family atmosphere at parish/school fund-raising events, the following *Diocesan Policy* is to be strictly followed:

§2. THE SELLING OF ALCOHOLIC BEVERAGES (BEER, WINE AND WHISKEY) IS PROHIBITED AT ALL PARISH OR SCHOOL FUND-RAISING EVENTS.

§3. Respecting individual freedoms, this *Diocesan Policy* is not a judgment on the use of alcohol. However, because of the potential of alcohol abuse, this is a prohibition against the sale of alcohol as a source of revenue.

§4. The following processes are to be observed:

1° No parish, or school, or parish-or-school-related organization is permitted to sell alcoholic beverages or “set-ups” at fund-raising events.

2° Signs are to be posted at fund-raising events indicating that the use of alcoholic beverages is prohibited.

3° Law enforcement officials are to be employed if there is the probability that alcoholic beverages will be brought onto the grounds of fund-raising events.

4° The selling of admission tickets that allow for “free drinks” or the equivalent is prohibited.

5° Caution should be observed concerning fund-raising events on Church property when there is strong probability that alcoholic beverages may be brought onto the property.

§5. Use of Alcohol at Parish Socials: The use of alcohol at parish socials in moderation is permitted. In order to maintain a proper atmosphere, the following guidelines are offered:

1° If alcohol is to be served, it must be dispensed by responsible people over 21 years of age. “Open Bars” and free access to kegs of beer is prohibited.

2° The individual who is dispensing shall serve only one drink at a time and may not consume alcohol while serving in the parish.

3° Food shall be served as part of the event.

4° Every precaution shall be taken to ensure that no alcoholic beverages are brought into the event and that the only alcoholic beverages consumed are those being dispensed at the event.

5° No alcohol shall be served to anyone under the age of 21. Proof of age should be verified if a doubt exists.

6° A pre-existing plan shall be devised for individuals who exhibit symptoms of excessive consumption. This would include a method of limiting additional consumption and to providing transportation home.

§6. Use of Alcohol at Church Facilities Rented for Private/Public Use: Whether the facility is rented or used by parishioners, significant liability exposure becomes a reality. In order to minimize the risk that is introduced by the use of alcohol, the guidelines listed in the previous section (Use of Alcohol at Parish Socials) shall be included in RENTAL AGREEMENTS between a parish or school and those who rent or use the facility. These signed agreements shall be received prior to the event.

The following were removed as of January 1, 2008:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY....

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS “Standard Mileage Rate” (48.5¢ per mile in 2007). To obtain reimbursement for this mileage a written record must be submitted monthly (COA #7021). This amount is reported by the priest as a reimbursement on IRS Form 2106; it is not reported on his W-2.

2° Stipends and stole fees are also earned-income. These amounts are not reported on a priest’s W-2. They are governed in *Diocesan Policy* Art. 1050.

3° Any priest is expected to be out-of-pocket a maximum of \$500.00 per year for covered, in-network prescription and medical expenses (The goal is to reduce this amount to \$250.00 in stages). The Diocesan Infirm Priests Fund will reimburse any priest the difference between the amount paid by insurance and the documented cost paid by the priest for qualified prescription and medical expenses. Application for reimbursement must be made to the Diocesan Insurance Clerk. This reimbursement is not to be reported to the IRS as income to the priest. Prescription and medical expenses that do not qualify as both covered and in-network are not reimbursed by the Diocesan Infirm Priests Fund. The latter are paid by the health insurance carrier according to their reduced coverage schedules and the priest himself is responsible to his medical providers for the remainder owed. There is no reimbursement for medically unnecessary and elective services and procedures; they are to be borne by the priest himself....

§7. VACATIONS

1° The annual vacation for a priest is three Sundays and four weeks. Exceptions require written permission from the Diocesan Bishop.

2° The proper dean shall be informed when a pastor without a parochial vicar or resident priest will be absent from his parish for more than two (2) days. The dean is to be told where the pastor may be reached in an emergency. The pastor himself is responsible to secure another priest to cover for emergencies and funerals and to make the arrangements known to the dean. A secretary or someone known to other parishioners as a contact should also know how to call the priest covering for emergencies and funerals.

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS...

§2. Other Payments to or for a Retired and Unassigned Priest

1° Any priest is expected to be out-of-pocket a maximum of \$500.00 per year for covered prescription and medical expenses (The goal is to reduce this amount to \$250.00 in stages). The Diocesan Infirm Priests Fund will reimburse any priest the difference between the amount paid by insurance and the documented cost paid by the priest for qualified prescription and medical expenses. Application for reimbursement must be made to the Diocesan Insurance Clerk. This reimbursement is not to be reported to the IRS as income to the priest. Prescription and medical expenses that do not qualify as both covered and in-network are not reimbursed by the Diocesan Infirm Priests Fund. The latter are paid by the health insurance carrier according to their reduced coverage schedules and the priest himself is responsible to his medical providers for the remainder owed. There is no reimbursement for medically unnecessary and elective services and procedures; they are to be borne by the priest himself.

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS...

§4. ALIENATION: For validity, the Pastor must have the written consent of the Diocesan Bishop for all acts of “alienation” of real property or the goods of the Parish, School or other entity when the maximum limit of his authority will be exceeded. Alienation includes sales, loans or expenditures for property, construction and improvement projects (including those funded by others). The maximum limit of a pastor’s authority is \$27,373 or 5% of a parish’s previous fiscal year’s taxable income, whichever is higher (effective January 2007; adjusted yearly by the CPI per USCCB agreement with the Holy See and in accord with canon 1292, §1).

1° Furthermore, this amount refers to the total cost of a single project: it is not permitted to circumvent this requirement by considering a larger expenditure as a series of smaller ones. Likewise, a given project may not be divided into phases or several fiscal years for the same purpose.

2° This requirement applies to all expenses paid from parish, mission, school, cemetery, or other institutional funds or from some other contribution or source.

3° A request for the consent of the Diocesan Bishop shall be submitted by the first day of the month in which a response is expected. Some requests may take longer than a month for approval.

4° The pastor shall seek advice and recommendations from the parish pastoral council and the parish finance council.

5° Detailed procedures are described in Construction and Renovation of Buildings above the maximum limit of a pastor’s authority defined in *Diocesan Policy Art. 2020, §4*. See *Diocesan Policy Art. 2140* for procedural details.

6° Additional procedures are required for places of worship above the maximum limit of a pastor’s authority defined in *Diocesan Policy Art. 2020, §4*. See *Diocesan Policy Artt. 2140 - 2141* for procedural details.

7° For insurance coverage to be in force, the Diocesan Business Office must be informed of all new construction or demolition before the project begins.

8° Pastors are held personally liable for invalid acts of administration.

THE COLLEGE OF CONSULTORS

STATUTES....

ARTICLE V: Functions....

§1. The Diocesan Bishop needs the consent of the College of Consultors and that of the Diocesan Finance Council....

5° To lease church property when the annual lease income exceeds the minimum limit (c. 1297).

6° To lease church property when the value of the leased property exceeds the minimum and the lease is for more than nine (9) years (c. 1297).

Appendix D – DIOCESAN FINANCE COUNCIL

CONSTITUTION....

ARTICLE II: PURPOSE AND SCOPE....

§3. The diocesan bishop needs the consent of this Council and that of the College of Consultors in order to perform acts of extraordinary administration....

5° To lease church property when the annual lease income exceeds the minimum limit (c. 1297).

6° To lease church property when the value of the leased property exceeds the minimum and the lease is for more than nine (9) years (c. 1297).

The following were removed as of July 1, 2007:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY

§1. Monthly Compensation for All Clergy Assigned in the Diocese of Alexandria

<i>FY 2006-2007</i>		
<i>Pastor</i>	<i>Earned Income</i>	\$1,320.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,805.00
<i>Parochial Vicar</i>	<i>Earned Income</i>	\$1,070.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,555.00
<i>Transitional Deacon</i>	<i>Earned Income</i>	\$555.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,040.00

... §5 Other Payments to or for Any Assigned Priest ... 9° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for 2006 this amount is \$13,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses. Priests who have already paid for a pre-need plan will be reimbursed for that plan by application to the Business Affairs Office during FY 2006 – 2007.

... §8. SUPPLY COVERAGE ... 4° The honorarium to be offered is \$35.00 per Mass.

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS

§1. Monthly Compensation for Retired Priests

FY 2006-2007	
Retirement Benefit	\$ 350.00
Housing Allowance	1,125.00
TOTAL MONTHLY COMPENSATION CHECK	\$1,475.00

... §2. Other Payments to or for a Retired and Unassigned Priest ... 5° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for 2006 this amount is \$13,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses. Priests who have already paid for a pre-need plan will be reimbursed for that plan by application to the Business Affairs Office during FY 2006 – 2007.

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS.... §7. PARISH ASSESSMENT POLICY.... 3° The following assessment tax schedule provides for calculation of the assessments on an annual basis. Assessment rate brackets reflect actual tax rates paid, with increments of 1% as shown below:

Annual Assessable Income	Assessment Rate
Less than \$15,000	5%
15,000 - 19,999	5% on 1 st \$14,999
20,000 - 24,999	11% on Income \$15,000 - 19,999 5% on 1 st \$14,999
25,000 - 29,999	11% on Income \$15,000 - 19,999 12% on Income \$20,000 - 24,999 5% on 1 st \$14,999
30,000 - 39,999	11% on Income \$15,000 - 19,999 12% on \$20,000 - 29,999 7% on 1 st \$14,999
40,000 - 49,999	11% on Income 15,000-29,999 13% on Income 30,000-39,999 7% on 1 st \$14,999
50,000 - 59,999	11% on Income 15,000-29,999 13% on Income 30,000-39,999 14% on Income 40,000-49,999 15%

60,000 - 69,999	16%
70,000 - 79,999	17%
80,000 - 89,999	18%
90,000+	19%

Bishop Herzog has made a significant change in the way special collections especially from appeals made by visiting clergy on behalf of Catholic entities are to be transmitted. As of February 24, 2007, they are to be sent directly to the Diocesan Business Office.

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS ...

§10. SPECIAL COLLECTIONS as prescribed annually are to be taken up in all churches for diocesan, national or universal projects. Pastors are authorized to take up special collections for building, school and charitable works of their own parish or other Catholic institutions. It is forbidden to take up collections in church for any other worthy cause, even non-profits or needy individuals or families without the express, written consent of the Diocesan Bishop. In the case of diocesan collections not to be retained by the parish and all national and universal collections, all proceeds are to be sent to the Diocesan Business Office as they are received. Otherwise, 100% of the funds are disbursed to the entity for which they were collected as they are received. (See Canon 1266.)

Article 1242 – PRINTED POLITICAL MATERIALS AND ELECTIONEERING was added to the *Diocesan Policy* by Bishop Herzog in conformity with policies throughout the Province of New Orleans. **Article 1240 – POLITICS AND PUBLIC POLICY** was amended accordingly on February 24, 2007.

Art. 1240 – POLITICS AND PUBLIC POLICY

§1. The Catholic Church and its Community Role: The Catholic Church in Louisiana has historically had a high profile, a role of leadership, and a commitment to serve both the temporal and spiritual needs of the State's citizens.

§2. Its help is sought by and readily given to city, state, and federal authorities not only during times of crisis or great need but over the long-range, day-to-day, collaborate with government agencies.

§3. The Church is a major contributor to the society in which we live. Its widespread social services and educational programs are clear illustrations. Its buildings are part of the State's heritage tourist lure. Its employment of thousands of men and women contributes heavily to the economy, and its presence—enhances and defends ethical standards and values.

§4. The Church also seeks, as we all should, to correct the imperfections around us and is obligated to speak on significant public issues.

§5. The Church is not something apart from society, but an integral part of it with a right and obligation to be a moral voice within that community.

§6. Limitations on the Church: The voice of the Church, however, is not always valued by public officials.

§7. Cardinal John O'Connor of New York summarized the position of the Church when he wrote: “Issue-oriented speech is entirely proper under the [Internal Revenue Service] Code’s framework and is further protected by the First Amendment of the Constitution. The difference really boils down to people vs. issues. In the political arena, Church groups may not support or oppose people; they are encouraged, however, to support or oppose issues.”

§8. Thus, the Church’s guidelines limit its role in addressing issues. The Church may not become involved in partisan politics nor endorsing or opposing individual candidates for public office. Also see Art. 1242 on the Distribution of Printed Political Materials and Electioneering.

§9. The Church and Politics: On September 1, 1987, the Catholic bishops of the United States stated, “We bishops specifically do not seek the formation of a religious voting bloc; nor do we wish to instruct persons on how they should vote by endorsing or opposing candidates. We do, however, have a right and a responsibility as teachers to analyze the moral dimensions of the major issues of the day.” Regrettably, the Catholic Church is frequently attacked for taking public positions on moral issues.

§10. Endorsement of or opposition to specific political parties or candidates for public office must be avoided.

§11. Parish, schools and other Church facilities, as well as those belonging to other Catholic groups, are not to be used for any activity related to the support or opposition to any candidate for political office, nor as places for partisan debate. The pulpit, especially, is never to be used by office holders or office seekers to advance their views or their political positions, nor as a forum for any individual, even a priest or deacon, to support or oppose a candidate or public official.

§12. Parish bulletins, websites, newspapers or other means of communication are never to be used to support or oppose a candidate for public office or to endorse or oppose a specific political party. Neither may official parish or school stationary or other displays be used in this way.

§13. *The Church Today*, our diocesan newspaper, and all other Catholic bulletins and publications, as well as any other advertising media on property controlled or owned by the Church, are not to accept political advertising in support or opposition to any candidate for public office or of any political party.

§14. The distribution of marked sample ballots or the posting of political signs or billboards are not permitted on Church property.

§15. No funds or “in kind” donations from any parish, school, or Catholic group are to be contributed to any political action committee, political candidate, political campaign or party.

§16. Although the above types of activities are to be avoided, there are acceptable kinds of activities. Parishes and other Catholic groups may and sometimes should engage in issue-oriented public activities. Examples of acceptable activities include:

1° Educational efforts about issues in support of or opposition to legislation, mindful to stress the whole of Catholic teaching

2° Occasional letter-writing campaigns and other contacts with legislators designed to educate them and to develop their support for or opposition to legislation

3° Distribution of printed materials containing a statement about an issue or issues before the Congress or State legislature, and containing the names and addresses of all senators and representatives of the pertinent locale

4° Religious and moral instruction—published and/or preached—concerning particular issues, especially those affecting human life in *all* of its stages, is always appropriate

5° Non-partisan voter registration campaigns and “get-out-the-vote” efforts are proper and even recommended activities for parishes and other Catholic groups

§17. Private vs. Public Opinions: Clergy, religious, and others clearly identified with the Church do have the right to speak and express personal political opinions. However, it is difficult to separate individual private opinions of Church representatives from “official” statements. Therefore, the time and place for private political expression must be clearly distinct from “official” Church assemblies and properties.

The following change in *Diocesan Policy* happens annually as the amount a pastor may expended without consent is adjusted according to the CPI. As of December 22, 2015, the amount was increased to \$27,373.

Art. 2020 – FISCAL MANAGEMENT OF PARISHES/MISSIONS

...

§4. ALIENATION: For validity, the Pastor must have the written consent of the Diocesan Bishop for all acts of “alienation” of real property or the goods of the Parish, School or other entity when the maximum limit of his authority will be exceeded. Alienation includes sales, loans or expenditures for property, construction and improvement projects (including those funded by others). The maximum limit of a pastor’s authority is \$26,705 or 5% of a parish’s previous fiscal year’s taxable income, whichever is higher (effective April 15, 2006; adjusted yearly by the CPI per USCCB agreement with the Holy See and in accord with canon 1292, §1)....

As of January 1, 2007, Diocesan Policy Articles 1100 and 1105 changed. The IRS "Standard Mileage Rate" is 48.5¢ per mile for 2007. This change affects all references in any policy to this rate. For priests the out-of-pocket maximum is now \$500.00 per year for covered, in-network prescription and medical expenses. Therefore, the following Articles were made obsolete:

Art. 1100 – COMPENSATION AND BENEFITS OF CLERGY

§ 1. Monthly Compensation for All Clergy Assigned in the Diocese of Alexandria

<i>FY 2006-2007</i>		
<i>Pastor</i>	<i>Earned Income</i>	\$1,320.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,805.00
<i>Parochial Vicar</i>	<i>Earned Income</i>	\$1,070.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,555.00
<i>Transitional Deacon</i>	<i>Earned Income</i>	\$555.00
	<i>Professional Expense Allowance</i>	485.00
	<i>TOTAL COMPENSATION CHECK</i>	\$1,040.00

1° Only this earned income is recorded in the parish books under chart of account # 6010 (COA #6010). Only this annualized amount is to be reported on the W-2 form prepared and distributed by the parish in January each year as provided by the IRS.

2° State and federal income tax as well as self-employment tax is paid from this or other earned income. The amount of self-employment tax paid should be calculated with the assistance of a tax advisor based on the fair market value of room and board. A clergyman, at the time of disability or retirement shall qualify for and receive a social security income proportionate to the taxes he has paid.

3° Contributions to a Roth IRA, IRA or other retirement investments granted tax advantages by the government should be made from this or other income.

4° Reimbursement for ministerial ("professional") expenses other than mileage is paid monthly (COA #6015). This amount is reported by the priest as a reimbursement on IRS Form 2106; it is not reported on his W-2. If the clergyman received reimbursement in excess of actual ministerial expenses, this excess must be added to the "Wage, salary, tips, etc." in-

come on Form 1040 and included as income in the calculation of the clergyman's self-employment tax.

§2. Incardinated Priests of the Diocese Who Are Assigned in the Diocese: Each such priest is compensated personally and his parish makes payments to the diocesan funds as required in *Diocesan Policy Art. 1108*. No such payments are required for transitional deacons.

§3. Secular Priests Not Incardinated, but Assigned by the Diocesan Bishop of Alexandria: Each such priest is compensated personally and his parish makes payments to the diocesan funds as required in *Diocesan Policy Art. 1108*. A written agreement between the priest and the Diocesan Bishop may provide otherwise.

§4. Priests of Religious Institutes or Societies of Apostolic Life Assigned by the Diocesan Bishop of Alexandria: Each religious order or society of apostolic life is compensated monthly by check made payable to the entity and not to an individual in accord with the written agreement between its major superior and the Diocesan Bishop of Alexandria. The priest's parish makes payments to the diocesan funds as required in *Diocesan Policy Art. 1108* unless a written agreement between its major superior and the Diocesan Bishop of Alexandria provides otherwise.

§5. Other Payments to or for Any Assigned Priest

1° For parish and diocesan ministry a priest or transitional deacon is reimbursed monthly at the IRS "Standard Mileage Rate" (44.5¢ per mile in 2007). To obtain reimbursement for this mileage a written record must be submitted monthly (COA #7021). This amount is reported by the priest as a reimbursement on IRS Form 2106; it is not reported on his W-2.

2° Stipends and stole fees are also earned-income. These amounts are not reported on a priest's W-2. They are governed in *Diocesan Policy Art. 1050*.

3° Any priest is expected to be out-of-pocket a maximum of \$750.00 per year *for covered, in-network* prescription and medical expenses (The goal is to reduce this amount to \$250.00 in stages). The Diocesan Infirm Priests Fund will reimburse any priest the difference between the amount paid by insurance and the documented cost paid by the priest for qualified prescription and medical expenses. Application for reimbursement must be made to the Diocesan Insurance Clerk. This reimbursement is not to be reported to the IRS as income to the priest. Prescription and medical expenses that do not qualify as both covered and in-network are not reimbursed by the Diocesan Infirm Priests Fund. The latter are paid by the health insurance carrier according to their reduced coverage schedules and the priest himself is responsible to his medical providers for the remainder owed. There is no reimbursement for medically unnecessary and elective services and procedures; they are to be borne by the priest himself.

4°. Prescriptions at age 65 are no longer available through the provider under the health insurance coverage. Priests shall then be reimbursed for sixty percent (60%) of prescription expenses from the beginning of the calendar year until the out-of-pocket limit (see above) is reached. When the out-of-pocket limit is reached, prescription expenses are reim-

bursed at 100% for the remained of the calendar year. Documented claims for reimbursement, therefore, must be submitted to the Insurance Clerk in the Diocesan Business Office.

5° The Part B Medicare amount that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

6° "Rectory Living Expenses" are paid by the parish (COA #7460). If a priest or transitional deacon has paid for these expenses from his own pocket, he is reimbursed only for the documented amounts. ***He must not be provided a fixed, monthly amount for these expenses.*** Housekeepers or cooks may be hired as parish employees if the parish can afford them. A priest receives no additional compensation if he undertakes these or any other duties such as lawn care or janitorial duties himself.

7° Priestly Sabbaticals are paid in accord with that *Diocesan Policy* (Art. 1140).

8° The costs of an annual retreat and for continuing education are paid by the parish only for documented amounts and shall not exceed \$1,000 (COA #7080). Exceptions require the approval of the Diocesan Bishop.

9° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for 2006 this amount is \$13,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses. Priests who have already paid for a pre-need plan will be reimbursed for that plan by application to the Business Affairs Office during FY 2006 – 2007.

§6. Protection of Compensation

1° Without exception, every priest is to take from the parish the full compensation as provided above. Compensation is treated as an acquired right.

2° Priests, who are unable to compensate themselves fully, must report immediately in writing this fact to the Diocesan Bishop.

§7. VACATIONS

1° The annual vacation for a priest is three Sundays and four weeks. Exceptions require written permission from the Diocesan Bishop.

2° The proper dean shall be informed when a pastor without a parochial vicar or resident priest will be absent from his parish for more than two (2) days. The dean is to be told where the pastor may be reached in an emergency. The pastor himself is responsible to secure another priest to cover for emergencies and funerals and to make the arrangements known to the dean. A secretary or someone known to other parishioners as a contact should also know how to call the priest covering for emergencies and funerals.

§8. SUPPLY COVERAGE

1° Priests who "supply coverage" for Mass are those who are not assigned canonically or "in residence" in, or otherwise assigned to the parish (school, diocesan ministry or institution) in question. There is no compensation paid by the parish for celebrating other sacraments.

2° A parish pays for coverage when those who usually celebrate any Mass (weekday or day of precept) are absent for the permitted time of vacation, illness or church related business (including retreat and continuing formation). There is no requirement for provision of daily Mass. The priest himself pays coverage when personal reasons require his absence beyond those times noted above. For example, a priest pays the one who supplies for him when he has a wedding in another place (and he is not on vacation legitimately; a parochial vicar requires the approval of the pastor).

3° At the discretion of the pastor, there is no obligation to provide coverage for a weekday Mass. In any case, however, the responsibility for obtaining coverage is that of the priest who will be absent (in the case of a parochial vicar, with the approval of the pastor) unless it is a case of sudden illness.

4° The honorarium to be offered is \$35.00 per Mass. Additionally, Mass stipends are paid in accord with *Diocesan Policy* Art. 1050 and is earned income. Earned income must be added to the “Wage, salary, tips, etc.” income on Form 1040 and included as income in the calculation of the priest’s self-employment tax. If a priest receives honoraria totaling \$600.00 or more in a calendar year from a parish, IRS Form 1099 is issued. Travel is also paid at the current rate (see above). Additionally, food and lodging for the period of coverage may be offered by the parish.

5° No additional gifts are to be made for supplying coverage.

6° Certain amounts herein may be increased yearly based on the CPI as approved by the Diocesan Bishop.

Art. 1105 – RETIREMENT COMPENSATION OF PRIESTS

§1. Monthly Compensation for Retired Priests

FY 2006-2007	
Retirement Benefit	\$ 350.00
Housing Allowance	1,125.00
TOTAL MONTHLY COMPENSATION CHECK	\$1,475.00

1° At 70 years of age, a priest may submit his resignation and request for retirement to the Diocesan Bishop. Retirement is not effective until accepted by the Diocesan Bishop.

2° A portion of the monthly total is designated as a housing allowance. This allowance is not taxable for Federal Income Tax or Social Security purposes to the extent that it is actually spent in the course of the calendar year for direct housing expenses (e.g., rent, mortgage note, repairs, renovations, property taxes, utilities or insurance).

3° The total amount will be increased yearly by \$75.00 per month until the total will equal the total monthly compensation of a pastor.

§2. Other Payments to or for a Retired and Unassigned Priest

1° Any priest is expected to be out-of-pocket a maximum of \$750.00 per year for covered prescription and medical expenses (The goal is to reduce this amount to \$250.00 in stages). The Diocesan Infirm Priests Fund will reimburse any priest the difference between the amount paid by insurance and the documented cost paid by the priest for qualified prescription and medical expenses. Application for reimbursement must be made to the Diocesan Insurance Clerk. This reimbursement is not to be reported to the IRS as income to the priest. Prescription and medical expenses that do not qualify as both covered and in-network are not reimbursed by the Diocesan Infirm Priests Fund. The latter are paid by the health insurance carrier according to their reduced coverage schedules and the priest himself is responsible to his medical providers for the remainder owed. There is no reimbursement for medically unnecessary and elective services and procedures; they are to be borne by the priest himself.

2° Retired priests shall also be reimbursed for sixty percent (60%) of prescription expenses from the beginning of the calendar year until the out-of-pocket limit (see above) is reached. When the out-of-pocket limit is reached, prescription expenses are reimbursed at 100% for the remainder of the calendar year. Documented claims for reimbursement must be submitted to the Insurance Clerk in the Diocesan Business Office.

3° The Part B Medicare amount that may be deducted from a priest's Social Security benefit is reimbursed by the parish (COA #6310) to the priest each month. This reimbursement is not to be reported to the IRS as income to the priest.

4° The costs of an annual retreat and continuing education are paid by the Diocese only for documented amounts and shall not exceed \$1,000.

5° At the death of a priest, the Diocese provides his funeral expenses. The funeral expenses are limited to the costs of services included in a package arranged through Kramer Funeral Home (for 2006 this amount is \$13,000). Details about the package may be obtained from the Diocesan Business Office. The estate of a priest utilizing the services of homes or places not included in this package will be reimbursed up to this amount for documented funeral expenses. Priests who have already paid for a pre-need plan will be reimbursed for that plan by application to the Business Affairs Office during FY 2006 – 2007.

§3 Presumptions Concerning a Priests' Personal Resources at Retirement: It is presumed that a priest has paid into Social Security so that he has some benefits and has personal savings so that he is not totally dependent upon retirement payments from the Diocese.

§4 Certain amounts herein may be increased yearly based on the CPI as approved by the Diocesan Bishop.