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## DECREE

### Articles of Diocesan Policy

The Most Reverend Robert W. Marshall, Jr., Bishop of Alexandria by the grace of God and favor of the Holy See, hereby re-establishes the attached document, entitled *Articles of Diocesan Policy*, as particular law for the Diocese of Alexandria. Any legislation needed to accomplish this goal is hereby enacted.

Supplementary but never contrary to the *Code of Canon Law* and other universal legislation governing the Catholic Church, these articles take precedence over those same laws whenever they treat matters on which those laws are silent. Nevertheless this particular law is to be interpreted in accord with the norms of Canons 7 through 22 of the Code.

Although written primarily for parishes and schools, these articles bind each and every individual and Catholic entity within the Diocese of Alexandria in accord with the norm of Canon 13. This includes all departments of the Diocese of Alexandria and its subordinate apostolates whether civilly incorporated or not; all parish and school organizations no matter how they are structured; and any other individuals or entities subject to the governance of the diocesan bishop including those designated Catholic by authorities other than the diocesan bishop or simply regarded as such because of their membership and activities.

Table of Contents

Decree of the Diocesan Bishop	1
Authentic Interpretations	3
Table of Contents	4
Introduction	7
Part I. The People of God	
Section I. The Christian Faithful in General	
Article 1100 • Parish Membership	8
Article 1200 • Parish Catechetical Instruction	10
Article 1300 • Schools Policies Handbook	12
Article 1400 • Political Activity	13
Article 1500 • Prison Ministry	17
Article 1600 • Assurance of Child Protection . . .	19
Section II. Laity in Particular	
Article 2100 • Employees of the Diocese and Parish	21
Section III. Clergy in the Diocese of Alexandria	
Article 3100 • The Ministry and Life of Priests	27
Article 3150 • Terms of Office for Priests	30
Article 3175 • Residence in the Rectory	31
Article 3200 • Supply Coverage	32
Article 3300 • Mass Stipends and Other Offerings	34
Article 3400 • Deacons	37
Article 3500 • Clerical Attire	41

Articles of Diocesan Policy

Article 3600 • Continuing Formation of the Clergy	42
Article 3700 • Clergy Salary	43
Article 3750 • Other Benefits for Clergy	47
Article 3775 • Sabbaticals	51
Article 3800 • Addiction in the Clergy	54
Article 3850 • Leave of Absence for Priests	57
Article 3900 • Funerals for Clerics in Questionable Standing	59

Section IV. Diocesan Structures

Article 4100 • Constitution of the Diocesan Finance Council	61
Article 4200 • Constitution of the Presbyteral Council	65
Article 4300 • Statutes of the College of Consultors	70
Article 4400 • Vicars Forane or Deans	76

Section V. Parish Structures

Article 5100 • Parish Pastoral Council	79
Article 5200 • Parish Finance Council	84

Part II. The Sanctifying Function of the Church

Section I. The Sacraments

Article 6100 • Christian Initiation	89
Article 6200 • Baptismal Registration and Certification	92
Article 6300 • Sacred Liturgy	97
Article 6400 • Extraordinary Ministers of Holy Communion	99
Article 6500 • Other Ministers in the Sanctuary	103
Article 6600 • Preparation for the Sacrament of Marriage	105

Articles of Diocesan Policy

Article 6700 • Notifications of Marriage and Death 106

Article 6800 • Ordinations to the Priesthood and Diaconate 107

Section II. Sacred Times and Places

Article 7100 • Remembrance of the Dead in Funeral Rites 108

Article 7200 • Cremation 109

Article 7300 • The Parish Church 110

Article 7400 • Additional Procedures for Places of Worship 111

Part III. Temporal Goods

Article 8100 • Fiscal Management of Parishes and Missions 112

Article 8200 • Financial Standards of Performance 119

Article 8300 • Fund-Raising & Other Contributions 121

Article 8400 • Sale and Use of Alcoholic Beverages 123

Article 8500 • Charitable Gaming 124

Article 8600 • Assets of Parish Organizations and Societies 125

Article 8700 • Consolidated Self-Insurance Program 126

Article 8800 • Construction and Renovation Processes 128

Forms Mentioned in the Articles

- A. Confirmation Liturgy Planning
- B. Episcopal Liturgy Planning
- C. Liability and Medical Release and Request to Participate
- D. Notification of Matrimony
- E. Notification of Death
- F. RCIA Candidate's Information

This space provided for notes.

## Introduction

Modeled on the *Codes of Canon Law* for both the Latin and Eastern Catholic Churches, this document contains three major sections:

- I. the People of God including norms for individual laity and clergy as well as both diocesan and parish structures;
- II. the Sanctifying Function of the Church including norms on the sacraments as well as sacred times and places;
- III. and the Administration of Temporal Goods.

All forms mentioned in the *Articles of Diocesan Policy* are available online or in other documents not attached to these articles. Nevertheless, all are mandatory and by reference are particular law equivalent to these *Articles of Diocesan Policy*.

Like the universal *Codes of Canon Law*, this text includes various kinds of statements. Some are binding and require specific action. Others exhort and call for prudential judgments on the part of the clergy or laity. Still others provide recommendations or outline best practices which are not always applicable to particular circumstances. As with the universal law, even statements not formally binding deserve respect and due consideration.

The responsibility for determining whether any statement is binding rests solely with the diocesan bishop, since he alone exercises legislative power in the local Church. However, sound pastoral practice strongly recommends—and canon law sometimes requires—consultation before certain administrative acts are enacted. Providing such consultation is ordinarily the task of the presbyteral council, the college of consultors, the diocesan finance council, and/or the diocesan building review committee. Hence, the foundational documents for these bodies appear below in Part I, Section IV.

All members of the Christian faithful—whether lay or clerical—“have the right and even at times the duty to manifest . . . their opinion on matters which pertain to the good of the Church” (c. 212, § 3). In the absence of a diocesan pastoral council, the proper procedure in the Diocese of Alexandria is to approach the bishop or one of his vicars with the concern and possible means to address it. The bishop may then present these to his consultative bodies or may handle the matter on his own.

# Part I. The People of God

## Section I. The Christian Faithful in General

### Article 1100 • Parish Membership

1. 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 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).
2. It is in the parish that the faithful are readied for their witness of life so that the divine message of salvation may increasingly reach the whole world (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 teaching; for the apostolate, justice, and charity; and for the decent sustenance of its ministers (c. 222).
3. As a general rule a parish is to be territorial, that is, it embraces all the Christian Faithful within a certain area; however, personal parishes may be established based on some other factor when a genuine spiritual need suggests it (c. 518).
4. 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, 1177, §2). Their rights are never lost by failure to register in, contribute to, or otherwise participate in a territorial parish.
5. Every Catholic has the 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). This is typically done at a proper territorial or personal parish. Many Catholics do,

however, choose to participate in activities, events and liturgies at other Catholic parishes. If a Catholic intends to become completely inactive at his or her proper territorial or personal parish, he or she ought to inform the pastor. Nevertheless, no Catholic ever loses the right to the ministries and services of the parishes in which they reside.

6. When families or individuals register in another parish outside their territory but within the diocese—whether it be personal or territorial—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 registration form may vary from parish to parish, but it shall contain the signature of one adult Catholic family member. The original physical records of these registrations are to be maintained in the parish files henceforth. A copy shall be sent to the Diocesan Development Office.
8. Once parish membership is acquired in accord with these *Articles of Diocesan Policy* or *de facto* by those "transferring" prior to October 30, 2006, the pastor of the chosen parish should presume he is the one to grant the permission required from the proper pastor for marriage (c. 1115) and to receive the information given to the proper pastor for funerals (c. 1177, §2).
9. No pastor or parish minister is to solicit membership from the parishioners of another territorial or personal parish.

Article 1200 • Parish Catechetical Instruction

1. Right knowledge of the Catholic faith is required for right living of the true faith. As such, catechesis is an essential part of the Church's ministry to children and to families. Instruction in the faith ideally begins at home during a child's formative years through the example of the parents. He or she grows in knowledge through formal instruction provided by the parish in the form of religious education classes or the parish school. This knowledge is reinforced through weekly participation at Sunday Mass and through parish activities or events.
2. The United States Conference of Catholic Bishops (USCCB) provides a regularly updated list of catechetical programs approved in light of *The Catechism of the Catholic Church*. This list, sample texts, and many other resources are readily available through the Diocesan Office of Religious Education. Only approved catechetical texts may be lawfully used in parish catechetical programs for school-age children or Catholic schools. The list of approved texts is found at: <https://www.usccb.org/resources/Current%20Conformity%20List.pdf>, which is a link to the *Conformity Review List* published by the USCCB Subcommittee on the Catechism. There are no other approved texts. No supplementary materials—even those from sources worthy of praise—may be used.
3. Home Schooling
  - 3.1. In accord with the Second Vatican Council's *Declaration on Christian Education*, which recognized parents as the "primary and principal" educators of their children (*Gravissimum educationis*, n. 3), it is important for parishes to support those parents who choose to home-school their children.
  - 3.2 At the same time, the Catholic Church is universal and parochial, individual and communitarian. No person or family, however well intentioned, can hope to live or learn the Catholic faith separate from the life of the parish (*General Catechetical Directory* #17; *National Catechetical Directory* #32; *Catechesi tradendae* #20-26, #67). Home schooling families, therefore, need to take part in the life of the parish and to look to their pastors for guidance particularly regarding the religious education of their children, as their pastors share the



responsibility for seeing that the children are properly prepared to participate in the Church's sacramental life.

3.3. Those wishing to provide catechetical instruction or sacramental preparation in the context of a home-based program have to:

3.3.1. follow diocesan curriculum guidelines,

3.3.2. utilize approved textbooks only,

3.3.3. have their religious education program approved by their pastor,

3.3.4. establish methods of evaluation, and

3.3.5. submit the results to their pastor or his representative.

Article 1300 • Schools Policies Handbook

The *Handbook of Policies for Catholic Schools* is published by and available through the Diocesan Office of Catholic Schools. This handbook is incorporated into these *Articles of Diocesan Policy* by reference only but is to be read, understood, interpreted, and applied as such.

Article 1400 • Political Activity

1. The Church takes her role in the public sphere from the example of Jesus Christ who calls Christians to "render unto Caesar that which is Caesar's" (Mark 12:17). Catholics are morally obliged to involve themselves in the life of the community, and where possible, to participate in government. While the Church provides guidance in moral matters, she does not endorse candidates, political parties and ideologies or philosophies of government. To that end, legal representatives of the Church have to tread carefully both to stand by the teachings of Jesus Christ and to abide by legitimate local, state and national laws.
2. Historically, the Catholic Church in Louisiana has shown great commitment to the temporal as well as the spiritual needs of the state's citizens and has exercised highly visible leadership. Its help is sought by and readily given to city, state, and federal authorities not only during times of crisis but also over the long-range through day-to-day collaboration with government agencies.
3. Additionally, the Church is a major contributor to the society at large. Her widespread social services are well known. Many church buildings and museums are tourist attractions. Employing thousands of men and women, the Church contributes heavily to the economy. The education provided by Catholic schools constitutes a significant savings to the public treasury. Catholic education enjoys a proud heritage—particularly for its outreach to the poor, which helps ensure the future stability of society. Most of all, the Church's very presence defends ethical standards and values and lends credibility to certain legal and legislative measures.
4. Within this context, the Church is not an entity distinct and apart from society and culture. It does not attempt to create a parallel reality. Rather, the Church works within the social fabric to correct injustice and to establish the reign of Christ on earth. This effort is not universally appreciated or accepted. Nor is the Church immune from attacks or hindrances levied against her by individuals, organizations, and even governmental bodies.
5. Parish, school, and other Church-owned facilities are not to be used for any activity related to the support of or opposition to any candidate for political office, nor as places for partisan debate. The pulpit, especially, is never to be used by candidates

or incumbents to advance their political views or their positions. Moreover, the pulpit is not to be used as a forum by any individual—even a priest or deacon—to support or oppose a candidate, public official, or a political position. Parish bulletins, websites, newspapers, or other means of communication are never to be used for these same purposes. Official parish or school stationary or other displays are also not to be used in this way. *The Church Today*, all other Catholic bulletins and publications, as well as any other media controlled or owned by the Church are not to accept political advertising. Thus, posting political signs or billboards is not permitted on Church property—including ball fields and recreational areas not typically seen as belonging to the Church or its schools. However, parishes may hold non-partisan candidate forums, all-inclusive parish voter education programs, and voter registration drives.

6. All candidates or incumbents running for an office have to be invited to events such as non-partisan forums and voter education programs. None may sponsor meals or curry favor in other ways at these events. To the degree that non-parish organizations (such as various groups with national charters) utilize church property, they also are to avoid partisan politics.
7. No funds or in kind donations whatsoever from any parish, school, or Catholic group may be contributed to any political action committee, political candidate, political campaign, or political party.
8. Only authorized political materials may be distributed by the diocese, parishes, or organizations. Authorized materials are those which have originated from the United States Conference of Catholic Bishops, the Louisiana Catholic Conference, or the Diocese of Alexandria. This policy specifically prohibits the distribution of voter guides by organizations that represent themselves as Catholic but are not officially part of the Church.
9. Practical advice on how to conduct legitimate activities can be found on the Faithful Citizenship website, which sponsored by the United States Conference of Catholic Bishops ([www.faithfulcitizenship.org](http://www.faithfulcitizenship.org)). There are specific Internal Revenue Service regulations that must be followed.

10. Obviously, individual representatives of the Church—clergy as well as laity—have every right to hold opinions on these matters. They are obliged, however, to ensure that their private opinions are never expressed as the official position of the Catholic Church, or the Diocese of Alexandria, or the particular ecclesial parish or organization which they may represent or to which they may belong.
11. These policies do not entirely prohibit the honoring of public officials or the facilitation of community activities. For example:
  - 11.1. 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 another occasion. For example, an Inauguration Mass on the day the oath of office is to be taken is permissible.
  - 11.2. While hosting a victory party in the parish hall is not acceptable, hosting the inauguration itself or a reception afterwards is acceptable.
  - 11.3. With the permission of the diocesan bishop, parish property may be used as a polling place.
12. The modern democratic system of government relies upon constituents contacting their elected representatives to show support or opposition for specific causes or proposed legislation. This exercise of free speech is good and necessary. As such, these measures are recommended for individual clergy and laity.
  - 12.1. Regularly access the Louisiana Conference of Catholic Bishops (LCCB) website <http://www.laccb.org/> for the latest information, issues, and specific bills of interest or concern to the Church in Louisiana.
  - 12.2. Contact local, state, and national legislators using the links available and with reference to the "Dos and Don'ts" listed there.
  - 12.3. Download from the respective websites and review USCCB and LCCB position papers on issues. These may be used as bulletin inserts, or they may be summarized in bulletin articles provided that balance and accuracy are maintained.

- 12.4. Pastors of legislators or other public officials ought to develop an open dialogue with these individuals and keep them apprised of the Church's interest in specific bills and issues. All pastors should be encouraging and enthusiastic about the Church's teaching. Some study may be required of the pastor and the legislator. The same principles apply to pastors of other influential persons, e.g., civic leaders, judges, business leaders, etc. regarding their respective spheres of influence.
- 12.5. If a pastor and/or laity wish to travel in person to the state capital, they are asked to first contact the Executive Director of the Louisiana Conference of Catholic Bishops, well prior to the visit. He may be able to provide important tips and logistical details. The telephone number is 225-344-7120.
13. To paraphrase a statement released by the United States Catholic Conference: "We . . . 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 . . . to analyze the moral dimensions of the major issues of the day." (September 1, 1987)

Article 1500 • Prison Ministry

1. Federal, state, and local jails, prisons, detention centers, or other such institutions which do not employ a Catholic cleric as a chaplain are to be considered places especially needing pastoral care from the territorial parishes in which they are located. While they are not missions in the sense of Canon 516, they are the spiritual responsibility of the pastor of the place, who should develop lay ministers and ministries to serve the prisoners and their families as well as the personnel of the prison and their families. The needs of prison ministry shall be considered in the pastoral appointments of clergy.
2. A parish responsible for such an institution should coordinate with the competent law enforcement agency to arrange for the sacraments and especially for Mass, to be celebrated regularly. Other ministries may include but are not limited to instruction in the faith, bible studies, ecumenical services, and prayer groups. A parish with a prison should cooperate with existing programs and prison chaplains. When spiritual programs are needed but do not exist in a given prison, a parish may help establish them.
3. When clergy engage in prison ministry, they ought to provide sacramental care, counseling insofar as they are able and qualified, instruction in the faith, and other services requested and approved by the institution and the diocese. Clergy and laity in this apostolate must not provide legal advice even if they are also civil lawyers, bring in or take away unapproved items, or engage in any other behavior not specifically approved by the competent authorities.
4. Where prudent, willing lay persons should be formed and instructed to provide spiritual and intellectual assistance to detainees. Often, parishioners who were themselves once incarcerated are invaluable in this regard. When approaching individuals to assist with prison ministry, prudence and complete disclosure are essential. This kind of work calls for a special kind of person and the burnout rate is unusually high.
5. When lay persons engage in prison ministry, their visit may include at the discretion of the competent authorities:
  - 5.1. private visitations with inmates (with counseling if qualified),

- 5.2. liturgies of the Word with or without Holy Communion,
  - 5.3. bible study or catechetical Instruction, and
  - 5.4. arrangements for a pastoral visit by a priest or deacon.
6. At the discretion of the institutional authorities, a lay person may also assist detainees in non-religious ways such as teaching literacy, or serving as a contact person with a detainee's family. These services are to be lauded and may be a first step toward sharing faith or providing religious assistance.
  7. Coordination or cooperation with other Christian denominations, non-Christian religious workers, and communities is often essential in prison ministry.
  8. Both clergy and lay volunteers ought to make an effort, insofar as it is possible, to conduct follow-up visits with detainees after they are released. These visits may include counseling, further instruction, or even charitable activities. The opportunity should not be lost to invite the newly released person to ongoing conversion and regular participation in church membership.
  9. Periodic reports concerning a parish's ministry to a prison are to be made to the diocesan prison ministry coordinator, who in turn will provide an annual report to the diocesan bishop.



Article 1600 • Assurances of Child Protection and Professional Conduct

1. *The Diocesan Policy for the Protection of Minors* and the following additional policies, which were enacted by the United States Conference of Catholic Bishops in connection with the *Charter for the Protection of Children and Young People and The Essential Norms* of the Holy See are hereby approved and incorporated by reference into these Articles of Diocesan Policy and are to be read, understood, interpreted, and applied in the same way:
  - 1.1. *Diocesan Communications Policy*
  - 1.2. *Diocesan Policies Concerning Background Investigations*
  - 1.3. *Diocesan Policies Regarding Protection of Minors in the Steubenville South Program*
  - 1.4. *Diocesan Policy/Guidelines for Supervision of Minors on Trips and Other Functions*
  - 1.5. *Diocesan Code of Pastoral Conduct*
2. The following protocols are hereby approved and ordered for implementation in the Diocese of Alexandria
  - 2.1. *Protocol for the Victim Assistance Coordinator*
  - 2.2. *Protocol for the Administrator/Assessor*
  - 2.3. *Protocol for the Receptionist(s)/Secretaries* who receive telephone calls concerning the sexual abuse of a minor.
3. All of these actions are taken in accord with the *Charter and The Essential Norms* for the purpose of providing a safe environment for minors in the Diocese of Alexandria.
4. The documents mentioned above are published separately and are available from the diocesan office and from the website in Spanish as well as English. See Safe Environment or *Ambiente Seguro* Sections of "Download Documents."
5. The Liability and Medical Release and Request to Participate Forms are incorporated by reference, into these Articles of Diocesan Policy and are to be

Articles of Diocesan Policy

read, understood, interpreted, and applied in the same way. The appropriate form has to 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, parish, or school level. Exceptions must be approved in writing by the diocesan bishop.

## Section II. Laity in Particular

### Article 2100 • Employees of the Diocese and Parish

1. The employer-employee relationship exists when officers or agents of the diocese, parish or their subsidiaries 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. Seminarians, organists, and others are always classified as employees subject to withholding since they receive direction from the employer; these and others have sometimes been mistakenly classified in other ways.
2. Each parish is incorporated at civil law in the state of Louisiana. This incorporation is associated with a Federal Employer Identification Number (EIN). It is required to file all IRS tax forms.
3. All parishes and their subsidiaries must observe all civil laws, as required by canon 22, including both federal and state laws regarding employment taxes.
4. Regardless of any practices to the contrary, all non-profit organizations are required to withhold and pay social security (FICA) taxes.
  - 4.1. The current employee FICA rate is 7.65%.
  - 4.2. The employing organization is required to match the employee FICA withheld and to forward both contributions to the IRS. The frequency of payment (weekly, monthly, or quarterly) is determined by the amount of FICA owed.
  - 4.3. A quarterly report Form 941 must 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 quarter. At the time of hiring as well as anytime the employee wishes withholding to be changed, the state L-4 and the Federal W-2 must be completed
  - 4.4. 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. Since it requires compliance with civil law, the Church claims no exemption in employment tax matters.

4.5. More detailed information and instructions on social security withholding and reporting can be found in IRS publication *Circular E - Employer's Tax Guide*. This circular is available at the local IRS office and online. Additionally, federal and state taxes must also be withheld and paid on behalf of employees. Contact the Diocesan Business Office for assistance if needed. Form W-2 must be prepared and distributed annually by January 31 to all employees including secular priests and religious priests who are paid personally.

5. Form I-9 Immigration Reform and Control Act of 1986.

5.1. 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.

5.2. 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 citizen of the United States.

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

5.3.1. Have employee fill out his other part of the Form I-9 when he or she begins employment.

5.3.2. Check employee's documents to verify identity and eligibility to work.

5.3.3. Complete the employer review and certification part of Form I-9.

5.3.4. Retain Form I-9 for three (3) years, or if the employee works less than three (3) years, for one (1) year after the employee terminates employment.

5.3.5. Present Form I-9 for inspection upon request by the Department of Labor within three (3) days of notice.

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

5.5. For further information, contact the Diocesan Business Office.

6. The diocese must comply with the requirements of the Family Medical Leave Act (FMLA) when it applies. Contact the Diocesan Business Office for details.

## 7. The Dismissal of Employees

7.1. Before any employee—including a teacher or other school personnel—is dismissed for any reason whatsoever the Diocesan Business Office is to be contacted.

## 8. Unemployment Compensation (FUTA)

8.1. Non-profit tax-exempt 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.

8.2. 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's name) is not applicable and is being returned to your office without action."

8.3. For additional information, contact the Diocesan Business Office.

## 9. The Diocesan Group Health Plan

- 9.1. The Diocesan Business Office administers a group health insurance program whereby employees of all employing organizations in the Diocese of Alexandria—except St. Mary’s Training School—may obtain individual or family coverage on a shared cost basis. To be eligible, an individual must be a full time employee, i.e., working twenty (20) hours or more per week.
- 9.2. 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 employee paying remaining portion and any family add-on coverage. All payment of premiums is handled through payroll deduction.
- 9.3. 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, which is sixty-five percent (65%) of the premium, as published annually by the Diocesan Business Office.
- 9.4. 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 Late Entrant form must be completed, and the applicant must wait for six months before coverage becomes effective. No such form is required if enrollment is within the initial period.
- 9.5. An employee's participation in the group insurance plan ends upon termination of employment. Benefits, however, may 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.
- 9.6. Full details of the group health insurance, its costs, and coverage can be obtained from the Diocesan Business Office.

## 10. The Lay Employee Retirement Plan

- 10.1. This plan is designated as “a defined contribution program”, which means the amount to be paid for each participant is specified. The benefits available to the participant at time of retirement depend on various factors such as number of years in program, earning levels, etc.
- 10.2. The plan is open to employees of diocesan and parish organizations who work 1,000 hours or more in the calendar year. To receive employer participation, an employee must have completed three (3) years or more of service at any employing organization.
- 10.3. Employer participation is automatic. The employing organization must participate and fund the plan.
- 10.4. 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 each year as follows:
  - 10.4.1. Year 1 of participation • 1%
  - 10.4.2. Year 2 of participation • 2%
  - 10.4.3. Year 3 of participation • 3%
  - 10.4.4. Year 4 of participation • 4%
  - 10.4.5. Each year thereafter • 5%
- 10.5. Contributions are made semi-annually on June 30 and December 31 of each year. Each employing organization will receive a package from the Diocesan Business Office outlining the program prior to those dates, ordinarily by May 15 and November 15.
- 10.6. An individual has a vested interest in the contribution made on his or her behalf upon deposit of the funds with the custodian. This means ownership of the funds transfer to the participant when his or her individual retirement account is credited. This ownership is irrevocable and non-forfeitable subject to applicable laws and governmental regulations.
- 10.7. More information on the retirement program can be obtained from the Diocesan Business Office.

## 11. Worker's Compensation

- 11.1. 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. See Article 8700.
- 11.2. 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 laws and regulations.
- 11.3. State law requires the completion of a First Report of Injury for all employee related occupational injuries. For information contact the Diocesan Business Office.
- 11.4. The Sedgwick Group handles day-to-day claims. For additional information, contact the Diocesan Business Office.
- 11.5. Any accident or injury that results in an employee's death, disability or absence from work for more than seven days must also be filed with the State Office of Workers Compensation.



## Section III. Clergy in the Diocese of Alexandria

### Article 3100 • The Ministry and Life of Priests

1. Priests are called by the Church to a life of ministry. The number of hours he devotes to his calling should be determined by the needs of the people he serves and the nature of his assignment—not by a clock or calendar. Priestly ministry is more than a job; it is a vocation.
2. A priest's time is to be allocated among many duties: the celebration of Sunday and weekday Masses; administration of the sacraments; personal prayer—especially the obligation of praying the Liturgy of the Hours; visiting individuals and families as well as the sick and shut-ins; homily preparation; parish administration; meetings; teaching; counseling; personal study; continuing education; and other ministerial activities.
3. It is also appropriate for the priest to take time for exercise and sustained periods of rest and leisure. However, when funeral services are requested on a priest's usual day off, the funeral takes precedence. It is not sufficient that another priest is available unless the priest requested is actually away on vacation. As ones called and sent to serve and not be served, clergy should graciously accept opportunities to make sacrifices.
4. In a parish with only a single priest, whether a pastor or administrator, a secretary or someone known to other parishioners is always to know how to reach him. All priests are encouraged to be available by cell phone.
5. In a parish with two or more priests, communication among those sharing a parish assignment is expected. Each is to know how to contact the other.
6. In parishes with more than one priest, the pastor or administrator approves the daily schedule.
7. Parochial vicars are accountable to their pastors or administrators for the ministry they share and should report to them on their activities at least weekly or more often if necessary.

8. Pastors and administrators should be solicitous for the well-being of their associates and insofar as they can share with them their own approaches to ministry, as taught by the Second Vatican Council in the *Decree on the Ministry and Life of Priests*:

It is very important that all priests, whether diocesan or religious, help one another always to be fellow workers in the truth. Each one, therefore, is united in special bonds of apostolic charity, ministry and brotherhood with the other members of this priesthood. This has been manifested from ancient times in the liturgy when the priests present at an ordination are invited to impose hands together with the ordaining bishop on the new candidate, and with united hearts concelebrate the Sacred Eucharist. Each and every priest, therefore, is united with his fellow priests in a bond of charity, prayer and total cooperation. In this manner, they manifest that unity which Christ willed, namely, that his own be perfected in one so that the world might know that the Son was sent by the Father.

Older priests, therefore, should receive younger priests as true brothers and help them in their first undertakings and priestly duties. The older ones should likewise endeavor to understand the mentality of younger priests, even though it be different from their own, and follow their projects with good will. By the same token, young priests should respect the age and experience of their seniors; they should seek their advice and willingly cooperate with them in everything that pertains to the care of souls.

In a fraternal spirit, priests should extend hospitality, cultivate kindness and share their goods in common. They should be particularly solicitous for the sick, the afflicted, those overburdened with work, the lonely, those exiled from their homeland, and those who suffer persecution. They should gladly and joyfully gather together for recreation, remembering Christ's invitation to the weary apostles: "Come aside to a desert place, and rest awhile" (Mk 6:31).

And further, in order that priests may find mutual assistance in the development of their spiritual and intellectual life, that they may be able to cooperate more effectively in their ministry and be saved from the dangers of loneliness which may arise, it is necessary that some kind of common life

or some sharing of common life be encouraged among priests. This, however, may take many forms, according to different personal or pastoral needs, such as living together where this is possible, or having a common table, or at least by frequent and periodic meetings. One should hold also in high regard and eagerly promote those associations which, having been recognized by competent ecclesiastical authority, encourage priestly holiness in the ministry by the use of an appropriate and duly approved rule of life and by fraternal aid, intending thus to do service to the whole order of priests (*Presbyterorum ordinis*, no. 8).

Article 3150 • Terms of Office for Priests

1. Pastors

- 1.1. Pastors of parishes shall enjoy a term of six (6) years even if the letter of appointment does not specify a term.
- 1.2. The diocesan bishop may appoint pastors to additional terms.
- 1.3. Priests who are not incardinated in the Diocese of Alexandria may be appointed pastors, but 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 the diocesan bishop decides otherwise.

3. Religious Priests

- 3.1. These same norms govern the assignment of religious priests to diocesan offices with due regard for more extensive rights established by written agreement between the diocesan bishop and a competent religious superior (c. 520, §2).
- 3.2. 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.

4. Other Appointments

- 4.1. The diocesan bishop will determine the length of other appointments made in conjunction with the office of pastor or parochial vicar or apart from it.

Article 3175 • Residence in the Rectory

1. Residence in a parish rectory for a period of more than thirty (30) days requires a diocesan assignment or written permission of the diocesan bishop. The pastor alone may grant temporary residence of less than thirty (30) days at his discretion.
2. Anyone to whom the diocesan bishop grants permission for residence by reason of some connection to the pastor (e.g., a parent, sibling, etc.) loses that right when the pastor's assignment ends. If the pastor dies, the person may remain for up to thirty days from the day of death. Those who live in residence without a diocesan assignment must provide just remuneration in an amount approved by the diocesan bishop.
3. Pastors and those who take their place have the right to establish just rules and order within their rectories. They may, according to their judgment, limit access to certain areas or establish other just requirements of those living and working there to prevent scandal, provide for a safe living environment, and protect parish property.
4. Clergy who have pets are liable for them. They are also responsible for protecting the parish property from damage. If the pet damages parish property, the owner is responsible for paying for the repairs. Responsibility for assessing the damage and the adequacy of the repairs belongs to the Diocesan Building Review Committee. At the direction of the diocesan bishop, clergy compensation may be adjusted to reimburse a parish harmed under these circumstances.
5. Pets of any kind are private—not parish—property, and all costs associated with them belong to the owner.
6. Pets are not allowed in churches and other public spaces except “service animals”.

Article 3200 • Supply Coverage

1. A pastor is obliged to provide Sunday Mass coverage in all circumstances except grave, unexpected illness. In this case, the ritual for “The Sunday Service in the Absence of a Priest” is employed. The pastor may provide weekday Masses at his discretion.
2. The pastor is obligated to negotiate for supply coverage well in advance, at least a month or more. The dean should be ready and prepared to assist him.
3. When the priest is away from the parish for vacation within the time allotted, his own illness, or parish business, the parish pays the costs of coverage. The diocese pays if the priest is on diocesan business. Otherwise, the priest, himself, pays for the coverage. More information on vacation appears in Article 3750, 8.

4. *Honoraria*

- 4.1. All clergy who hold a diocesan assignment, regardless of incardination, receive a just wage for their sustenance. As such, none may receive an *honorarium* for celebrating a Sunday or weekday Mass within the diocese. No additional gifts may be given to those who supply coverage.
- 4.2. Those clergy who do not hold a diocesan assignment receive an *honorarium* of \$45 for the celebration of Mass. If they so desire, they may choose to donate that *honorarium* back to the parish, but it is to be offered in full within a reasonable amount of time.
- 4.3. *Honoraria* are not to be offered or accepted for the celebration of the other sacraments but may be offered for exceptional services, e.g., retreats, missions, catechetical events, youth ministry, etc.
- 4.4. For tax purposes, priests who receive *honoraria* in excess of \$600 in a given calendar year are to receive an IRS Form 1099 from the parish.

5. Stipends

- 5.1. Mass Stipends are addressed in Article 3300.

- 5.2. Priests may receive only one Mass stipend per day (cc. 948, 950, and 951). When a priest supplies coverage at a Mass for which a stipend has been provided, he is entitled to that stipend. When he supplies for several Masses of this kind, he receives the stipend for the first Mass, and all other stipends are disposed according to the policy in Article 3300.
- 5.3. If no stipends are offered for the Masses for which a priest supplies coverage, he is not compensated or paid any additional amount.
6. Travel Expenses are paid in accord with Article 3750, 2.
7. In the case of a priest who must travel some distance to supply coverage, the parish may well, in justice, provide him with food and/or lodging. Usually this hospitality is provided by a parishioner cooking a meal and the rectory being made available, but other arrangements may be made if necessary.

Article 3300 • Mass Stipends and Other Offerings

1. Priests are to offer Holy Mass for the intentions of the faithful without any requirement or demand of remuneration. To do otherwise is simony.
2. The *Code of Canon Law* (c. 534) requires that every pastor offer one Mass *pro populo* in his parish on every Sunday and Holy Day of Obligation. If that is impossible due to illness or travel, he may delegate that Mass to another priest or celebrate it elsewhere. The Mass *pro populo* is offered without a stipend by the pastor. If another priest offers it in the place of the pastor, the pastor is to offer him the usual stipend.
3. The faithful should 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” (“*Mos iugiter*”, *Acta Apostolicae Sedis* (AAS), 83[1991], art. 7).
4. At the same time, priests are reminded that the Second Vatican Council taught, “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” (*Presbyterorum ordinis*, art. 17).
5. If the faithful request a Mass and wish to offer a stipend, the set amount is \$5.00 (c. 952). They may offer any amount they wish above or below this amount. More may be accepted only if it is freely offered. There should be no appearance of commerce concerning Mass stipends (c. 947). There are to be no distinctions among kinds of Masses or higher rates for special services. See *Mos iugiter*, *loc. cit.*, art. 3.
6. When the faithful are unclear about the number of Masses they wish to have offered, their contribution is divided by \$5 and that number of Masses is to be scheduled for the stated intention.



7. The faithful do not have a right to have their intention offered on a certain day or time, but pastors ought to try to accommodate all reasonable requests as much as possible.
8. When the faithful request Masses for the same day or regularly request more Masses than the parish can offer within a year, the pastor may allow a "collective Mass intention." In this circumstance, the stipends offered by several persons with the associated intentions are combined. The priest receives only the usual \$5.00 stipend, and the remainder is distributed to the Priests' Retirement Fund. Because of the exceptional extraordinary nature of a collective Mass intention, only two such Masses may be offered each week per parish, and the faithful must consent for their intentions to be combined. (See *Mos iugiter, loc. cit.*, art. 2, §1.) The date, time, and place of all such collective Masses are to be published.
9. Offerings made for special collective intention Masses on All Souls' Day or some other occasion are to be treated as stipends, and all norms for collective Mass intentions are to be followed.
10. When no intention is requested for a scheduled Mass, the priest may offer his own intention. A stipend is paid 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 pray for his own.
11. The *Code of Canon Law* prohibits scheduling Masses with stipends more than twelve months in advance (c. 953). Intentions more than a year away are not to be accepted without the explicit written permission of the diocesan bishop.
12. No priest may accept more than one Mass stipend per day (cc. 948, 950, and 951).
13. If the faithful freely offer a stipend for other services (e.g., baptisms, weddings, or funerals), the gift, sometimes called a "stole fee", is presumed to be given to the parish and are to be placed in the general account of the parish in which the services are rendered. If the person specifies that the gift is being given to the individual priest or deacon, he may keep it (c. 1267, §1; 531; and 551).
14. Accounting
  - 14.1. Stipends are deposited in the parish operating account (Chart of Accounts [COA] #5300) or in a separate checking account.

- 14.2. When a priest is unable to accept the stipend for a Mass (e.g. the priest offers multiple Masses in a day or a "collective intention" Mass is offered), the extra stipends are disbursed to the Priests' Retirement Fund. This amount should be sent in a single monthly check to the Diocesan Business Office clearly indicating that the extra stipends are for the Priests' Retirement Fund.
- 14.3. A simple journal of all Mass intentions and associated stipends is to be kept in each parish. As the Masses for these intentions are scheduled, they are to be published. At least monthly, the pastor, after verifying that each intention has been fulfilled, should see that checks are issued corresponding to the stipends owed each priest and the Priest's Retirement Fund. The check for the retirement fund is to be sent to the Diocesan Business Office monthly. Priests are forbidden simply to accept five dollars (\$5) per day because the stipend system is cumbersome. As with the priest's salary, his monthly stipend check is not to be combined with any other payment.
- 14.4. Priests are also to maintain a record of the stipends they receive from Masses and from other services. These constitute earned income and ought to be added to the amount reported on the line for "Wages, salaries, tips, etc." on IRS Form 1040.
- 14.5. When more single intention Masses are requested than the parish can offer, the stipends, with their intentions, are to be sent to the Chancery, which will distribute them to smaller parishes or to retired priests. In this case, a letter listing each intention and the stipend associated with it is to be sent with a single check for all the stipends to the Chancery.

Article 3400 • Deacons

1. The following article, which outlines the duties and rights of deacons in the Diocese of Alexandria, applies mainly to those deacons not expecting to transition to priesthood, the so called “permanent diaconate.” However, both universal and/or diocesan law binds all deacons to some of these obligations.
2. All deacons—unless explicitly stated otherwise herein or in his letter of appointment from the diocesan bishop—are expected to abide by all Articles of Diocesan Policy.
3. In accord with their faculties, deacons serve the People of God in the ministry of the word in communion with the diocesan bishop and his presbyters (c. 757).
4. Deacons are obliged to pray for the universal Church and are required to include as part of their daily prayer those parts of the Liturgy of Hours known as Morning and Evening Prayer. Whenever possible, they should lead these prayers for the communities to whom they minister.
5. All deacons ministering in the Diocese of Alexandria are to have completed an academic program approved for deacons and to have received spiritual formation as well as training in pastoral ministry.
  - 5.1. Only baptized men can be considered candidates for the diaconate (c. 1024).
  - 5.2. They are to be at least 35 years of age by the time of ordination to the permanent diaconate.
  - 5.3. In addition, they are to have demonstrated personal maturity and integrity, evidence of spiritual growth, commitment to Catholic values, leadership ability, and responsible management of their personal finances.
  - 5.4. Married candidates are to have unions that are stable, reputable, and presumably valid in the eyes of the Church.
  - 5.5. It is expected that the wives of the married candidates participate substantially in the formation process, and their explicit consent is to be obtained before their husbands are accepted as candidates.

6. The diocesan bishop may appoint a director of deacon personnel to recruit and screen candidates and to provide for their training and evaluations both before and after ordination. The ordinary term of office for this director is three years, but the term may be renewed by the diocesan bishop.
7. Ordinarily, the diocesan bishop will appoint a deacon to a pastoral assignment after consultation with the director of deacon personnel, the deacon, the pastor or the diocesan director to whom he is to be assigned, and the dean.
8. The normal term of pastoral assignment is three (3) years and may be renewed by the diocesan bishop, who will usually consult the parties concerned.
9. A deacon ordinarily remains in his lay profession on a full-time basis. The diocesan bishop may permit permanent deacons to engage in paid ministry in individual cases. Some permanent deacons work in Catholic institutions or professions for which ordination is not a condition for employment. Ministerial assignments require an appointment by the diocesan bishop. In employment for which ordination is not a prerequisite, a permanent deacon is treated in law and fact as a layperson.
10. Thus, a deacon ordinarily earns no income from his ministry, nor is he furnished room and board. He receives reimbursement the same way as other clergy for mileage and for out of pocket expenses.
  - 10.1. However, if the diocesan bishop permits the deacon to receive compensation for ministry, he can so direct the parish or organization employing the permanent deacon in the letter of appointment or in some other way.
  - 10.2. If the diocesan bishop permits a deacon to receive compensation for full-time ministry, the deacon shall earn at least as much as a priest, and if the diocesan bishop permits him to receive compensation for part time ministry, the deacon shall receive a smaller salary computed on a pro-rata basis.
  - 10.3. If the diocesan bishop permits a deacon to receive diocesan hospitalization and life insurance, the premiums are to be paid in full for a deacon compensated for full time ministry and on a pro-rata basis for part time ministry. In such cases, a deacon's spouse and dependents may participate in the diocesan plan for lay employees at their own expense.

- 10.4. If the diocesan bishop permits, the Diocesan Lay Retirement Program is to be made available to deacons in compensated ministry.
11. The parish or employing organization shall assume costs of an annual retreat, continuing education, and automobile or other travel expenses incurred in the ministry of all deacons at the approved diocesan rate.
12. As the wives of deacons are expected to participate in the program of continuing development with their husbands, reasonable costs for their further education are to be paid by the parish or employing organization.
13. Voluntary offerings or stipends given to a deacon are presumed to be given to the parish. He may retain only gifts expressly given to him personally (c. 1267, §1; 531; and 551).
14. A parish is expected to supply the ritual books as well as other books and materials necessary for ministry and continuing formation of all permanent deacons. At least one set of vestments appropriate for the deacon is also to be provided by the parish or unit of assignment.
15. A job description, written agreement, and/or the letter of appointment received from the diocesan bishop may specify further how the deacon is to conduct his ministry.
16. Each of these documents cannot be contrary to the *Code of Canon Law* and the *National Directory for the Formation, Ministry and Life of Permanent Deacons in the United States*.
17. Deacons shall have their interests represented on the clergy continuing formation committee of the presbyteral council.
18. As clerics, permanent deacons need permission from the diocesan bishop to write articles in periodicals, and they have to observe the statutes of the episcopal conference regarding participation in radio and television programs that treat questions of Catholic doctrine and morals (c. 831).
19. Deacons are required to wear liturgical vestments while ministering at the Eucharist (c. 929). Deacons are not to recite prayers proper to the priest, especially the

Articles of Diocesan Policy

Eucharistic prayer, nor to perform liturgical actions proper to a priest (c. 943). At other rites and liturgical celebrations, they are to wear the garb specified in the liturgical books for deacons.

20. Otherwise, deacons are to resemble the lay faithful in dress and manner of lifestyle. The appropriate form of address, according to the Congregation for the Clergy, is only "Deacon."
21. Deacons "are not to have an active part in political parties and in governing labor unions unless," in the judgment of the diocesan bishop, "the protection of the rights of the Church or the promotion of the common good requires it," (c. 287, §2 and 288)
22. Deacons may enter business, join political parties and labor unions, and generally are encouraged to be active in community and civic affairs while observing the *Articles of Diocesan Policy* on political activity.
23. The incardination or excardination of deacons is to be done in accord with canons 265-272 of the *Code of Canon Law*.

Article 3500 • Clerical Attire

1. In accord with canon 284, clerics, priests and deacons both transitional and permanent, are to dress in conformity with their sacred calling. While the Code of Canon Law does not obligate permanent deacons to wear ecclesiastical garb (canon 288), each diocesan bishop may determine and promulgate exceptions to this law and specify the appropriate clerical attire to be worn.

1.1. In liturgical rites, all clerics shall wear the vesture prescribed in the proper liturgical books.

1.2. Outside of Liturgical Functions

1.2.1. Priests and transitional deacons typically wear the Roman collar with the black clerical suit or the black cassock with collar.

1.2.2. Religious clerics dress in accord with the determinations of their proper institutes or societies.

1.2.3. In the the Diocese of Alexandria, permanent deacons are to wear clerics as a sign of their state. The Roman collar with black clerical suit or black cassock with collar may be worn when engaged in ministry outside of the liturgy or in active work for the good of the Church and the care of souls.

1.2.4. Seminarians who are not clerics do not wear clerical street attire; they may wear the Roman collar with a cassock but only at liturgy. While at the seminary, they are to follow the regulations of the school.

Given at our chancery in Alexandria on this 10<sup>th</sup> day of July, 2017.

All things to the contrary notwithstanding.

Article 3600 • Continuing Formation of the Clergy

1. Clergy are ordained to serve the people of God. The initial training received in the seminary or diaconate formation can only be the beginning of a life-long process of development and growth. The constant progress of peoples and cultures requires that the cleric constantly seek to better himself as a person, a disciple, a teacher, and a pastor. This great work requires ongoing human, spiritual, intellectual, and pastoral formation. To this end, the diocesan bishop may establish a continuing formation committee as a standing committee of the presbyteral council and appoint both its membership and chairman.
2. The chairman of this committee is to be personally committed to his own development as well as that his brother clergy. He should search continuously for resources to address the specific needs of the presbyterate and diaconate, which include the intellectual and practical as well as the spiritual and religious.
3. Practically, the committee provides for
  - 3.1. an annual retreat for priests,
  - 3.2. clergy days centered around some topic relevant to priest and/or deacons of this diocese,
  - 3.3. regular and special spiritual activities,
  - 3.4. resources to facilitate private study and spiritual growth, and
  - 3.5. other events or activities at the request of the clergy.
4. From time to time, this chairman is to report the activities of the committee to the presbyteral council.



Articles of Diocesan Policy  
Article 3700 • Clergy Salary

<b>Priests in a Diocesan Assignment (FY 2023-24)</b>	
Earned Income	\$2,116
Professional Expense Allowance	\$485
<b>Total Monthly Compensation</b>	<b>\$2,601</b>

<b>Transitional Deacons (FY 2023-24)</b>	
Earned Income	\$890
Professional Expense Allowance	\$485
<b>Total Monthly Compensation</b>	<b>\$1,375</b>

1. Without exception, every cleric is to accept from the parish his entire compensation as provided in this policy. If a parish is unable to compensate the clergy fully, that fact has to be made known immediately in writing to the diocesan bishop and the Diocesan Business Office. Compensation is an acquired right. If a cleric wishes, he may contribute any portion of his salary back to the parish or to the diocese as a gift.
2. Reimbursements for ministry expenditures (including mileage) are not compensation. All clerics are entitled to a just reimbursement of valid expenditures without reference to compensation.
3. Accounting
  - 3.1. "Earned Income" is recorded under COA #6010.
  - 3.2. "Professional Expense Allowance" is recorded under COA #6015.
  - 3.3. Monthly payments are to be made and may be made only after the 20th of each month in which services are rendered.

- 3.4. The compensation check may not include any other payments or reimbursements.

#### 4. Tax Forms

- 4.1. When creating the W-2 for a secular cleric, "Box 1, Wages, salaries, tips etc." is the only box which has a dollar amount. Religious priests who receive their pay personally (i.e., in their own names) are treated as secular priests for tax purposes. Religious priests who receive their pay through their orders do not receive a W-2 from anyone.
  - 4.2. The W-2 Form is to be prepared and distributed to the clergy who have been paid by the parish any time in the calendar year by January 31. The same form for lay employees should be prepared and likewise distributed in January. Any other IRS or state tax requirements must also be met.
  - 4.3. Clergy must properly document the professional expense allowance. The income in excess of expenses becomes taxable income reportable to the IRS.
  - 4.4. A professional tax advisor familiar with clergy tax returns ought to be employed to make sure that the professional expense allowance is properly reported. Such a professional may also be utilized by clergy in calculating the amount of self-employment tax paid that is based on the fair market value of room and board ("parsonage") in the filing and paying of income tax. When clergy become disabled or retire, they shall qualify for and receive social security income proportionate to the taxes they have paid.
  - 4.5. Contributions to a Roth IRA, standard IRA or other retirement investments granted tax advantages by the government are an expected part of the clergy's good stewardship. At retirement, they are expected to have saved for their needs utilizing these and other means.
5. As stated above (Article 3400), deacons in the Diocese of Alexandria not expecting to become priests do not receive stipends or salaries. Deacons may be employed by parishes and paid for professional services, but not for their ministry unless the diocesan bishop provides otherwise.

6. Deacons are also entitled to the same reimbursement for mileage (COA #7021) and room and board (COA # 7460) as transitional deacons. When only a partial month is served, payments are pro-rated and issued prior to departure from the parish. For the purposes of taxation, seminarians are lay persons employed by the parish.

7. Monthly Compensation for Retired Incardinated Priests:

<b>Retired Incardinated Priests (FY 2023-24)</b>	
Retirement Benefit	\$592
Housing Allowance	\$1,777
<b>Total Monthly Compensation</b>	<b>\$2,369</b>

7.1. Priests may request retirement from the diocesan bishop at the age of 70. They may request retirement earlier citing reasons of health or other special circumstances. Clergy become retired only when the diocesan bishop so notifies them in writing.

7.2. The portion of the compensation check entitled "Housing Allowance" is not taxable for federal income tax or for social security purposes only to the extent that it is actually spent, in the course of the calendar year, directly for housing expenses, which include but are not limited to rent, mortgage payments, repairs, construction, property taxes, utilities and insurance.

7.3. Compensation amounts will be reevaluated yearly.

7.4. 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.

8. Parish Assessments for Clergy Benefits:

<b>FY 2023-2024</b>	
Infirm Priests Fund (COA #6215)	\$250
Retired Priests Fund (COA #6310)	\$375
Priests Burial Fund (COA #6210)	\$75
<b>Total Monthly Compensation</b>	<b>\$700</b>

- 8.1. Each parish is to pay the entire sum for each priest assigned to that parish in a single monthly check. Transitional and permanent deacons are not assessed.
- 8.2. The amounts above are distinguished in the Chart of Accounts as noted.
- 8.3. Two special collections are scheduled annually to assist the parish in paying these fees. The special collection for infirm priests (COA #4625) is taken on Easter and the retired priests' collection (COA #4690) is taken on the first Sunday in November. Both collections are kept by the parish in their entirety even if they exceed the amount needed to pay these assessments. They are not considered assessable income.

9. Salary for Seminarians (located here for convenience)

<b>Seminarians (FY 2023-24)</b>	
Earned Income	\$986
<b>Total Monthly Compensation</b>	<b>\$986</b>

Given this day, 1st, July, 2019, at my Chancery in Alexandria. All things to the contrary notwithstanding.

Article 3750 • Other Benefits for Clergy

1. Reimbursements for legitimate ministerial expenses should be made in a timely fashion in a separate payment from the monthly compensation. Receipts are required to support reimbursements provided. In lieu of a receipt, a signed pro forma invoice from the one requesting reimbursement is required.
2. For parish and diocesan ministry, a priest (or another entitled person) is reimbursed at the IRS standard business mileage rate beginning January 1, 2017. 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.
3. Stipends and stole fees are earned income, but they are not included as such on the W-2. As mentioned above in Article 3300, 14.4., they are to be added into the amount reported on the line for Wages, salaries, tips, etc. on IRS Form 1040.
4. Rectory Living Expenses are paid by the parish (COA #7460)
  - 4.1. When a priest or another entitled to this benefit pays an expense from his own pocket he is reimbursed. (See 3750.1 above.)
  - 4.2. No parish may provide a check for a fixed amount to cover living expenses, e.g., monthly, quarterly, or annually. All purchases are to be supported by a record of receipts.
  - 4.3. When a parish is able, domestic staff, e.g., housekeepers, cooks, janitors, etc., may be hired at the direction of the pastor. Clergy may not take additional pay for doing this work themselves.
5. Medical Benefits

- 5.1. No priest on the diocesan insurance plan is required to pay more than \$250 per year for covered prescriptions 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 these qualified expenses. Application for reimbursement must be made to the diocesan insurance clerk. This reimbursement is not to be reported to the IRS as income.
- 5.2. 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.
- 5.3. When Part B or Part D Medicare premiums are deducted from a priest's social security benefit, that amount is reimbursed by the diocese each month. This reimbursement is not to be reported to the IRS as income. Priests who qualify for Part D may be required to utilize this cost-saving system as good stewards of diocesan resources.
- 5.4. At the death of a priest, the diocese provides his funeral expenses. 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. Absence from the Parish

- 6.1. The absence of the parish priest should interrupt the life of the parish as little as possible. Coverage must be provided for Sunday Masses. When prudent, coverage may be provided for weekly Masses as well.
- 6.2. Priests are allowed one day (24 hours) off in each week. If that day is not taken, it does not carry forward to another week and does not accumulate with other vacation time, unless approved in writing by the diocesan bishop. While the day off may be regularly scheduled for a particular week day, the priest should

prioritize his ministry above his personal leisure whenever parish or diocesan ministry requires.

- 6.3. As noted above (3150.3), when funeral services are requested on a priest's usual day off, the funeral takes precedence. It is not sufficient that another priest is available unless the priest requested is actually away on vacation. As ones called and sent to serve and not be served, clergy should graciously accept opportunities to make sacrifices.
  - 6.4. The practice of leaving the parish the day before the day off and returning the day afterward is unjust and is not acceptable because it deprives the people of their right to have reasonable access to their priests, unless approved in advance and in writing by the diocesan bishop.
  - 6.5. When the priest is to be absent from his parish, he is obliged to provide for the spiritual needs of the people. They should know how to contact him or another priest. When the absence is beyond his usual day off, the proper dean should be notified of the duration of the absence and the arrangements that have been made. The dean must be able to contact the pastor during his absence. As noted above (3150.4), all priests are encouraged to be available by cell phone.
  - 6.6. In a parish with more than one priest, only the pastor approves scheduled absences from the parish.
7. Each priest is entitled to an annual spiritual retreat and to time for continuing formation. Four days of absence from the parish are allotted for each exclusive of weekends. The priest may be compensated by the parish for the combined costs of his retreat and ongoing formation to a maximum of one-thousand dollars (\$1000) per year (COA #7080).

## 8. Vacation

- 8.1. Priests are allotted four weeks of vacation which are to be apportioned over twenty-four weekdays and three weekends of Sunday Masses. These days may be taken contiguously or in segments.

- 8.2. Absence from the parish for retreat and continuing education in excess of the allotted days is to be counted as vacation time.
- 8.3. Absence from the parish for non-parish and non-diocesan ministry is to be counted as vacation time. This includes, but is not limited to, travel for baptisms, weddings, youth ministry, or events in another parish or diocese.
- 8.4. When these limits are exceeded, the priest himself without exception shall pay the costs of providing coverage unless provided otherwise in writing by the diocesan bishop.
- 8.5. In a parish with a single priest, the pastor or administrator has to secure a priest to celebrate weekend Masses, provide for other sacramental needs, and supply a plan of action in case of emergencies or funerals. These arrangements have to be disclosed to the priest's 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.
- 8.6. In a parish in which two or more priests reside, the pastor or administrator has to approve the vacation schedule. The pastor reports his planned absences to the other priest(s) and he/they are to report theirs to him and receive his approval in advance.
- 8.7. Except in cases of genuine emergency, alternatives to these provisions require approval at least one week in advance and in writing from the diocesan bishop.



Article 3775 • Sabbaticals for Priests

1. Sabbaticals (other than health reasons) range from three (3) consecutive months to one (1) year in length and are for personal and professional study and prayer.
2. Assignments to degree programs and study are not considered sabbaticals and are thus not regulated by this article.
3. Requests for sabbaticals are made through the vicar for clergy to the diocesan bishop:
  - 3.1. 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 cost, location, and length.
  - 3.2. Application should be made by January 20 for sabbaticals for the following fiscal year which begins July 1 and ends June 30.
  - 3.3. The diocesan bishop refers all applications to the committee for continuing formation of the clergy, which will make recommendations to him by February 15.
  - 3.4. Ordinarily, the diocesan bishop will notify the applicant of his decision concerning the request for a sabbatical by February 25.
  - 3.5. Each cleric 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.
  - 3.6. Once all arrangements for coverage are finalized and approved, the diocesan bishop will inform the cleric's parish or institution of assignment of the sabbatical, the provisions for the parish in the cleric's absence, and the responsibility for partially financing the sabbatical.
4. Criteria used in the evaluation process include, but are not limited to:
  - 4.1. the applicant's years of service to the diocese,

- 4.2. the degree of usefulness of the program to the individual or to the pastoral ministry of the diocese, and
  - 4.3. the quality of the program.
5. Unless the diocesan bishop provides otherwise, financing the cost of the sabbatical program and of replacement personnel will conform to the following pattern:
    - 5.1. The cost of the sabbatical will be shared by the diocese, the parish or organization of assignment, and the applicant.
      - 5.1.1. Ordinarily, the diocese will pay one-half of the required fees and travel.
      - 5.1.2. The parish or organization of assignment will pay one-fourth of the required fees and travel expenses and will continue full compensation and benefit payments for the priest for a maximum period of one (1) year.
        - 5.1.2.1. In the case of the sabbatical occurring between assignments, the last place of assignment will pay the institutional portion of the costs. The parish or organization will also be expected to pay the cleric replacing the one on sabbatical.
        - 5.1.2.2. Should these financial responsibilities present a considerable hardship to the parish; the diocesan bishop will resolve the matter.
      - 5.1.3. The applicant will ordinarily pay the other fourth of the required fees and travel expenses. He shall also be responsible for all other costs incidental to the sabbatical.
    - 5.2. No requests for payment are to be submitted to the vicar for clergy until the diocesan bishop has granted the sabbatical.
  6. Clerics may apply for a sabbatical leave after seven (7) years of service in this diocese, and in multiples thereof. After twenty-five (25) years of service in this diocese, a cleric who has not yet had a sabbatical is strongly encouraged to take one for at least three months. Priority will be given to this request and special arrangements for financing and replacements during the sabbatical will be considered, if necessary.

7. 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.

Article 3800 • Addiction in the Clergy

1. Addiction, both chemical and behavioral, constitutes one of the most serious problems facing the Church and the world today. Addiction, like any other illness or disease, is no respecter of persons. No element of society is immune. The Church, therefore, recognizes an obligation to assist its clergy who suffer from this illness in an intelligent and compassionate manner.
2. Among priests and deacons, addiction to alcohol, drugs, pornography, and gambling are not as rare as may be believed. These addictions must not be seen as flaws in character or eccentricities. Addiction is best addressed early; otherwise more drastic steps may be needed.
3. It must be understood by all that:
  - 3.1. Addiction is a disease, attacking the whole person: body, mind, and spirit as has been well-substantiated by sound medical evidence. It is diocesan policy, therefore, to address the disease of addiction with love, care, and concern for the whole person.
  - 3.2. Addiction is a progressive disease; it becomes worse over time. If not addressed and treated, it can result in irreparable damage or even in death.
  - 3.3. Since addiction is a disease and not a moral disorder, it is diocesan policy to direct its first efforts towards a proper understanding of this condition and toward providing professional help for those afflicted and not toward inflicting remedies designed primarily for sin or penal offenses.
4. Hence, all clergy in the Diocese of Alexandria, diocesan or religious, may call on the vicar for clergy, the vicar general, or the diocesan bishop for help with an assurance of privacy and without fear of prejudice.
5. Since addicts are often incapable of recognizing their addiction or helping themselves, these procedures ought to be followed:
  - 5.1. Identification:
    - 5.1.1. Addiction exists when the individual's consumption of mood-altering chemicals, e.g., alcohol, prescription, or recreational drugs, etc. or his compulsion to engage in addictive behaviors, e.g., viewing pornography or gambling:
      - 5.1.1.1. impairs his interpersonal relationships with clergy and laity;

5.1.1.2. interferes with the performance of his assigned duties, priestly commitment, and/or ministry;

5.1.1.3. reflects discredit on his clerical office or ministry;

5.1.1.4. reduces his dependability; or

5.1.1.5. affects his physical, spiritual, or mental health.

5.1.2. The problem is not determined by either the amount or the frequency of usage but rather its effect on an individual's behavior or ability to function.

## 5.2. Intervention:

5.2.1. Addicts are seldom able to diagnose their own condition or seek treatment on their own. Intervention will often be necessary. Intervention is not confrontation. Intervention will, usually, be an exercise of constructive persuasion conducted out of true concern. The addict needs help whether he wants it or not.

5.2.1.1. Since addiction is a progressive and irreversible illness, early intervention and treatment are most important and effective.

5.2.1.2. Discretion is essential in all cases.

5.2.1.3. It is strongly recommended that no cleric undertake a personal intervention with a fellow priest or deacon without first discussing the matter with the vicar for clergy. This is required both to protect the individual's reputation and to accumulate a sound and convincing basis for the intervention.

5.2.1.4. Those that intervene must have knowledge of specific facts and events that point to the existence of a real dependency, and those facts must indicate continuing abuse.

5.2.1.5. Any accusation of moral evil is to be assiduously avoided, since it can interfere with proper treatment.

## 5.3. Treatment:

5.3.1. Treatment is determined in each case based on a series of factors including but not limited to:

5.3.1.1. duration,

5.3.1.2. degree of impairment,

5.3.1.3. physical and psychological complications,

5.3.1.4. social and vocational complications, as well as

5.3.1.5. insight and motivation.

5.3.2. Effective treatment usually takes place in two distinct phases. The first detoxifies and physically stabilizes the individual. Within this first stage, a medical diagnosis is to be obtained so that the individual can be referred to a center for treatment. The second stage helps the individual rebalance his lifestyle and values so the he can live without the addiction.

#### 5.4. Post-Therapy Considerations:

After satisfactory completion of treatment, the priest or deacon 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.

Article 3850 • Leave of Absence for Priests

1. 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 the 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 before the leave begins.
2. A priest incardinated in the Diocese of Alexandria, if placed on a legitimate leave of absence from active ministry by the diocesan bishop for reasons other than poor health, shall for three (3) months:
  - 2.1. continue to receive a salary,
  - 2.2. continue to be enrolled in and covered by the Diocesan Health Insurance Plan, and
  - 2.3. continue to have the usual monthly payments made to the diocese for the retirement, infirmity, and funeral funds.
3. If the priest returns to his previous assignment after these three months, these payments shall be made by the parish or organization to which he is assigned; if not, these payments will be made by the Diocesan Business Office.
4. After these three months, unless other arrangements are made, a secular priest on a legitimate leave of absence from active ministry may maintain his coverage by the Diocesan Health Insurance Plan by contributing his own funds. In addition, he may maintain coverage by the retirement, infirm, and funeral funds by continuing to contribute from his own funds as directed by the Diocesan Finance Office.
5. A secular priest on any leave of absence whatsoever is to keep the chancery informed as to his whereabouts.
6. No religious priest or member of a society of apostolic life on a leave of absence from active ministry is 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 the institute in question.

7. Unless another provision is specifically approved by the diocesan bishop, any priest on a leave of absence from active ministry is enjoined from the public exercise of any priestly ministry or faculty. He also is forbidden to wear clerical dress or otherwise represent himself as a cleric, and he is expected to avoid giving scandal or causing *admiratio* (or wonderment) among the faithful.



Article 3900 • 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, has lasted for more than two (2) years are ordinarily buried as lay persons, unless the diocesan bishop determines otherwise.
2. Unless or until they have been completely exonerated, funerals for clerics whose status is uncertain or who have been formally accused of sexual misconduct involving a minor, regardless of the stage of the process, are conducted as follows:
  - 2.1. The alleged victim of sexual abuse and the victim's family must continue to have the protection of confidentiality and to be accorded the presumption of credibility. At the same time, the cleric is presumed innocent unless he has been proven guilty and only to the degree that civil and/or canonical processes have been completed.
  - 2.2. 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.
  - 2.3. The diocesan bishop and other diocesan officials will ordinarily decline any role whatsoever in the funeral rites. Those who do officiate—especially those who preach—shall not eulogize or attempt to exonerate the cleric.
  - 2.4. The liturgical rites for these deceased clerics ordinarily do not take place in the Cathedral or any church in which the cleric was ever assigned except with the express permission of the diocesan bishop.
  - 2.5. Honors and solemnities such as a fourth degree Knights of Columbus honor guard or clerical-pallbearers are omitted. Contact the diocesan bishop for further clarification.
  - 2.6. If the cleric died under a canonical penalty imposed or declared after due process prohibiting the public exercise of his ministry, he is not buried as if vested for Mass. If he died under a canonical penalty imposed or declared after due process prohibiting the wearing of clerical clothing, 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.

Articles of Diocesan Policy

- 2.7. Except for reasons of poor health or retirement, priests who by their choice no longer celebrate Mass even privately or deacons who have chosen no longer to function in ministry are not buried as if vested for Mass.
- 2.8. Funeral expenses of these priests are paid in the same manner as for other incardinated priests.
- 2.9. These priests may be buried in Maryhill Cemetery.

## Section IV. Diocesan Structures

### Article 4100 • Constitution of the Diocesan Finance Council

#### 1. Name

- 1.1. The name of this body shall be the Diocesan Finance Council.

#### 2. Purpose and Scope

- 2.1. 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.

- 2.2. The diocesan finance council gives consent or consultation in various administrative decisions of a financial character—especially but not exclusively those specified in the *Code of Canon Law* (c. 493).

- 2.3. 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).

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

- 2.3.2. For validity all such acts must be documented in writing, signed by the diocesan bishop, and duly notarized (c. 474).

- 2.4. The diocesan bishop needs the consent of this council and that of the college of consultors in order to perform acts of extraordinary administration in cases besides those specifically mentioned in universal law or in the charter of a foundation. In accord with the norms of canon 1277, the United States Conference of Catholic Bishops determined at a general meeting in November of 1985 that certain acts are to be considered acts of extraordinary administration and therefore governed by the canons regulating such acts. This ruling was promulgated in a memorandum to all bishops in the United States on June 27, 1986. The acts are the following:

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

- 2.4.2. 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),
  - 2.4.3. to incur indebtedness without a corresponding increase in the assets of the Diocese that exceeds the minimum limit (c. 1295), and
  - 2.4.4. to encumber stable patrimony beyond the minimum limit (c. 1295).
- 2.5. At another general meeting, held November 13, 2002, the United States Conference of Catholic Bishops enacted additional complementary legislation for canon 1297, which received *recognitio* by the Congregation for Bishops on May 2, 2007, to make the following acts of extraordinary administration requiring the consent of the diocesan finance council and the college of consultors:
- 2.5.1. 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 the minimum limit (c.1297) or the lease is to be for three (3) years or longer and
  - 2.5.2. to lease ecclesiastical goods by any public juridical person requires the consent of the Holy See when the market value of the goods exceeds the minimum limit (c.1297).
- 2.6. 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:
- 2.6.1. appointment and removal of the finance officer (cc. 494, §§1-2; 423),
  - 2.6.2. Imposing taxes on physical and juridical persons (cc. 1263),
  - 2.6.3. implementing of more important administrative acts in light of the economic condition of the diocese (c.1277),
  - 2.6.4. 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),
  - 2.6.5. authorizing the placing of money and movable goods in a safe place and investing them (c. 1305), and

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

2.7. At the same general meeting of the United States Conference of Catholic Bishops, held November 13, 2002, the complimentary legislation for canon 1297, which received recognitio from the Congregation of Bishops on May 2, 2007, also made the following acts of extraordinary administration:

2.7.1. to lease ecclesiastical goods owned by the diocese when the market value of the goods to be leased exceeds the minimum limit (c.1297) and

2.7.2. to lease ecclesiastical goods owned by a parish when the market value of the goods to be leased exceeds the minimum limit (c.1297) or the lease is to be for one (1) year or longer.

### 3. Membership

3.1. The diocesan bishop freely appoints to the council at least three (3) Catholic clerics or lay persons skilled in financial matters and/or civil law, outstanding in character, and not related to him within the fourth degree of consanguinity or affinity (cc. 108; 109; and 492, §1, §3).

3.2. Members are to be named for a five (5) year term except when appointed to fill an unexpired term.

3.3. The diocesan bishop can appoint an executive secretary to the council.

4. The officers of the council besides the executive secretary, if there is one, shall be the chairperson, who conducts the meeting, and vice chairperson, who are elected annually in December and take office in January.

### 5. Meetings

5.1. 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.

5.2. A simple majority of the members of the council shall constitute a quorum. When a quorum is present, a majority vote of those present shall be sufficient for any action of the council.

- 5.3. The executive secretary, if there is one, shall ensure that minutes of each meeting are recorded and presented to the diocesan bishop and the members of the council; otherwise, the chairperson is to fulfill this duty.

## 6. Amendment

- 6.1. The diocesan bishop may amend this constitution on his own authority.
- 6.2. The council shall have the authority to amend this constitution only with the consent of the diocesan bishop 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.

Article 4200 • Constitution of the Presbyteral Council

1. Preamble

- 1.1. 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 local 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 Holy 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.
- 1.2. 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 religious—as well as members of 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).
- 1.3 The Presbyteral Council is the principal consultative group in the Diocese. It is like a Senate of the Diocesan Bishop assisting him in the governance of the Diocese according to the norm of law to promote as much as possible the pastoral good of the *Populi Dei portio* entrusted to him (*Christus Dominus*, n. 11 §1).

2. Name

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

3. Purpose

- 3.1. The purpose of the council shall be:
  - 3.1.1. to foster the spiritual, intellectual, and material welfare of priests so that they can fulfill their ministry faithfully and fruitfully;
  - 3.1.2. to aid the bishop in the governance of the diocese through consultation and collaboration;

- 3.1.3. to provide a forum for the full and free discussion of any and all issues of pastoral concern for the good of the diocese;
- 3.1.4. to search for and to propose ways and means of promoting effective pastoral ministry;
- 3.1.5. to represent the unity and diversity of the Priests of the diocese; and
- 3.1.6. to acknowledge and promote the dignity of the clergy, religious, and laity of the diocese as well as the role which is proper to each in the mission of the Church.

#### 4. Consultative Process

- 4.1. The council enjoys a consultative, not deliberative voice, and the diocesan bishop needs its consent only in cases expressly defined by law (c. 500, §2; 127, §2.). The major instances in which he must listen to its advice or recommendations are as follows:
  - 4.1.1. the advisability of a diocesan synod (c. 461, §1);
  - 4.1.2. the modification of parishes, e.g., their erection, alteration, division or suppression (c. 515, §2);
  - 4.1.3. 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);
  - 4.1.4. the appropriateness and effective mission of parish pastoral councils (c. 536, §1);
  - 4.1.5. the granting of permission to build a church (c. 1215, §2);
  - 4.1.6. the granting of permission for a church to be converted to secular purposes for reasons other than its poor condition (c. 1222, §2);
  - 4.1.7. the imposition of a tax for the needs of the diocese on public juridical persons subject to the bishop;
  - 4.1.8. the imposition of an extraordinary and moderate tax for very grave needs on other juridical persons and on physical persons (c. 1263); and
  - 4.1.9. any other instances defined by law.



- 4.2. The council is to establish in a stable manner a group of pastors at the proposal of the diocesan bishop from whom he is to select two whenever he wishes to remove a pastor in accord with canons 1740 and 1742 §1.

## 5. Membership

- 5.1. The membership shall consist of the Bishop of Alexandria and following members:

- 5.1.1. the Vicar General, serving *ex officio*;

- 5.1.2. One member elected by the entire electorate from each of the following categories:

- 5.1.2.1. Active priests ordained less than 10 years;

- 5.1.2.2. Active priests ordained between 10 and 20 years;

- 5.1.2.3. Active priests ordained more than 20 years; and

- 5.1.2.4. Retired priests;

- 5.1.3 Three (3) members elected by the entire electorate;

- 5.1.4 Up to five (5) priests freely appointed by the Bishop.

## 5.2. Eligibility

- 5.2.1. Only those priests actually residing in within the diocese and having the right to vote may validly be elected and therefore included on the ballot.

- 5.2.2. The following priests are eligible to vote in elections and to be elected to the Council:

- 5.2.3. incardinated priests of the Diocese of Alexandria who are in good canonical standing;

- 5.2.4. extern priests resident in the Diocese who have an officially recognized and/or designated assignment;

- 5.2.5. religious order priests resident in the Diocese who have an officially recognized and/or designated assignment.

## 5.3. Election

- 5.3.1. The Executive Committee of the Presbyteral Council shall decide disputed cases concerning eligibility to vote and to be elected.
- 5.3.2. To be elected a member must receive the majority of the votes cast. This will be accomplished in the following manner:
- 5.3.3. On the first round of voting, eligible electors shall vote for the number of seats which are to be selected. A majority of the votes cast shall be necessary for election.
- 5.3.4. On the second round, if necessary, the top two vote getters in the first round will run; each voter will vote for one and the winner of the majority will be elected. Ties will be decided in accord with the provision of Canon 119 of the 1983 Code of Canon Law.
- 5.3.5. The terms of those members elected, and those members appointed by the diocesan bishop are five (5) 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 vacancy, which begins on the day of the appointment or election.

## 6. Officers

- 6.1. Three officers (a chairman, vice-chairman, and secretary) shall be elected at the first meeting after new members begin their terms. The term for each office is one year and is renewable only once. In the event of a vacancy in an elected office, the council shall elect an officer to finish the term.
- 6.2. These officers shall meet with the diocesan bishop prior to scheduled meetings of the council to establish an agenda. Any member of the council may forward items for the agenda by contacting any officer prior to that meeting.
- 6.3. The chairman shall conduct the meetings of the council, act as chief executive officer, and execute the duties prescribed for this office by the parliamentary authority and by such standing rules as the council shall adopt. In his absence, the vice-chairman assumes these responsibilities.
- 6.4. The secretary keeps a thorough record of meetings, prepares and archives formal minutes for each meeting, disseminates documents to the council before and during meetings as required, and prepares the agenda at the direction of the diocesan bishop and the chairman. He also executes the duties

prescribed for him by the parliamentary authority and by such standing rules as the council shall adopt.

## 7. Meetings

- 7.1. The diocesan bishop shall convoke the council, preside over it, and determine the questions to be treated by it or receive proposals from its members (c. 500, §1).
- 7.2. The council meets at least quarterly on an annual schedule to be adopted by the council and approved by the diocesan bishop.
- 7.3. A simple majority of the current members of the presbyteral council constitutes a quorum.
- 7.4. 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 the *Code of Canon Law*, this constitution, and any special rules of order the council may adopt.

## 8. Committees

- 8.1. 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 chairmen, and they in turn shall select the members unless other procedures are determined by the council. Unless specified otherwise, committee members need not be members of the council or priests. The Vicar General shall sit on all ad hoc committees.
- 8.2. The committee for the ongoing formation of the clergy shall be established as a standing committee of the council. The leadership and makeup of this committee shall be chosen by the diocesan Bishop. By virtue of his appointed office, the chairman of this committee will be an ex officio member of the council and shall make regular reports to the council of its meetings and initiatives.

## 9. Amendment

Only the diocesan bishop can amend this constitution.

## 10. Cessation

- 10.1. When the diocesan see is vacant (*sede vacante*), the council ceases, and the college of consultors fulfills its functions (c. 501, §2).
- 10.2. The diocesan bishop must establish the council anew within one year of taking possession of his See. The diocesan Bishop, after consulting the metropolitan, may dissolve the council if it does not fulfill the function entrusted to it for the good of the diocese or gravely abuses its function, but he must establish it anew within a year (c. 501, §3).

#### Article 4300 • Statutes of the College of Consultors

##### 1. Membership

- 1.1. 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 (c. 502, §1).
- 1.2. As a canonical college the group is established as an aggregate of persons, in accord with canon 94, §2, for a five-year term, and the following Articles of Diocesan policy constitute its lawful statutes (c. 94, §1 and §3).
- 1.3. Members of the college are not changed or replaced during the term of the college unless by exception (See [AAS] 76 [1984], p. 747).

##### 2. Presidency and Convocation (c. 502, §2)

- 2.1. When the local see is occupied, 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.
- 2.2. 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, the Archbishop of New Orleans and the Apostolic Nuncio to the United States are also competent to convoke a meeting of the college of consultors and to 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.

### 3. Meetings and Voting

- 3.1. The college of consultors shall meet solely at the time and place determined by the one who presides over it.
- 3.2. At meetings of the college of consultors decision may be taken by voice vote unless the one presiding determines that a recorded vote is necessary.
- 3.3. When the one who presides over the college of consultors needs its consent to act, the one presiding may not vote even to break a tie (See AAS 77 [1985], p. 771).
- 3.4. For validity, when universal law requires consent, there must be a meeting of the consultors called in accord with canon 166, and consent must be obtained from an absolute majority of the members present (cc. 124 and 127, §1). However, when the consent of the college of consultors required by law involves temporal goods (e.g., alienation, extraordinary administration, etc.) belonging to a juridical person subject to the authority of the diocesan bishop valued at less than the minimum limit (c.1297), such consent may be accomplished outside of a meeting (e.g., 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 insists that a meeting for this purpose is necessary. If there is no meeting, 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 peremptory time limit expires for the vote to be valid. If enough valid votes to decide the matter are not received, a meeting is to be convoked as soon as possible.
- 3.5. When only counsel is required, such counsel may be taken individually in person, by phone, mail, or electronic communications. In certain cases, counsel—either individually or collectively—must be taken for validity (cc. 124; 127, §1, §2, 2°).
- 3.6. For validity all such acts must be documented in writing, signed by the diocesan bishop, and duly notarized (c. 474).
- 3.7. In every situation wherein consultation or consent of the college of consultors is required by law, copies of all documents and any other resources necessary for the college to exercise its functions properly are to be provided at least by

electronic means by the one who presides in a timely manner and prior to the meeting if at all possible.

#### 4. Records

- 4.1. The one who presides over the college of consultors or the member delegated to chair a meeting shall appoint another member of the college to serve as recorder for each meeting and other activities of the college outside of a meeting so that proper records of these proceedings may be retained.
- 4.2. The acts of the college of consultors are recorded in a special book kept in the diocesan archives.
- 4.3. The gravity of the matter discussed and/or actions of the college of consultors may require confidentiality, or it may be imposed by the one who presides over the college (c. 127, §3).

#### 5. Functions

- 5.1. When there is a diocesan bishop, the college of consultors is to exercise solely those various functions prescribed by law, namely:
  - 5.1.1. In accord with the norm of canon 1277, 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, in cases besides those specifically mentioned in universal law or in the charter of a foundation, whenever the episcopal conference so determines. At a general meeting in November of 1985, the United States Conference of Catholic Bishops made such a determination, which was promulgated by a memorandum to all bishops on June 27, 1986. Thus the following are to be considered acts of extraordinary administration and subject to the canons regulating such acts:
    - 5.1.1.1. To alienate (in the strict sense of to convey or transfer ownership) goods of the stable patrimony when the value exceeds the minimum limit (c. 1292, §1),
    - 5.1.1.2. 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),
    - 5.1.1.3. to incur indebtedness (without corresponding increase in the assets of the diocese) that exceeds the minimum limit (c. 1295), and

- 5.1.1.4. to encumber stable patrimony by a value that exceeds the minimum limit (c. 1295).
- 5.1.2. At another general meeting, held November 13, 2002, the United States Conference of Catholic Bishops enacted additional complementary legislation for canon 1297, which received *recognitio* by the Congregation for Bishops on May 2, 2007, to make the following acts of extraordinary administration requiring the consent of the diocesan finance council and the college of consultors:
  - 5.1.2.1. 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 the minimum limit (c.1297) or the lease is to be for three (3) years or longer and
  - 5.1.2.2. to lease ecclesiastical goods by any public juridical person requires the consent of the Holy See when the market value of the goods exceeds the minimum limit (c.1297).
- 5.1.3. 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. These include:
  - 5.1.3.1. appointment and removal of the finance officer (cc. 494, §§1-2; 423)
  - 5.1.3.2. imposing taxes on physical and juridical persons (c. 1263)
  - 5.1.3.3. determining the meaning of acts of extraordinary administration for institutes subject to the diocesan bishop, if not specified in their statutes (c. 1281, §2)
  - 5.1.3.4 authorizing the placing of money and movable goods in a safe place and investing them (c. 1305).
  - 5.1.3.5. reducing the burdens imposed in executing last wills for pious causes if such burdens cannot be fulfilled (c. 1310, §2).
- 5.1.4. At that general meeting on November 13, 2002, the United States Conference of Catholic Bishops enacted additional complementary legislation for canon 1297 which received *recognitio* from the Congregation

for Bishops on May 2, 2007, and made the following acts of extraordinary administration:

- 5.1.4.1. leasing ecclesiastical goods owned by the diocese when the market value of the goods to be leased exceeds the minimum limit (c.1297) and
- 5.1.4.2. leasing ecclesiastical goods owned by a parish when the market value of the goods to be leased exceeds the minimum limit (c.1297) or the lease is to be for 1 year or longer.
- 5.1.5. The diocesan bishop together with the college of consultors officially receives the letter of appointment of a coadjutor bishop in the presence of the chancellor (404, § 1). Ideally, the coadjutor bishop should present his letter at a public liturgy.
- 5.1.6. 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.
- 5.2. When the diocesan see is canonically impeded, that is when the diocesan bishop is unable to communicate with the diocese even by letter:
  - 5.2.1. The college of consultors is immediately to ensure that both the Apostolic Nuncio and the Archbishop of New Orleans have been informed of the situation (c. 413, §3 and the parallel in c. 422).
  - 5.2.2. The college of consultors is to elect a diocesan administrator. This action is to take place only if no other provision has been made (c. 413, §2).
  - 5.2.3. During the time the diocesan see is canonically impeded, the college of consultors shall function as if the see were vacant.
- 5.3. When the local see is vacant:
  - 5.3.1. If there is no auxiliary bishop, the college of consultors is immediately to inform the apostolic nuncio of the vacancy (cf. can. 422).
  - 5.3.2. 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).



- 5.3.3. The college of consultors must elect a diocesan administrator within eight days of the local see becoming vacant (c. 421, §1).
- 5.3.4. Should an apostolic administrator be appointed, unless the Holy See determines otherwise, the college of consultors shall function as if he were a diocesan bishop.
- 5.3.5. The college of consultors is to witness the diocesan administrator's profession of faith (c. 833, 4°).
- 5.3.6. The consent of an absolute majority of the college of consultors is needed in order for the diocesan administrator to:
  - 5.3.6.1. remove the chancellor or other notaries (c. 485);
  - 5.3.6.2. issue dimissorial letters for the secular clergy (c. 1018, §1, 2°); and
  - 5.3.6.3. 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).
- 5.3.7. 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
- 5.3.8. 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 (c. 377, §3).
- 5.3.9. The college of consultors officially receives the letter of appointment of the new diocesan bishop (c. 382, §§3-4), which ideally he presents at a public liturgy.

## 6. Amendment

Only the diocesan bishop can amend these statutes.

Article 4400 • Vicars Forane or Deans

1. Canons 553-555 of the *Code of Canon Law* specify the duties and rights of the vicars forane or deans.
2. When a dean is to be appointed, the diocesan Bishop will seek nominations from the priests of the vacant deanery. The diocesan Bishop will appoint a dean whom he has judged to be suitable for a five (5) year term. Appointment as dean does not include membership in the college of consultors, since the body of consultors is approved for a fixed term collegially. The appointed vicars forane sit as ex officio members of the Presbyteral Council and the Clergy Personnel Committee. The deans can be called together by the diocesan Bishop to meet as a consultative body. For a just reason, the diocesan Bishop may, in accordance with his prudent judgment, may freely remove the vicar forane from office.
3. Within his deanery, the dean, although not an ordinary, is an extension of the diocesan bishop and an embodiment of the principle of subsidiarity. He does not separate or isolate the diocesan bishop from his people but rather serves to resolve matters of conflict at the local level insofar as possible. When this is not possible, he brings the matter to the Vicar General and the diocesan Bishop.
4. When especially sensitive or difficult matters arise in one parish or between parishes in his deanery, the dean should notify and seek the council of the Vicar General in making the bishop aware of these. The dean should play an active part in the conflict resolution process and be notified of the final resolution of any such conflict.
5. The dean should be knowledgeable of the priests, the faithful, and the general spiritual, moral, or civil circumstances of his deanery. The diocesan bishop is free to consult with his deans, individually or collectively, so that he may be better informed. At his own discretion, a dean should approach the diocesan bishop on all matters he believes the bishop should be informed or about which he feels the need to be advised. Monthly email or oral reports will help insure clear and timely communication. Accordingly, the bishop may use the dean to communicate with the clergy and laity of his deanery and to distribute information to them.
6. Deans have the duty:
  - 6.1. to promote and coordinate common pastoral activity within the deanery. To facilitate this, each dean should arrange regular opportunities for spiritual and social renewal for the priests of his deanery.

- 6.2. to insure that the clerics of his deanery diligently perform their duties and lead lives in harmony with their state of life,
- 6.3. to insure that religious functions are celebrated in accord with liturgical law; 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; and the rectory is maintained with proper care,
- 6.4. 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,
- 6.5. to ensure pastoral care for the clergy of his deanery by providing access to spiritual help and to be particularly concerned about those clerics who find themselves in difficult circumstances or who are beset with serious problems,
- 6.6. to care for the clergy of his deanery whom he knows to be seriously ill so that they do not lack spiritual and material aids; to see that the funerals are celebrated with dignity; to make provision that when clerics are sick or dying, official records, sacramental registers, important financial records, the Blessed Sacrament, sacramental oils, sacred furnishings and vessels, or other things which belong to the Church are secured or stored properly,
- 6.7. To visit the parishes of his deanery at least twice a year,
- 6.8. To submit a written report at least once a year to the diocesan bishop detailing not only any difficulties or scandals as well as efforts to rectify them but also the good that has been accomplished in his deanery; copies of the annual report should be filed with the Chancellor in the diocesan archives,
- 6.9. to convoke meetings of the priests in his deanery when he deems it necessary and proper to provide the clergy an opportunity to discuss the pastoral situation of a deanery and to coordinate programs; the use of a deanery calendar of events is recommended,
- 6.10. to assist clergy or lay employees in obtaining Mass coverage and in providing for other pastoral services, especially during illness or unforeseen absence, and
- 6.11. to be available and accessible to the clergy and laity of his deanery,
- 6.12. to assist the diocesan bishop in any task the bishop may deem good and proper.

7. In carrying out these duties a dean might play various roles:

- 7.1. *Supporter*: A dean will support the programs and institutions of the diocesan bishop, since, as noted above, he is a personal extension. The dean should act to support him even if he personally does not agree with the diocesan bishop's wishes. A dean should also support and encourage the ministry of the clergy and laity of his deanery.
- 7.2. *Conciliator with Priests*: A dean may be a conciliator between two priests, or between a priest and a layperson. If the situation cannot be resolved at the deanery level, then the vicars for clergy may be approached in consultation with the Vicar General and finally the diocesan bishop should be consulted.
- 7.3 *Facilitator*: A dean may be called to act as a facilitator for parish councils, religious groups, or other groups or to facilitate solutions to problems within a parish or deanery.
  - 7.3.1. 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 vicars for clergy and the Vicar General may be approached.
  - 7.3.2. The Diocesan Bishop may refer matters that have been brought to his attention to a dean to investigate, resolve, and/or make recommendations.
- 7.4. *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 vicars for clergy and Vicar General as the case warrants.
  - 7.4.1. When a pastor is unable to serve his parish due to illness, it is the dean's responsibility to find a replacement and if necessary to notify the vicars for clergy and/or the vicar general.
  - 7.4.2. 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.
- 7.5. *Friend*: If a priest is having personal problems, the dean, on his own initiative, may offer his services to the individual or encourage him to solicit the aid and counsel of the vicars for clergy.

7.6. *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 days. The dean is to be told where the pastor may be reached in an emergency. To facilitate this, each dean should keep a record of personal contact information for the priests of his deanery. 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 pastor in emergencies and funerals.

7.7. *In general:* A dean is responsible for disseminating information regarding, monitoring and facilitating diocesan programs on the deanery level.

Revisions to this article were reviewed by Bishop David Talley on June 7, 2017 and were approved by the diocesan Bishop and promulgated as article 4400 of the Articles of Diocesan Policy on the 7<sup>th</sup> of June, 2017. All things to the contrary notwithstanding.

## Section V. Parish Structures

### Article 5100 • Parish Pastoral Council

#### 1. Constitution and Purpose

- 1.1. Each parish, including those that do not have a resident pastor, is to have a parish pastoral council and a parish finance council. The parish pastoral council is the principal consultative body of the parish for the pastor, and all other boards, councils, and committees shall be responsible to it.
- 1.2. The parish pastoral council exists only when it is legitimately meeting; it does not exist and cannot act independently of the pastor. It cannot meet without the pastor presiding or at least without his permission. If he is not present at a meeting, the pastoral council's recommendations must be presented to him in written form.
- 1.3. If a parish has mission churches or their equivalent in law, the pastor determines how the parish pastoral council represents them. He may establish a distinct council for each mission, appoint representatives to the council from

each mission, or establish some other method of representation which better suits the local situation.

- 1.4. The parish pastoral council shall meet at least quarterly but may meet more frequently, that is, as often as the pastor deems necessary.
- 1.5. The pastor shall convoke all the members of the council thirty-six (36) hours prior to any meeting by a means of personal communication directed to their residences or places of business. The convocation of all members is required for a valid meeting unless all members are *de facto* present.
- 1.6. The parish pastoral council may establish its own by-laws but may not act contrary to the *Articles of Diocesan Policy* or other ecclesial laws.
- 1.7. The pastor or the chair of the parish pastoral council may conduct its meetings in accord with any rule of order, but if there is a dispute, canons 113-128 and 164-179 of the *Code of Canon Law* supersede those rules of order and become applicable both in elections and in any recommendations made to the pastor.

## 2. Membership and Function

- 2.1. Members of the parish pastoral council should be Catholics who are registered members of the parish. They ought to be interested the spiritual growth of the entire parish and in overall parish-wide development.
- 2.2. Members may be elected or appointed without prejudice to gender, socioeconomic background, or ethnicity.
- 2.3. Members are typically appointed by the pastor for a term of three years. They may be reappointed for three further years. At the end of the second term, a hiatus of at least one year is required. New terms begin on the first day of the fiscal year and terms expire on the last day of the final fiscal year of appointment or election. Terms should be staggered.
- 2.4 Beyond the appointed and elected membership, the council consists of ex-officio members who do not have the right to vote. These include:
  - 2.4.1 the proper pastor,
  - 2.4.2. those assigned to church office by the diocesan bishop, e.g., parochial vicars, deacons, etc.,
  - 2.4.3. one officer of the finance council, and

2.4.4. parish employees designated in writing by the proper pastor.

- 2.5. The pastor presides at meetings of the council, but the parish pastoral council is to have at least one officer, elected by the membership, who usually chairs the meetings. He or she has to attend a diocesan training seminar within a year of being named.
- 2.6. Other officers may include a vice-chairman and a secretary. These persons have the right to attend diocesan training seminars but are not required to do so. These officers, together with the chairperson and the pastor, may constitute an executive committee.
- 2.7. The agenda for each meeting should be formulated by the pastor in consultation with the officers of his parish council. The agenda should provide ample opportunity for items which the pastor wishes to present as well as for items which the members may wish to present for consideration.
- 2.8. While formal voting is limited to appointed and elected members only, the pastor may well choose to open attendance at the meeting to other individuals or even to the entire parish.

### 3. Responsibilities

- 3.1. The members of the council advise and cooperate with the proper pastor to foster prudent pastoral action.
- 3.2. Formal recommendations of the parish pastoral council should be submitted to the pastor in writing. He in no way is obliged to accede to these recommendations, but he should not lightly disregard them or act contrary to a consensus.
- 3.3. The members of the council hold the pastor, parish employees, parish volunteers, and other members of the parish accountable for the good operation of the parish. If situations occur which raise significant questions about the competence or prudence of any of these decision-makers, the pastor should be consulted. If he fails to act, concerned parishioners may contact (in this order) the local dean, the vicar general, and finally the diocesan bishop.
- 3.4. While immediate matters of concern constitute the majority of the parish pastoral council agenda, medium and long-range items should be considered, discussed, evaluated, and updated from time to time. The council's on-going agenda includes but is not limited to:

- 3.4.1. Updating the parish's written mission statement.
- 3.4.2. Evaluating and modifying the parish's short-term, mid-range, and long-term goals, objectives, priorities, and pastoral plans regarding, for example, the liturgy, devotions and spiritual life, lay apostolate, evangelization, catechesis, faith community, social justice, vocations, fiscal policy, investments, physical campus, etc.
- 3.4.3. Reviewing at least annually the parish budget (as well as its investments and financial strategies) and making recommendations to the pastor with due regard for the Parish Finance Council which bears the primary responsibility for this activity.
- 3.4.4. Studying trends in Mass attendance, confessions, baptisms, marriages, funerals, missions, catechetical events, collections, and other statistical data which may shed light on the overall success of the parish.
- 3.4.5. Promoting meaningful dialogue, cooperation, and decision-making among the parish leadership (clergy, staff, and volunteers) and with parishioners.
- 3.4.6. Identifying concerns of parishioners.
- 3.4.7. Identifying and encouraging the use the gifts and talents of parishioners.
- 3.4.8. Assessing at least annually the function and performance of the council itself.

#### 4. Meetings

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.



## Articles of Diocesan Policy

Article 5200 • Parish Finance Council

1. Constitution and Purpose

- 1.1. Each parish including those that do not have a resident pastor is to have a parish finance council.
- 1.2. At canon law, the duly appointed pastor (or his equivalent, e.g., a parochial administrator) is the person directly entrusted with the management of the parish. He serves as the secretary of the parish corporation at civil law and presides over meetings of the parish finance council. Except where noted in law the pastor is free to act on his own accord. A pastor acts invalidly if he does not listen to his finance council when either universal or particular law requires its counsel or consent.
- 1.3. The parish finance council is concerned primarily with the budget, financial status, and business practices of the parish. It advises the pastor on major expenditures and other financial matters, and when the law demands, approves or disapproves of them. It further advises the pastor on investments, markets, and parish financial goals. It does not conduct or supervise the daily administration of the parish.
- 1.4. The parish finance council exists only when it is legitimately meeting; it does not exist and cannot act independently of the pastor. It cannot meet without the pastor presiding or at least without his permission. If he is not present at a meeting, the finance council's recommendations must be presented to him in written form.
- 1.5. If a parish has mission churches or their equivalent in law, the pastor determines how the parish finance council represents them. He may establish a distinct council for each mission, appoint representatives from each mission to the finance council, or establish some other method of representation which better suits the local situation.
- 1.6. The parish finance council shall meet at least quarterly but may meet as often as the pastor deems necessary
- 1.7. The pastor shall convoke all the members of the council thirty-six (36) hours prior to any meeting by a means of personal communication directed to their residences or places of business. The convocation of all members is required for a valid meeting unless all members are *de facto* present.

1.8. The parish finance council may establish its own by-laws but may not act contrary to these *Articles of Diocesan Policy* or other ecclesial laws.

1.9. The pastor or the chair of the parish finance council may conduct its meetings in accord with any rule of order, but if there is a dispute, canons 113-128 and 164-179 of the *Code of Canon Law* supersede those rules of order and become applicable both in elections and in any recommendations made to the pastor.

## 2. Membership and Function

### 2.1. The Parish Trustees

2.1.1. Each civil parish corporation must have two lay persons who are legally appointed by the bishop as corporate trustees.

2.1.2. A trustee must be a registered member of the parish or one of its missions.

2.1.3. Appointments begin on July 1 and end on June 30. A trustee is appointed to a two year term, which is renewable once. A full two years must elapse before another term may be served. Trustees who fill a partial term vacancy must not have served in that office for at least two years. After completing the partial term, they may serve two more consecutive terms unless the partial term lasted more than six months.

2.1.4. The pastor nominates trustees by submitting names to the bishop well in advance of the ending of terms for current trustees.

2.1.5. All trustees must attend a diocesan financial workshop within one year of appointment.

2.1.6. Both trustees are ex-officio members of the parish finance council with voting privileges.

2.2. Members of the parish finance council should be Catholics who are registered members of the parish, but this is not required. They should be well respected in the community, outstanding in personal character, and have some specialized knowledge of finance, civil law, or some other field which will assist the pastor in making financial decisions for the parish. Members may be elected or appointed without prejudice to gender, socioeconomic background, or ethnicity. Members must not be related to the pastor, the parochial vicar, or the diocesan bishop. Members must also be willing to serve on the council and to participate in diocesan training seminars or other events which may be required from time to time.

- 2.3. 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. These may constitute with their proper pastor an executive committee.
- 2.4. The diocesan bishop can grant exceptions to the norm that members of the parish finance council are not to be voting members of the parish pastoral council.
- 2.5. At the pastor's discretion, anyone, even a non-Catholic, may audit meetings of the parish finance council or the parish pastoral council and may submit recommendations to the council. Formal votes, however, are limited to members with voting privileges.
- 2.6. Members are typically appointed by the pastor for a term of five years. They may be reappointed for five further years. At the end of the second term, a hiatus of at least one year is required. New terms begin on the first day of the fiscal year and terms expire on the last day of the final fiscal year of the appointment. Terms should be staggered.
- 2.7. Beyond those appointed by the pastor, the council includes ex-officio members who do not have the right to vote. These include the proper pastor and those assigned to ecclesial office by the diocesan bishop, e.g., parochial vicars, deacons, etc.

### 3. Responsibilities

- 3.1. The agenda for each meeting should be formulated by the pastor in consultation with the executive committee or officers of his finance council. The agenda should provide ample opportunity for items which the pastor wishes to present as well as those which the members wish to present.
- 3.2. Formal recommendations of the parish finance council should be submitted to the pastor in writing for his consideration. He in no way is obliged to accede to its recommendations, but he should not lightly disregard them or act contrary to a consensus unless there is a serious reason, in his judgment, that justifies such an action.
- 3.3. The members of the finance council hold the pastor, parish employees, parish volunteers, and other members of the parish accountable for the good operation of the parish. If situations occur which raise significant questions

about the competence or prudence of any of these decision-makers, the pastor should be consulted. If after dialogue with the pastor, there is failure to follow sound business practices, each member of the parish finance council is personally responsible to make the facts known in writing within one week to the proper dean with a copy to the diocesan bishop. 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 in this process including employees.

- 3.4. The parish finance council has the special obligations and rights to
  - 3.4.1. review and analyze parish financial reports, bank statements, and other financial documents;
  - 3.4.2. review and analyze reports and plans created by the parish pastoral council prior to their implementation and to advise the pastor on financial matters associated with them;
  - 3.4.3. assist in preparing an annual budget and submit it to the pastor and parish pastoral council;
  - 3.4.4. advise the pastor on all parish investments and help clarify parish financial goals;
  - 3.4.5. advise the pastor on legal or practical matters regarding wills, bequests, contracts, taxes, banking, warrantees, etc.;
  - 3.4.6. assist in developing guidelines, job descriptions, instruments of evaluation, pay scales, and other associated documents for parish employees and volunteers;
  - 3.4.7. ensure that all of financial requirements listed in these *Articles of Diocesan Policy* are followed;
  - 3.4.8. ensure that financial disclosure statements required by Articles of Diocesan Policy are adequately published or mailed to parishioners and school families, that they are reviewed and considered by the parish pastoral council, and, if applicable, the school board or its equivalent;
  - 3.4.9. ensure that statements of deductible contributions as required by the IRS are sent to donors in January;
  - 3.4.10. advise the pastor on all major projects and expenditures;

- 3.4.11. assist the pastor when he is obliged to attend meetings of the diocesan finance council or the diocesan building review committee;
  - 3.4.12. offer counsel and assist the pastor in fund-raising activities needed in the parish so that all its members can participate fully as stewards;
  - 3.4.13. provide oversight on all construction projects; and
  - 3.4.14. cooperate with diocesan legal personnel or their representatives.
- 3.5. The parish finance council also works to assist parish organizations which operate under the civil corporate identity of the parish or which enjoy tax-exempt status by the annual group ruling in the development of their annual budgets and regularly reviews their financial reports. Nationally chartered organizations and organizations which are separately incorporated from the parish may request advice from the parish finance council with the pastor's consent.
  - 3.6. The parish finance council may always have recourse to the Diocesan Business Office or even the diocesan finance council on matters of greater importance. Typically, the pastor interacts with these entities. With his consent, representatives of the parish finance council may accompany or even represent him.
  - 3.7. The parish finance 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.

## Part II. The Sanctifying Function of the Church

### Section I. The Sacraments

#### Article 6100 • Christian Initiation

1. *The Rite of Christian Initiation of Adults* and the “National Statutes for the Catechumenate” appended to United States edition are to be followed and implemented in letter and spirit. The *Faculties for Priests and Deacons* make the implementation fully possible in every parish. Pastors are reminded that the various rituals, especially the scrutinies, are not to be lightly omitted. At least one scrutiny is required for liceity. For a serious reason, priests may dispense a catechumen from one scrutiny and in extra ordinary circumstances from two. See *Faculties for Priests and Deacons*, n. 6.3.
2. The RCIA Candidate's Information Form for those wishing to join the Church is used to assess a candidate's marital and sacramental needs. It is not optional. It should be completed as soon as an inquirer approaches. If a cause of marital nullity is to be introduced, the Tribunal is to be approached immediately. Those in invalid marriages may not participate in the Rite of Acceptance or in any other rites (e.g., scrutinies, election, etc.) until free to do so.
3. Those who are properly prepared and disposed and who approach voluntarily to request initiation are not to be unduly burdened by additional arbitrary requirements. Moreover, the rites of initiation are not restricted for use at the Easter Vigil and may be used at other times in the year for the good of the faithful.
4. Those who were baptized non-Catholic and who have not yet reached the age of reason or who lack the use of reason may be received into the Catholic Church by either of these two methods:
  - 4.1. by the "Rite of Bringing a Baptized Child to the Church," found in the *Rite of Baptism of Children* and the pastor or his delegate recording the fact of reception and the baptismal information in the appropriate register, as below,  
or
  - 4.2 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 below.

5. At baptism or reception into full communion, those who have reached the age of reason, which is presumed at seven years, **must be confirmed** and receive Holy Communion immediately after baptism or reception all within the same mass. No one seven years or older may be baptized only, that is, baptized without also being confirmed. There is no justification for delaying confirmation until high school or “when the bishop comes.” THE RITES OF INITIATION ARE NOT RESTRICTED TO USE AT THE EASTER VIGIL AND MAYBE USED AT OTHER TIMES IN THE YEAR.
6. The diocesan bishop alone will confirm all adults who were baptized as Catholics before the age of seven but were not confirmed later. Priests do not have the faculty to confirm such persons except in danger of death as provided in canon law. These adults should experience a modified form of preparation. If these same persons have also not received the sacraments of penance and/or Holy Communion, preparation to receive these sacraments should be part of the same formation. Having first received the sacrament of penance, they may receive the other two sacraments. Confirmation need not precede Holy Communion; however, it is preferable, theologically and liturgically, that confirmation be received first.
7. 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 valid marriage (including date and name of spouse) shall also be entered as usual in the baptismal register. An appropriate certificate can then be issued. The appropriate information should be entered in the other sacramental registers.
8. The Confirmation of High School Students
  - 8.1. The liturgy is to be celebrated according to the Rite of Confirmation. Ceremonies not included in the liturgical rite, such as the distribution of individual gifts or certificates after the anointing with chrism, are not permitted. They distract from the richness of the sacrament itself and unduly prolong the liturgy.
  - 8.2. The Confirmation Liturgy Planning Sheet is a required document and is distinct from the Episcopal Liturgy Planning sheet used for all other occasions.
  - 8.3. The typical time for confirmation in the Diocese of Alexandria is the spring of the candidate's third year of high school. Other students may request



confirmation at a different time for a good reason, but the bishop determines the merit of these requests.

- 8.4. Each parish is to have a written policy on preparation for confirmation which provides for both intellectual and spiritual formation but which does not infringe upon the legitimate right of the faithful to the sacraments for which they are properly disposed and prepared. The parish policy must be in accordance with these *Articles of Diocesan Policy* and the universal law of the Church.
- 8.5. Candidates should receive remote preparation in the years prior to their confirmation through Catholic schools or CCD programs, through participation in parish life at Sunday Mass, and through various kinds of service to the parish. All of these are the responsibility of the pastor to provide.
- 8.6. Candidates receive proximate preparation through special classes one to two years prior to the celebration of the sacrament. These classes provide both intellectual formation and opportunities for spiritual growth. Intellectual Formation varies widely based upon the students enrolled, teachers available, and materials employed. At the end of this proximate preparation, there should be indications of regular participation at Sunday Mass, personal prayer, and commitment to the moral teachings of the Church; but no manifestation of conscience can be demanded in these matters. The indications may be seen through service to the parish or the community, though attendance at spiritual events (e.g., retreats, days of prayer, penance services, etc.), through interest and participation in classes, and even through liturgical service to the parish as a lector, usher, or altar server. No one may be forced to conform to specific norms for the receptions of the sacraments not in the universal law of the Church. New impediments cannot be created at the local level.
- 8.7. The request for the sacrament must be freely made to the bishop through the candidate's pastor. Candidates should understand, spiritually and theologically, what they are requesting. Pastors have to ensure that candidates do not misunderstand confirmation merely as a "coming of age" or graduation ceremony. Further, candidates should not seek to "earn" confirmation, nor should preparation programs present it as such.
- 8.8. Parishes in the same area may prepare their candidates collaboratively especially through Catholic high school or joint parish religious education programs. Both those from the Catholic school confirmation program and those in the parish confirmation program should come together in some common

experiences in their own parishes or missions. Confirmation itself should always be celebrated in each candidate's own parish. Combined celebrations are permitted, especially if there had been combined preparation, after both pastors seek the approval of the diocesan bishop.

- 8.9. The candidate's baptismal name or given name—even if it is not a saint's name—may be used as the confirmation name. The candidate may also choose a new name if he or she has a devotion to a saint. Each person to be confirmed is free to choose among these alternatives.
- 8.10. Each candidate has to approach the bishop with a sponsor who is a fully initiated and practicing Catholic in good standing. The sponsor may fittingly be one of the baptismal godparents. Parents absolutely cannot be sponsors for the sacraments of baptism or confirmation. Sponsors may be of either sex.
- 8.11. Information—including models for preparation, celebration, and assistance—are available through the Diocesan Office of Religious Education.

#### Article 6200 • Baptismal Registration and Certification

1. The baptismal register is an historical document that records facts as they are known and understood at the time of the baptism. Changing historical facts is impossible. Thus, pastors are obliged to follow the law and to ensure that details are not edited to add the names of people who were not present or did not act in a particular capacity.
2. However, occasionally circumstances arise which require changes to baptismal records. In these cases the following norms are to be observed. Any deviation is forbidden.
  - 2.1. When subsequent notations or alterations are needed, nothing already written in the register may be obliterated in anyway whatsoever by anyone for any reason.
  - 2.2. Minor changes (e.g., a misspelling or an error in transcription) can be made by anyone authorized to enter data in the register. A thin line is drawn straight through the original entry and the change is made above the previous entry. Both original and corrected text should be clearly legible.

- 2.3. Major changes may require a new entry to be created and an old entry to be labeled with a cross-reference stating “Do not issue certificate from this record.”
- 2.4. Major changes require authentic supporting information that is to be kept in the sacramental register.
3. Major changes include substituting sponsors and altering the baptismal record of someone who has undergone a surgery for gender reassignment.
  - 3.1. Regarding sponsors for children still in the formative period of Christian life (i.e., infancy to age 14), the Congregation for the Sacraments provided a directive (PN 1032/84) on November 13, 1984, that parents, for serious reason, may request a substitute sponsor for the actual baptismal sponsor mentioned in canons 872 and 873. However, the following criteria must be met when making this request and when implementing this change:
    - 3.1.1. The substitute must be qualified according to canon 874, §1 and be willing to undertake the responsibilities of a sponsor in helping the baptized to lead a Christian life in harmony with baptism;
    - 3.1.2. the request is made to the diocesan bishop for sponsors who have been impeded by death, serious illness, or radical departure from the faith; and
    - 3.1.3. if the request is approved, the diocesan bishop will authorize the name of the substitute sponsors to be added to the baptismal register.
  - 3.2 The new sponsor’s name is to be added in the “Notations” or “Remarks” column with a cross-reference to the documentation placed within in the baptismal register at the same page.
  - 3.3 Regarding gender reassignment surgery, which dramatically affects a person's status in civil law, the baptismal record is not to be altered. However, the Congregation for the Doctrine of the Faith (as reported in a 2003 letter by the Most Reverend Wilton D. Gregory to the United States Conference of Catholic Bishops) has instructed that should a situation arise 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 juridical act or document should be included at that page of the baptismal registry along with, where possible, a copy of the documentation itself.

- 3.4 The notation might state “Gender reassignment: Christopher is now referred to as Christine.” See documentation in sacramental register. A certificate should not be issued with reference to the person’s original baptismal name.

#### 4. The Certificate of Baptism

- 4.1. The baptismal certificate is an official, sealed document which certifies and describes what is recorded in a specific baptismal record. It attests to the fact of the baptism of a person with a specified name.
- 4.2. Because the Church does not require investigation of any sort prior to baptism, it does not and cannot certify parentage or any other thing beyond the data provided by the parent(s) or the one with the right to request baptism and the fact that the baptism took place.
- 4.3. The certificate must include the given name, date of baptism, and recorded genealogical details necessary to identify the unique individual named. Usually, the names of the parents as provided are sufficient.
- 4.4. Every issued certificate must also include notations including but not limited to the reception of the sacrament of confirmation, the reception of holy orders, marriage(s) and death. If no notations are recorded, the words "no notations" or “nihil” must appear on the certificate. When notations of a sensitive or potentially embarrassing nature appear in the record, care ought to be taken to see that the certificate is kept as private as possible and that the one requesting the certificate be helped to understand what the notation means.
- 4.5. Certificates issued as part of an investigation—whether of freedom to marry or another canonical inquiry—must include all notations regardless of their content except in the case of adoption as specified below in n. 5.5. Otherwise, they are not valid and prove nothing. No baptismal certificate shall be issued (even one given the parents of an infant) without an indication concerning each marriage of the baptized person even if a spouse has died or, if the baptized person has not been married, the words “no notations” or its equivalent.

#### 5. Adoption

- 5.1. In accord with canon 877 §3, the following norms of The United States Conference of Catholic Bishops, having received the *recognitio* of the Holy See, became effective December 1, 2000. They supersede all things to the contrary.

- 5.2. When the baptism occurs before the adoption is finalized, the data is entered as usual with the natural parents listed as such. After the adoption is finalized, the record is amended in this way:
  - 5.2.1. Parentheses are placed around the names of the natural parents. The names of the adoptive parents are then added.
  - 5.2.2. The child's former surname is also to be parenthesized and the new surname added.
  - 5.2.3. A notation is made that the child was legally adopted.
- 5.3. For baptisms after the adoption is finalized, the following information is entered in the register:
  - 5.3.1. The Christian name of the child as designated by the adoptive parents along with the child's legal surname.
  - 5.3.2. The names of the adoptive parents.
  - 5.3.3. The date and place of birth.
  - 5.3.4. The names of the sponsors selected by the adoptive parents.
  - 5.3.5. The place and date of the baptism.
  - 5.3.6. The name of the minister performing the baptism.
  - 5.3.7. The fact of adoption but not the names of the natural parents.
- 5.4. 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. The date and location of the original baptismal record is cited and only the name of the adoptive parents and the date and place of birth are listed.
- 5.5. Baptismal certificates issued by the parish for adopted children do not contain all that is listed in the register. They differ from normal certificates in this way:
  - 5.5.1. No mention of the fact of adoption is made on the baptismal certificate.
  - 5.5.2. The child's adoptive surname is used and natural surname is omitted.
  - 5.5.3. Only the adoptive parents are listed.

- 5.5.4. The sponsors are listed only if the child was baptized after the adoption was finalized. When in doubt, they are omitted.
- 5.6. A copy of the legal adoption papers is to 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.
- 5.7. Anyone with access to parish registers has 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.

1. *The Sacred Liturgy: A Guide to Understanding the Mass in accordance with the revised General Instruction on the Roman Missal Effective April 23, 2006* is by reference diocesan policy. It is published separately but can be found on line by searching for “The Sacred Liturgy: A Guide to Understanding the Mass” and then clicking on “Liturgy booklet – Scribd.”
2. Pastors must be careful not to disturb legitimate liturgical custom without consulting the diocesan bishop. See also Article 7300, “The Parish Church.”
3. When the bishop is scheduled to celebrate a liturgy in a Church other than his Cathedral, an Episcopal Liturgy Planning Sheet must be prepared and submitted two weeks prior to the date scheduled. For confirmation a special planning sheet is also required.
4. Canon 1248, §1 of the *Code of Canon Law* stipulates that a person who assists at a Mass celebrated anywhere in a Catholic rite in the evening of the day preceding a Sunday or other holy day of obligation satisfies the obligation of participating in Mass. In the Diocese of Alexandria, "in the evening of the day preceding" is to be understood as no earlier than 4:00 P.M.
5. Adoration of the Most Blessed Sacrament
  - 5.1. The Blessed Sacrament may be exposed for the veneration of the faithful either in the monstrance or in the ciborium on the altar with the tabernacle door open.
  - 5.2. 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.
  - 5.3. The permission of the diocesan bishop is required for perpetual adoration or an adoration chapel where adoration is only periodic.
  - 5.4. It is preferable that this devotional practice take place in a chapel distinct from the body of the church so as not to interfere with daily liturgical celebrations or other activities of the parish. Where this is not possible, it may take place in the church.
  - 5.5. 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.

- 5.6. 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 end of the Triduum.
- 5.7. There should be a sufficient number of people present for Eucharistic adoration before the Blessed Sacrament is exposed. Scripture suggests: "Where two or three are gathered in my name, there I am in their midst" (Matthew 18:20). To be sure, there may never be periods when the Blessed Sacrament is exposed with no one present for adoration.
- 5.8. The local pastor is responsible for seeing that the liturgical norms and diocesan policies are followed.
- 5.9. An association is to be established in each parish in which each approved adoration chapel is located. The association's purpose shall be the promotion and organization of adoration so that it might become truly perpetual. A constitution 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.



Article 6400 • Extraordinary Ministers of Holy Communion

1. By reason of sacred ordination, the ordinary ministers of Holy Communion are the bishop, the priest, the deacon and the instituted acolyte. It is their role to administer Holy Communion to the lay Christian faithful during the celebration of Mass. In this way their ministerial offices in the Church are fully and accurately brought to light, and the sign value of the sacrament is made complete. When sacred ministers and instituted acolytes are lacking, however, lay members of Christian faithful may supply for certain liturgical offices according to the norm of law (cc. 910, §2 and 230, §3 and cf. *Redemptionis sacramentum* (RS), an instruction issued by the Congregation for Divine Worship and Discipline of the Sacraments, March 25, 2004, nn. 147 and 154).
2. An extraordinary minister of Holy Communion is a layperson who assists the clergy principally in the distribution of Holy Communion at Mass. Because these men and women assist in this intimate moment of the sacred liturgy, they must be active, faithful and confirmed Catholics of stellar reputation and intention. The pastor recommending them for this appointment ought to ensure as best he can that they are willing to maintain and even increase their devotion and prayer so that their service is a witness to others. As this ministry affirms the dignity and holiness of all the baptized, those chosen to fulfill it should manifest a wide diversity of age, race, economic condition, social status, etc.
3. The pastor, either alone or in consultation with his pastoral council, determines the number of extraordinary ministers of Holy Communion that the parish needs and chooses men and women to fill the need. The need is determined primarily by the number of people who typically present themselves for Holy Communion and the time it takes to distribute Holy Communion to them, which should not be "unduly prolonged" (See RS 158). If such a need is identified, it is the responsibility of the pastor or the administrator of an institution to see to it that provisions are made for additional extraordinary ministers of Holy Communion.
4. An extraordinary minister of Holy Communion has to be nominated by his or her pastor or administrator and approved by the diocesan bishop for this ministry.
5. The *Catechism of the Catholic Church*, quoting the Second Vatican Council II (*Lumen gentium*, n. 11), affirms that "the Eucharist is the source and summit of the Christian

life.” Hence, careful and reverent attention is required whenever it is celebrated, distributed, or exposed for adoration. Pastors should exercise special care in choosing those proposed to serve as extraordinary ministers of Holy Communion. Such a person should regard the Eucharist as the center of his faith, model Catholic values, and embody the Christian life of service.

6. The usual term of service for an extraordinary minister of Holy Communion is three years, which can be renewed on request by the pastor.
7. The designation for service as an extraordinary minister of Holy Communion is valid only within the parish or institution of appointment and for the time specified.
8. Before an extraordinary minister is appointed or reappointed, the person is to attend a training session or workshop provided by the parish or by the diocesan office. The diocesan bishop may dispense this requirement in exceptional cases.
9. After appointment by the diocesan bishop, the extraordinary ministers should be formally commissioned by their pastor, or his equivalent, 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*, nn. 1871-1896. Care should be taken, though, that the rite does not "resemble sacred ordination in any way" (RS 155).
10. The pastor, or his equivalent, is to provide for the enrichment and spiritual growth of those who serve as extraordinary ministers of Holy Communion. He may accomplish this by any combination of spiritual direction, days of enrichment, seminars, retreats, or other events.
11. On particular occasions, when there is need for additional extraordinary ministers of Holy Communion, the celebrant may commission suitable persons for that particular occasion. This kind of appointment should be the exception.
12. The attire of an extraordinary minister of Holy Communion should be in conformity with his or state in life. Care should be taken to avoid confusing extraordinary ministers of Holy Communion with deacons because of their attire.
13. Extraordinary Ministers of Holy Communion may distribute Holy Communion only when there are not sufficient ordinary ministers present at the celebration.

14. It is preferable that enough hosts should be consecrated at each Mass that all present may receive. Consecrated hosts for the sick and homebound and for private devotion are secured in the tabernacle. Consecrated wine must be consumed at Mass and may never be reserved in the tabernacle.
15. An extraordinary minister should 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 and not form part of any procession.
16. At Mass, the priest receives Holy Communion before it is distributed to the other ministers. The deacon receives next, even before concelebrants, then the extraordinary ministers, and finally the rest of the assembly.
17. Only priests self-communicate. All others, including deacons and extraordinary ministers of Holy Communion, receive from another minister.
18. Reverence requires that Holy Communion never be distributed hastily or with improvisation. However, friendly eye contact, posture, and tone of voice should enhance the moment of reception. The ministers—both ordinary and extraordinary—say the formula and offer Holy Communion according to the wish of the communicant: either in the hand or the tongue. Similarly, when Holy Communion is offered from the cup, the communicant decides whether to receive. Ministers of Holy Communion may never modify the formula or add the name of the communicant.
19. If an extraordinary minister of Holy Communion notices a communicant acting improperly (e.g., practicing self-intinction or behaving irreverently with the Holy Eucharist), he or she should tell the celebrant at a convenient time and allow him to address the situation. However, he or she should attempt to stop anyone who merely walks away with a consecrated host in hand.
20. Extraordinary ministers of Holy Communion should not serve in any other role at a liturgy in which they distribute Holy Communion, e.g. bride or groom, lector, usher, cantor, etc.

21. At the discretion of the pastor, extraordinary ministers of Holy Communion may be asked to visit the sick or homebound in addition to or instead of distributing Holy Communion at Mass.
  - 21.1. When they bring Communion to the sick and homebound, the proper rite is to be used. They should offer the Eucharist as Viaticum to those who are dying. Pastors should see that extraordinary ministers have access to these texts and are properly instructed on the rites and the circumstances they might encounter.
  - 21.2. In bringing Holy Communion to the sick and shut-ins within the parish or institution for which they were approved, the extraordinary minister must have at least the 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.
  - 21.3. When a visit to the sick is to be done immediately following Mass, at least some public mention is encouraged after Communion at that Mass.
  - 21.4. Whatever is done by way of obtaining and bringing Holy Communion to the sick is to be carried out with dignity, decorum, and true respect for the Eucharistic presence. It is not appropriate simply to bring a pyx while coming forward to receive Holy Communion.
  - 21.5. 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.
  - 21.6. At the sickbed, as at Mass, an extraordinary minister only functions in the absence of an ordinary minister. If a priest, deacon, or installed acolyte is present, he distributes communion to the sick person.
22. In the absence of an ordained minister and with the expressed permission of the pastor, an extraordinary minister of Holy Communion 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 with the exception that laypersons are not permitted to give the blessing in any form as part of the ritual.

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

#### Article 6500 • Other Ministers in the Sanctuary

1. 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 or cantor, or other functions according to the norm of law (canon 230, §2). 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 or boys and girls. Although the ministry of instituted lector and acolyte are reserved to lay men, the liturgical functions of these ministers may be carried out by others, regardless of gender. This clarification came in the form of a circular letter (dated March 15, 1994) to the presidents of the episcopal conferences from the Congregation for Divine Worship and the Discipline of the Sacraments, which disclosed that the council rendered its authentic interpretation on June 30, 1992, and Pope John Paul II confirmed it on July 11 of that same year.
2. Since no practical distinction should be made between the functions carried out in the sanctuary by males and those carried out by females, the term "altar boys" should be replaced by "altar servers."
3. Altar 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. Adults may also be altar servers. Generally, lectors and extraordinary ministers of the Eucharist are to be confirmed.
4. Members of the same family may be used in various roles during the celebration of the same Mass.
5. Ministers in the sanctuary should receive adequate instruction and formation before beginning service in their respective roles. This formation should include but not be limited to:

- 5.1. the names and uses of sacred objects,
  - 5.2. the order of Mass and the meaning and symbolism of its parts
  - 5.3. the order and purpose of other kinds of liturgies typical to the parish which may require servers, e.g. Benediction of the Most Blessed Sacrament, the Liturgy of the Hours, The Way of the Cross, etc.;
  - 5.4. the proper disposition or reverence while sitting, kneeling, walking, carrying objects, etc., and
  - 5.5. the dress requirements and rules or policies of the particular parish.
6. If at all possible, at least one altar server should assist the priest at every Mass. On Sundays or solemnities, two or more servers are appropriate.
  7. Altar servers should normally be vested during liturgies. While certain liturgies require different vestments, the alb and cincture or other lawfully approved attire are preferred for Sunday Mass. (See the *General Instruction on the Roman Missal*, n. 119.)
  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 they wash the hands of the priest. As necessary, they assist the deacon who prepares the gifts.
  9. Servers respond to the prayers and dialogues of the priest along with the congregation. They also join in singing the hymns and other liturgical chants
  10. Altar servers ought to be seated in the sanctuary or in some place from which they can easily assist the celebrant. They ought to be able, insofar as their duties allow, to follow the text of the readings and join in congregational singing.
  11. Altar servers may not distribute Holy Communion even if they are extraordinary ministers or perform any other liturgical function except in the case of grave pastoral necessity.
  12. Pastors are encouraged to use the "Order for the Blessing of Altar Servers, Sacristans, Musicians, and Ushers" (*Book of Blessings*, nn. 1847-1870) before servers begin to function in their ministry.

Articles of Diocesan Policy

Article 6600 • Preparation for Marriage

The policy on Preparation for Marriage will be published separately but is by reference incorporated into the Articles of Diocesan Policy and is to be read, understood, interpreted, and applied in the same way.

Article 6700 • Notifications of Marriage and Death

1. As part of his pastoral ministry, the bishop may wish to send a note of congratulations or condolence to the faithful experiencing a life-changing moment.
2. After a marriage recognized by the Church, pastors are asked to submit a Notification of Matrimony form to the chancery.
3. When a parish receives the news of death, pastors are asked to submit a Notification of Death form to the chancery.
4. Forms can be mailed to Office of the Bishop, P.O. Box 7417, Alexandria, LA 71306-0417 or faxed to 318-767-1230, or the information necessary may be emailed to [notify@diocesealex.org](mailto:notify@diocesealex.org).



Article 6800 • 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 the Cathedral or on another day, date and time or location as determined by the diocesan bishop.
2. Ordinations to the diaconate usually take place in the Cathedral on a date and time determined by the diocesan bishop.

## Section II. Sacred Times and Places

### Article 7100 • Remembrance of the Dead in Funeral Rites

1. The *Order of Christian Funerals (OCF)* allows an individual to speak "in remembrance of the deceased" during the vigil (*OCF*, n. 80). These comments are meant to be brief and of a personal nature. Any requests to speak should be directed to the priest while other arrangements are being made. Proactive pastoral prudence suggests that the priest might also invite comments during the vigil. Clearly, no relative or friend may preach unless he is a member of the Catholic clergy.
2. Preaching is a ministry of the Word which entails expounding faithfully on the mystery of Christ as proposed by the magisterium of the Church. It takes on various forms. Preeminent among them is the homily given at Mass, which is reserved exclusively to Catholic clergy. See canons 760 and 767-768 as well as number 134 of the *Directory for Ecumenism (DCE)*, in which Pope John Paul II reaffirmed these norms. A eulogy is not an appropriate substitute (*OCF*, n. 141). However, brief illustrations from the life of the deceased may be consoling for the family.
3. Despite the custom of eulogizing the dead, which is common in Louisiana, clergy and others should not "canonize" the deceased or speak of them as if they were already in heaven, since such sentiments tend to contradict the prayers offered during the ritual. The "celebration of the Christian funeral brings hope and consolation to the living. While proclaiming the Gospel of Jesus Christ and witnessing to Christian hope in the resurrection, the funeral rites also recall to all who take part in them God's mercy and judgment and meet the human need to turn always to God in times of crisis" (*OCF*, n. 7).
4. Generally, only Catholics may serve as lectors at the funeral Mass. On exceptional occasions and for a just cause, the diocesan bishop alone may permit a member of another church to read the scriptures during Mass (*DCE*, n. 133).
5. It is for the pastors or rectors of churches to see to it that these prescriptions are explained to the family of the deceased and are conscientiously observed.
6. Priests conducting the funerals outside their own parishes ought to follow the particular policies established by the proper pastor of that place.

Article 7200 • Cremation

1. A funeral in the presence of the cremated remains of the deceased is permitted. The Appendix, "Cremation" from the *Order of Christian Funerals*, is to be followed in all of its elements.
2. The faithful are to be instructed and exhorted that the cremated remains are to be interred either in the cemetery, in a vault, in a mausoleum, in a columbarium, or at sea. The remains must never be separated, distributed, or incorporated into any other substance including other cremated remains. They must never be enshrined or stored in a home or residence (*OCF*, n. 417). Clergy may choose to remind families that cremated remains are not protected by law as corpses are and that failure to properly bury the cremains could result in mistreatment.
3. When the exhortation of the Church is not heeded in regard to the disposition of the cremated remains, the funeral with or without the cremains present is to be celebrated but the "Rite for Accompanying Ashes" is not used. Instead the alternate form of dismissal is to be used (*OCF*, n. 437).
4. A funeral liturgy is to be denied only if it is certain—not merely presumed or suspected—that cremation or the means of disposition have been chosen for reasons that are contrary to Christian teaching about the resurrection (c. 1176, § 3).

Article 7300 • The Parish Church

1. Pastors should not restore, renovate, replace, or significantly change the location of the altars, ambo, presidential chair, tabernacle, choir area, or other sacred furnishings without consulting the diocesan bishop.
2. In accord with canon 964, §2, the following norm of the United States Conference of Catholic Bishops, having received the *recognitio* of the Holy See, became effective December 1, 2000. It supersedes all things to the contrary
  - 2.1. 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, July 7, 1998 (AAS 90 [1998], p. 711).
  - 2.2. This authentic interpretation allows 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 confessional for face-to-face confession.

Article 7400 • Special Additional Procedures for Renovating Places of Worship

1. In addition to the general requirements of Diocesan Policy Article 8800, the following elements are required to obtain the consent of the diocesan bishop 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. At his discretion, the diocesan bishop may consult the Diocesan Liturgical Commission or appoint an *ad hoc* diocesan committee for the project to:
  - 3.1. provide 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, and
  - 3.2. review, evaluate, and comment on the plans and recommend to the diocesan bishop whether the project should proceed at each phase when the diocesan building review committee is to give its opinion in accord with Article 8800.

## Part III. Temporal Goods

### Article 8100 • Fiscal Management of Parishes and Missions

1. The fiscal year (FY) for all entities in the Diocese of Alexandria, including parishes and parish organizations, is July 1 through June 30.
2. The duly appointed pastor is the only canonical agent who can act or authorize another to act in the name of the parish. The term "pastor" here refers to the one directly entrusted by the diocesan bishop 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.
3. 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 are trustees duly appointed as described above in Article 5200. 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. Any contract or other civilly binding document is to be submitted for review to the Diocesan Business Office in sufficient time for careful review before it can be signed. 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. The chancery is also to retain a copy.
4. The civil corporation of the Diocese of Alexandria, its subsidiaries, and all parish civil corporations and their subsidiaries, as non-profit religious organizations, are already recognized by the Internal Revenue Service as tax-exempt organizations under section 501(c)(3) and receive this exemption annually through Group Ruling #0928 of the United States Conference of Catholic Bishops.
  - 4.1. Affiliation with the United States Conference of Catholic Bishops (USCCB) is verified by a listing in the *Official Catholic Directory (OCD)* which is published by Kennedy & Sons and filed annually with the Internal Revenue Service.
  - 4.2. 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 sales taxes collected at the state, civil parish, or other local jurisdictional levels. Church parishes are never to purchase goods of any kind without paying the full sales tax due.
- 4.3. 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.
5. Parish collections, including the Infirm Priest Collection and Retired Priest Collection, are to be retained for use in and by the parish.
    - 5.1. Special Collections, as prescribed annually, are to be taken up in all churches for diocesan, national, or universal projects and may be authorized for other Catholic entities. Pastors are authorized to take up special collections only for the needs of the building, school, and charitable works of their own parishes. They are forbidden to take up collections in church for any other causes, albeit worthy, including collections for other non-profit organizations or needy individuals or families without the express written consent of the diocesan bishop.
    - 5.2. Funds from all other collections, including appeals made by visiting clergy on behalf of Catholic entities, are to be transmitted directly by a parish check as a lump sum to the Diocesan Business Office as they are received in accord with the norm of Canon 1266. The name and mailing address of the Catholic entity, as well as the visiting priest's name, if applicable, should be included in that correspondence.
  6. The maximum amount a pastor may spend without further authorization is \$25,000 or 5% of his parish's taxable income for the previous fiscal year, whichever is higher.
    - 6.1. The written consent of the diocesan bishop is required for a pastor to accept a donation or bequest of any property or tangible item valued above the maximum limit of his spending authority.
    - 6.2. To accept real estate or perform any other act requiring a corporate resolution, the Diocesan Business Office must be contacted beforehand for validity.
    - 6.3. An act of extraordinary administration (c. 1281) occurs when the pastor conducts a single business transaction exceeding the maximum limit of his authority.
    - 6.4. An act of alienation (c. 1292 §1) occurs when real property or the goods of the parish, school or any of its subsidiaries are sold, mortgaged, leased, donated,

- or otherwise encumbered. Alienation includes large expenditures for the purchase of property, construction, and improvements including those funded by persons or entities other than the parish.
- 6.5. For validity, acts of extraordinary administration or alienation require the written consent of the parish pastoral council, the parish finance council, and the diocesan bishop.
  - 6.6. A request for the consent of the diocesan bishop is to 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 and may require the consultation of the diocesan finance council, the diocesan building review committee, and/or the college of consultors.
  - 6.7. 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 one (1) year or longer.
  - 6.8. Pastors are held personally liable for canonically or civilly invalid acts of administration.
7. To promote the dignity of marriage, no Church property (e.g., the church building itself, rooms, halls, gyms, etc.) may be used or rented to celebrate weddings (e.g., the exchange of consent, parties, showers, dinners, dances, receptions, anniversaries, etc.) not conforming to the laws of the Catholic Church. Marriages conforming to the laws of the Church include those involving at least one Catholic party and celebrated in canonical form or with a dispensation therefrom. Also included are those in which—regardless of the official—neither party was or is Catholic, and neither has a previous living spouse. It is for the pastor to make this determination.
  8. Parish/Mission assessments are based on the assessable income for the prior twelve (12) months as reported on the parish/mission financial reports for the quarters ending June 30, September 30, and December 30 of the previous calendar year and March 31 of the current calendar year.
    - 8.1. The total of "Income—Assessable" on the Quarterly Report is the amount taxed. The Chart of Accounts (COA) is available through the Diocesan Business Office and on the diocesan website at Parish Chart of Accounts or at Quick Reference. By reference both are incorporated into these *Articles of Diocesan Policy*.



8.2. The total assessment is calculated, divided by 12, and billed monthly. The initial billing is for July of each fiscal year. The Assessment Rates are:

Annual Assessable Income	Assessment Rate
Less than \$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%

### 8.3. Reductions in Assessment

8.3.1. Parishes who maintain and support parish schools receive a reduction of 2%.

8.3.2. 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.

8.3.3. A reduction in assessments for a fund-raising project or other building fund collections may be sought under the following conditions:

8.3.3.1. The request for the assessment reduction must be in writing to the diocesan bishop and have received approval prior to the commencement of fund-raising for the project.

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

8.3.3.3. 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.

8.3.3.4. The parish assessment on income from previous periods is not reduced, since the reduction is not retroactive.

8.3.3.5. If total is \$50,000 or less, the first \$25,000 is not assessed, the second \$25,000 is assessed at 3%. 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%. 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 that above \$500,000 is assessed at 5%.

8.3.4. All reductions require the written consent of the diocesan bishop.

## 9. Construction

9.1. For construction projects, detailed procedures are described in Article 8800. Additional procedures are required when construction affects places of worship. See Article 7400.

9.2. The maximum limit of a pastor's spending authority refers to the total cost of a single project. It is dishonest and thus not acceptable to circumvent this maximum by arbitrarily dividing a project into a series of phases or smaller projects each totaling below the maximum. This maximum limit applies to the total of all expenses paid from all entities under the auspices of the parish, including missions, schools, cemeteries, and other subsidiaries or funds.

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

## 10. Financial Reporting

10.1. Quarterly financial reports are required for each location regardless of income level. Parish and missions file separate reports.

10.1.1. They are to be filed for the quarters ending September 30, December 31, March 31, and June 30 of each fiscal year.

- 10.1.2. 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 may be obtained from the same office.
- 10.1.3. With the fourth quarter report, a more complete accounting of all parish and school funds, known as the summary page, is due. Also due is a letter detailing the meeting dates for the parish pastoral council and parish finance council, names of the members of both councils, and the dates of the confirming review of the quarterly financial reports for the fiscal year just ended. The letter, which is to be signed by the pastor, the parish trustees, the chair of the parish pastoral council, and the chair of the parish finance council, is also to include the following statement:

By signing this letter, we hereby confirm that we have been given the opportunity to review the Parish's Quarterly Financial Reports as prepared and submitted to the Diocese of Alexandria through the year, as well as any other financial records of the parish as we have requested. We further confirm that we have attended (or will attend prior to November 1 of this year) the Parish Pastor / Trustee / Council Chair Training Workshop provided by the Diocese of Alexandria as required by Diocesan Policy.

## 11. Financial Reviews

- 11.1. The diocesan bishop occasionally may require an outside review.
- 11.2. The Diocesan Business Office will bear the costs of these reviews.
- 11.3. 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 transfer, parish insolvency, failure to pay outstanding accounts, and other financial difficulties, this notice may be shortened or waived.
- 11.4. Parishes are to have the following financial documentation available for review by the outside auditors:
  - 11.4.1. General ledgers, cash receipts, and cash disbursements forms for at least the last three fiscal years.
  - 11.4.2. A list of all bank accounts, including those closed in the past three years, (by name, financial institution, and account number) including checking, savings, certificates of deposit, or any other funds. This listing should also

Articles of Diocesan Policy

include accounts of parish organizations such as the altar society, St. Vincent de Paul, etc.

- 11.4.3. Bank statements for all cash accounts with canceled checks and deposit slips for at least the past three years.
- 11.4.4. Copies of quarterly financial reports for at least the past three years.
- 11.4.5. Copies of W-2 earning statements and Form 941 Quarterly Payroll Reports for at least the past three years.
- 11.4.6. Copies of Charitable Gaming Reports filed with the Louisiana State Office of Charitable Gaming for at least the past three years, if applicable.
- 11.4.7. A list of any notes or loans outstanding, including loan number, name of financial institution, amount of loan, and monthly payment due.
- 11.4.8. A list of outstanding bills or accounts payable, including outstanding amounts owed to the diocese such as assessments, consolidated insurance, priest retirement, or group health premiums.
- 11.4.9. Credit card billing statements for the last three years.

Article 8200 • Financial Standards of Performance

1. All administrators, in accord with canon 1284, are bound to fulfill their office with the humble diligence of the scriptural good steward. Practically, the parish administrator
  - 1.1. observes the prescriptions of both canon law and civil law or those imposed by the founder, donor, or legitimate authority and is especially vigilant that the Church not be harmed through the non-observance of any pertinent laws,
  - 1.2. ensures that the ownership of ecclesiastical goods is safeguarded through civilly valid and legal methods,
  - 1.3. arranges and safeguards the documents and deeds of the church or the institution and forwards authentic copies of them to the diocesan archives,
  - 1.4. collects the revenues and income when they are legally due, safeguards them once collected, and applies them according to the intention of the donor or according to established legal norms,
  - 1.5. keeps accurate records of receipts and expenditures and provides reports on their administration at the end of each year,
  - 1.6. renders accounts to the faithful concerning their contributions to the Church, in accord with canon 1287, §2, the *Articles of Diocesan Policy*, and IRS regulations, in January,
  - 1.7. assists and collaborates with the parish finance council in the development of the annual parish budget,
  - 1.8. invests, with the consent of the diocesan bishop, excess funds after expenses that can be profitably used for the goals of the institution,
  - 1.9. pays the interest on any loan or mortgage when it is due and takes care that the capital debt itself is repaid on schedule,
  - 1.10. ensures that none of the goods entrusted to his care is in any way lost or damaged and, with the advice of the Diocesan Business Office, takes out insurance policies as necessary,
  - 1.11. obtains written permission from the diocesan bishop to initiate or contest any civil lawsuit or to represent the parish in any legal action (can. 1288), and
  - 1.12. does not relinquish his responsibilities of his own initiative even if he is not bound to administration by ecclesiastical office and understands that, if the

Church is harmed by an arbitrary abandonment of duty, he is bound to restitution (c. 1289).

2. 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.
3. Pastors, or their equivalent in law, are accountable along with the parish finance council to the diocesan bishop.
4. The diocesan bishop, together with the diocesan finance council, presbyteral council, and college of consultors, is accountable to the Holy See.

Article 8300 • Fund-Raising and Other Contributions

1. In accord with canon 1262 and complementary legislation approved by the United States Conference of Catholic Bishops with *recognitio* from the Holy See, all parishes, schools, other institutions, religious orders, and professional as well as religious fund-raisers are to abide by this law for the United States.
2. All provisions in this article apply not only for a given appeal for a specific project, but are also normative for the good stewardship of all gifts given to ecclesial parishes and institutions. Therefore, these fund-raising policies also apply to the regular offertory and special collections.
3. It is forbidden to take up collections at Mass for any cause, except those authorized elsewhere in these Articles of Diocesan Policy, without consent of the diocesan bishop. See Article 8100.
4. Special care is to be taken to see that professional fund-raisers, church parishes, and schools maintain ethical business relationships with suppliers of goods and services.
  - 4.1. Fund-raising appeals are to be truthful and forthright as well as theologically sound; should strive to motivate the faithful to a greater love of God and neighbor.
  - 4.2. Fund-raising efforts are to be for defined needs.
  - 4.3. The relationship of trust between donor and fund-raiser requires that funds collected are used for their intended purposes and that funds collected are not absorbed by excessive fund-raising costs.
  - 4.4. 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.
  - 4.5. Agreements are not to be made that directly or indirectly base payment to a professional fund-raiser on a percentage basis.
5. In the case of construction or renovation, fund-raising campaigns must be approved by the diocesan bishop. See Article 8800.
  - 5.1. The request must be made in writing and approved before any fund-raising begins and before any professional fund-raiser is employed.

- 5.2. 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.
  - 5.3. 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.
  - 5.4. Evidence of consultation with and the concurrence of the parish pastoral and finance councils shall be included.
  - 5.5. 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 to be sent to the donors with a copy to the diocesan bishop in a timely manner.
6. Pastors and their councils shall keep abreast of government regulations pertaining to the financial welfare of parishes. See <http://www.irs.gov/pub/irs-pdf/p1828.pdf>.

## 7. Reporting

- 7.1. Pastors are to prepare an annual report or summary of the assets, income, and expenses of the parish. This report is to be publicized in a timely manner at the end of each fiscal year, usually by July 31. In parishes with schools, a similar report is to be prepared and publicized. This report about the school is to include a calculation of the actual cost of education per child. Pastors should consult the Catholic Schools Office in making that calculation.
- 7.2. 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. Thus, compliance with civil law is also a matter of diocesan policy in accord with canon 22.
- 7.3. During and after a fund-raising campaign, reports of all fund-raising projects are to be published and prepared. These reports are to meet the particular concerns in scope and design of those to whom they are due. These include:
  - 7.3.1. the parishioners and other donors to the church (at least annually),
  - 7.3.2. the parish pastoral council, the parish finance council, and if applicable, the school advisory council (at least quarterly),
  - 7.3.3. the beneficiaries of the funds raised (at least annually), and



7.3.4. the Diocesan Business Office (at least quarterly in accord with norms established at the outset of the project).

Article 8400 • Sale and Use of Alcoholic Beverages

1. The following policies are to be followed at all events—public and private—on parish grounds, whether the parish formally sponsors them or not. Any person or group holding private events on parish property must agree in writing to these requirements.
2. The pastor has to specifically and directly approve the presence of alcohol at every individual event. No blanket permissions or statements suffice.
3. The parish should have a formal, written policy that meets the specific needs of that parish and accords with this article before any alcohol may be served.
4. All civil legal requirements (e.g., licenses, fees etc.) must be met in the local jurisdiction of the parish or school before any alcohol may be sold.
5. Uniformed law enforcement personnel have to be present at every event at which alcohol is served.
6. Events at which alcohol is served without food also being served during the entire time of the event are strictly prohibited.
7. Alcohol is to be strictly controlled and distributed by a responsible adult of legal drinking age. This includes alcohol which has been brought in privately. Nothing resembling an "open bar" is allowable.
8. Each drink is to be served to one adult—one drink at a time. The server must check the ID of anyone who appears to be below drinking age.
9. Every reasonable precaution should be taken to ensure that all alcoholic beverages brought into the event are under the direct supervision of those responsible for the event. There is to be no "BYOB" (Bring Your Own Bottle) unless all the requirements of numbers 7 and 8 are fulfilled.
10. If any minors are present, adults of drinking age who are directly responsible for chaperoning minors may not drink at all.

Article 8500 • Charitable Gaming

1. Charitable gaming has a long history in central Louisiana and has been greatly beneficial to the Church. Still, pastors ought to exercise prudence and pastoral concern when considering the extent and value of gaming for a particular parish. They ought to be solicitous to provide for the needs of their parishes without resorting to unpredictable fund-raising like gaming. Ideally, a strong sense of stewardship and financial development would render gaming merely an additional but not necessary source of revenue.
2. Further, pastors ought to pay special attention to the dangers of gaming, which may be more serious in some parishes than others. The presence of casinos, of gambling addiction, or of some other pastoral concern may require more subtle or delicate decisions.
3. All civil laws regarding charitable gaming have to be strictly followed, and all civil licensing and reporting procedures have to be carefully obeyed. Failure to do so may result in large fines, which are the responsibility of the pastor in accord with Article 8100. As such, the pastor must carefully oversee any organization that sponsors charitable gaming events.
4. Any gaming activities not specifically authorized by the charitable gaming law and licensed to the organization are prohibited. This prohibition also applies during fairs and festivals unless specifically approved by the Louisiana Office of Charitable Gaming.
5. 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., either in name or in fact, may not be used.
6. No contract can be entered into with any person or organization to operate charitable gambling in the name of a parish, school, or parish organization, and no one is to be paid for conducting bingo, raffles, or other gaming activities.

Article 8600 • 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 belong to the proper parish.
  - 2.1. All accounts shall bear the name and the federal employer identification number (EIN) of the parish. Accounts that do not bear the federal employer identification number but enjoy the privilege of the tax-exempt status offered the Catholic Church in the annual IRS group ruling through the parish belong to the proper parish itself and are subject to the authority of the pastor as defined herein.
  - 2.2. The pastor's name shall appear on each account as one of the authorized signatures, and he shall be capable of signing all instruments alone. He may authorize single or require dual signatures on banking instruments when he, at his sole discretion, appoints others to manage accounts in his name.
  - 2.3. 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.
  - 2.4. All universal and diocesan norms governing the temporal goods of the Church are applicable to parish organization.
  - 2.5. 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 shall be collected or expended only for the purposes outlined in the constitution and according to the nature and purpose of the organization.
5. Neither the membership nor a pastor alone has a right to expend these funds for other purposes.

6. Individually designated gifts for a specific purpose may only be used for a different purpose with the consent of the donor.
7. 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 written consent of the proper pastor.
8. 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.

#### Article 8700 • Consolidated Self-Insurance Program

1. The Diocese of Alexandria is self-insured for all coverage other than group hospitalization. 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 parish pays \$500 and the diocese pays up to \$24,500 in addition to meet the stop loss limit per location but will not pay out more than \$225,000 in a given insurance year for non-named storms.
3. A separate deductible 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.
5. The insurance program is operated on a fiscal year that runs from July 1 through June 30. Premium billing to the parishes, schools, and institutions is done on an annual basis with the June 30 statement of each year. The amount of the total billing to the parishes, schools, and institutions is contingent on these factors:
  - 5.1. the Loss Fund to be covered,
  - 5.2. the Named Storm Deductible Fund,

- 5.3. the premiums from the insurance companies for the excess coverage,
  - 5.4. the administrative fee for Helouin Insurance Agency, and
  - 5.5. the Safe Environment Program expenses.
6. Any surplus funds generated by the self-insurance program are transferred to the Priests' Retirement Plan.
  7. For further information on this program, contact the Diocesan Business Office.
8. Special Events Policy
    - 8.1. Certain insurance requirements must be fulfilled when church buildings or properties are rented or used by persons or organizations that are not church or school sponsored. No such additional insurance is required from parish organizations. It is for the pastor to determine whether any event is "sponsored" which thereby makes it eligible for inclusion under regular institution insurance coverage.
    - 8.2. Consistent with the concept of the parish as community, the definition of "church or school sponsored" includes activities that are of a personal or family nature, e.g., wedding receptions, anniversary celebrations, birthday parties, family reunions, or similar functions.
    - 8.3. Specifically excluded from this definition are situations where a parishioner may pay a fee or utilize church facilities as a member of and/or for an organization such as a civic club or sorority, etc. Any business use of church facilities by parishioners is also excluded from this definition. In these cases, proof of liability insurance is to be provided by the user. The parish and diocese of Alexandria has to be named as additional co-insureds.
    - 8.4. If church property is rented or provided for non-church or 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.

1. Construction and major renovation is time consuming, complex and expensive. It requires a broad range of expertise from civil law to finance, to bid-selection and architecture, plus much more. For these reasons, the specific written consent of the diocesan bishop is required before any money is spent.
2. The bishop's consent is not given without extensive consultation from the parish pastoral council, the parish finance council, the Diocesan Business Office, the diocesan building review committee, and the diocesan finance council. Each of these bodies is specially equipped to judge the prudence of each stage of the building process so that the parish receives quality construction at a reasonable price. "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?" (Luke 14:28)
3. If funds must be raised, the Diocesan Development Office will be happy to assist with fund-raising suggestions and information about trusted professional fund-raisers. Phone: (318) 445-2401 x209.
4. If a loan will be needed, the pastor (and his advisors) will need to visit with several loan officers to obtain the necessary details of loan requirements, rates, payback schedules, and the like. Note that most banks will require some percentage of the total cost of the project to be available in unencumbered cash before authorizing a loan. Extensive parish financial records will be invaluable in these meetings. A specific plan for repaying the loan—both principal, and interest—must be clearly demonstrated to the loan officer.
5. What follows in this article are the specific processes by which a project goes from conception to design to completion in the Diocese of Alexandria. Much of this process is complex and even tedious. The Diocesan Business Office is charged with the responsibility of assisting pastors in understanding the process and preparing the necessary documents. Pastors and lay advisors are asked to contact the business office before initiating these procedures.
6. 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:
  - 6.1. Phase I—Development of the Preliminary Concept and Consultation
  - 6.2. Phase II—Formal Design, Engineering, and Preparation of Bid Documents
  - 6.3. Phase III—Awarding of the Contract

6.4. Phase IV—Construction

7. 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.
8. Phase I, Development of the Preliminary Concept and Consultation: In this phase, **no professional is engaged and no funds are expended.**
  - 8.1. The pastor, after consulting his pastoral and finance councils as well as others in the parish, will present:
    - 8.1.1. a preliminary written description (not a drawing) of the construction or improvement project,
    - 8.1.2. an initial attempt at a detailed listing of what is desired in the building,
    - 8.1.3. a rough sketch (not a professional design) indicating approximate total square footage (if appropriate)
    - 8.1.4. the approximate cost of the project calculated per square foot,
    - 8.1.5. 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, prior capital campaign, fairs, bingo, etc. and the approximate time it took to accumulate these funds,
    - 8.1.6. proposed financing for both the construction loan and the mortgage, e.g. rate of interest, term of loan, etc.,
    - 8.1.7. plans for payment of any loan principal and interest—including the sources and amounts of this income such as sale of capital, on-going building fund, operating fund, anticipated capital campaign, fairs, bingo, etc., and the projected time it will take to amortize the loan,
    - 8.1.8. expected additional costs to the parish or school operating fund for the new project once it is operational, e.g., utilities, insurance, staff, etc.
    - 8.1.9. names and contact information for **potential** architects and the selection process for other professionals to be employed in the design phase, and
    - 8.1.10.a description of the means of construction. (In other words, will the work be done by a general contractor after a public bidding process, or are there other plans?)

- 8.1.11. All documentation must be in the Diocesan Business Office the first day of the month in which action is requested.
  - 8.2. After a meeting with the pastor and parish representatives (not any professionals) the diocesan building review committee will recommend to the diocesan bishop a course of action for the professional design and construction of the project. Prior to the committee meeting, some members may visit the construction site with the pastor and his representatives to gain information that will be reported to full committee.
  - 8.3. The diocesan finance council will review the financial data and will recommend to the diocesan bishop whether the project should move to Phase II.
  - 8.4. Having heard the diocesan building review committee and the diocesan finance council, the diocesan bishop will decide whether to authorize the pastor to proceed to Phase II and instruct him on any specific requirements.
  - 8.5. If a design professional is to be hired, a corporate resolution and contract are required. These instruments are to be submitted to the Diocesan Business Office in time for a comprehensive review. Form documents from the American Institute of Architects (AIA) are preferred. The instruments will be returned as soon as they receive a favorable review with the required amendments.
  - 8.6. The pastor is not authorized to begin the next phase or sign any contract until he is notified in writing by the diocesan bishop and receives the necessary corporate resolution.
9. Phase II—Formal Design, Engineering, and Preparation of Bid Documents: 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 submit plans. Great changes in concept and fluctuations in cost may happen between Phases I and II. Therefore, this phase may take more than a year or only a few weeks.
- 9.1. In the end, the pastor, after consulting with his pastoral and finance councils as well as others in the parish meet again with the diocesan building review committee and the diocesan finance council. He will be accompanied by a parish representative and a professional able to assist him in the presentation regarding the specific concerns of the committee in question:
    - 9.1.1. the name, firm, contact information, and qualifications of the architect;
    - 9.1.2. the approximate cost of the professionally designed and completed project;



- 9.1.3. itemization of unencumbered cash on hand from the parish available for the project indicating the specific accounts and institutions in which the assets are held;
- 9.1.4. a detailed letter from the lending officer or its equivalent on both the construction loan and the mortgage including 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;
- 9.1.5. plans for payment of any loan principal and interest including 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;
- 9.1.6. expected additional costs to the parish or school operating fund for the new project once it is operational, e.g., utilities, insurance, staff, etc;
- 9.1.7. the complete and final plans, drawings, and bid documents (as they will be distributed to bidders) or the final design documents;
- 9.1.8. minutes of the joint meeting 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; and
- 9.1.9. the 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.
- 9.1.10. All documentation must be in the Diocesan Business Office before the first day of the month in which action is requested.
- 9.2. The diocesan building review committee will review the plans and recommend to the diocesan bishop whether the project is ready to be put out for bid or immediate implementation of Phase III.
- 9.3. The diocesan finance council will review 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.
- 9.4. Having heard the diocesan building review committee and the diocesan finance council, 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.

- 9.5. 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.

#### 10.Phase III—Awarding of the Contract:

It is possible that the bidding may create a lapse of time between the submission of documents for Phase II and the beginning of Phase III. Under these circumstances costs have usually increased. However, if there is no bidding process and a very short lapse in time, simply submit the additional documents outlined below.

- 10.1. The pastor in consultation with his pastoral and finance councils as well as others in the parish will present to the Diocesan Business Office:

- 10.1.1. a complete copy of the successful bid for the completed project;
- 10.1.2. the exact contract (AIA forms preferred) that is to be signed by the pastor and the successful bidder;
- 10.1.3. a copy of the contractor's performance bond and current insurance certificate naming the parish and diocese as additional co-insureds;
- 10.1.4. from the design professional or successful bidder a schedule of payments to be 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;
- 10.1.5. the final total cost of the project including all design and construction costs, FF&E (fixtures, furniture, and equipment) permits, fees, and a contingency of 10% to 20% has to be included in this request;
- 10.1.6. an itemization of unencumbered cash on hand from the parish available for the project indicating the specific accounts and institutions in which the assets are held;
- 10.1.7. all construction loan documents that are to be signed by the pastor and a detailed letter from the loan officer concerning the mortgage, e.g., rates of interest, types and terms of loans, payment per month or per quarter, and penalties for early payment of principal, etc.;

- 10.1.8. plans for payment of any loan principal and interest including 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;
- 10.1.9. any expected additional costs for the parish or school operating fund for the new project once it is operational, e.g., utilities, insurance, staff, etc.;
- 10.1.10. copies of all other legal documents the pastor will execute;
- 10.1.11. minutes of the final joint meeting 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.
- 10.1.12. All documentation must be in the Diocesan Business Office before the first day of the month in which action is desired.
- 10.1.13. Ideally the schedule mentioned above in number 10.1.4. is an electronic spread sheet that automatically calculates such items as retainage, amount budgeted, amount expended, and balance for management of individual and overall costs during the construction phase.
- 10.2. The diocesan building review committee will review the construction documents and will recommend to the diocesan bishop whether construction should begin.
- 10.3. The diocesan finance council will review the financial data and will recommend to the diocesan bishop whether the financial matters and legal documents are in order and construction should begin.
- 10.4. Having heard the diocesan building review committee and the diocesan finance council (and if necessary the college of consultors), the diocesan bishop will decide whether to authorize the pastor to act to begin construction and instruct him on any specific requirements.
- 10.5. 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 prepared by the Diocesan Business Office and duly signed by the diocesan bishop or the vicar general.

## 11. Phase IV—Construction:

- 11.1. 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 for the project. All loan receipts for the project are to be deposited to this account.
- 11.2. 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.
- 11.3. With the quarterly report during the construction period, a copy of the schedule of payments shall be included along with an itemized accounting of the project checking account. 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.
- 11.4. The diocesan building review committee can be consulted at any time to follow the course of construction, report on progress of the work including any change orders, and respond to any questions the pastor may have. Make the request through the Diocesan Business Office.
- 11.5. 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 Diocesan Business Office.
- 11.6. A copy of the plans for the project as built including 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 for the project shall be placed in the diocesan archives.