

**Guidelines for the Clergy on the  
General Transfer of Parish Assignment  
2007-06**

**To: All Diocesan Parish Priests**

We will undergo a general transfer of assignments. This will happen to us as a Diocese for the first time. I am looking forward to an orderly and effective implementation of this plan. Hence, I am furnishing you with the following Guidelines which have been drafted, presented to you for comments and revised accordingly.

**1. PRE-TRANSFER PERIOD**

- 1.1. Each parish prepares the actual *plantilla* of all parish personnel, both salaried and volunteered, which states their responsibility flowchart, job descriptions and respective salaries, allowances and benefits. Employment documents are prepared, including personal/professional information sheet of each staff with significant incident report and evaluation, if any.
- 1.2. The current parish priest determines which personnel he recommends for retention, retirement, separation/termination and the like. He determines whether the parish is sufficiently, over or understaffed, and makes clear and concrete recommendations accordingly.
- 1.3. Of course, each *plantilla* is uniquely constituted. However, (2) two basic and recognized positions are consistent everywhere, namely, the one in-charge of the church (popularly called “*sacristan major*” or its equivalent) and the one in-charge of the parish office (better known as “parish secretary” or its equivalent).
- 1.4. In general, the incoming parish priest respects each history of service in the parish. He does not readily replace or dismiss any of them upon assumption to office. On the other hand, the outgoing parish priest does not automatically take any personnel with him. He first considers the capacity of the parish to which he is transferring and does not go beyond its allowable resources.
- 1.5. With the exception of household staff, the personnel who have served the parish for more than six (6) months, take priority over any of the personnel whom the new pastor brings with him.
- 1.6. To avoid compounding cost of and future complication regarding years of service, the personnel (especially the secretary or the sacristan) whom the outgoing pastor decides to take with him, are given corresponding service/gratuity pay for the years rendered so that he/she begins

- employment anew and receives salary/allowance in accordance with the capacity of the new parish.
- 1.7. The matter regarding personnel is the priority agenda that is discussed and clearly agreed upon by the incoming and outgoing parish priests. Best efforts are exerted and proper processes observed to avoid future disputes and complications and ensure justice and compassion both to the employees and the priests concerned.
  - 1.8. The outgoing pastor does not make last-minute major decisions or so-called “midnight transactions” that will compromise the incoming pastor. He does not initiate major projects three (3) months prior to scheduled transfer.
  - 1.9. All financial documents until the end of 2006 are submitted to the Chancery or directly to RCAM for auditing. Necessary summary reports are prepared for turnover purposes.
  - 1.10. As a general rule, all payables are settled according to the financial capacity of the parish. If such is not possible, the parish priest issues certificates attesting to all official and recognized loans made in the name of the parish with proper supporting documents and possible means and sources for future settlement.
  - 1.11. For safe keeping and proper recording, each parish turns over to the chancery the original copy of all documents regarding land/infrastructure purchase and ownership, lease of any property, contracts/MOAs, building plans and permits and the like.
  - 1.12. The outgoing parish priest makes a thorough inventory of all properties including a report of all past, on-going and future construction and renovation. Among other things, the report indicates encountered or foreseen issues or problems especially of the current construction/renovation or maintenance of infrastructure, properties and equipment. Projects planned and envisioned, including infrastructure master plan, are endorsed in writing to the next parish priest if the latter is expected to perform along the direction of such projects.
  - 1.13. The church, offices and facilities, and rectory are cleaned prior to actual arrival of the incoming parish priest. Necessary repairs are undertaken to remedy especially perennial concerns on plumbing, electrical wiring and the like. Availability of basic facilities like water and electricity is to be ensured. Particular attention may be given to prepare the parish priest room in accordance with the reasonable specifications of the incoming priest and with the allowable resources of the parish.
  - 1.14. Of course, the outgoing pastor does not take out furniture, fixtures, appliances and other items included in the official inventory. However, if there are basic items belonging to the priest such as beds and beddings, dining/cooking utensils, and the like which he decides to take with him, the outgoing pastor must provide equivalent, if not better quality items for the use of the incoming parish priest. Provision for at least a week

supply of groceries, fruits, toiletries, cleaning materials and the like is allocated.

- 1.15. The basic working principle is that while the outgoing priest provides as generously as possible for the incoming pastor, the latter must be content and thankful. The latter does not immediately purchase large items or renovate far and beyond what is necessary.
- 1.16. Caution is made by the incoming pastor not to disrespect the outgoing by readily imposing himself. It must be noted that the incumbent is still the official parish priest until the actual date when the appointment of the new parish priest takes effect.
- 1.17. It is incumbent upon the outgoing pastor to catechize parish leaders and parishioners of the benchmarking programs of the diocese and of its policy particularly on the general transfer. It is his responsibility to neutralize manifestations of opposition which will make it unnecessarily difficult for the next pastor to assume his new office due to unwelcoming, if not hostile, atmosphere.
- 1.18. To effect the above provisions and for purposes of leveling-off, orientation and initial acquaintance and discussion, the following meetings are required prior to actual movement:
  - 1.18.1. incoming and outgoing pastors (including a concelebrated mass where the outgoing formally introduces the incoming pastor to the people)
  - 1.18.2. the two pastors with the bishop and/or his delegate/s on the presentation of the structured list of parish personnel by the outgoing
  - 1.18.3. the outgoing pastor and the chancery/finance & property staff
  - 1.18.4. the two pastors with the parish staff
  - 1.18.5. the two pastors with the parish pastoral council or its executive committee

## 2. ACTUAL TRANSFER

- 2.1. Appointments are issued first week of Easter 2007 and are available in the chancery for pick-up only by the priest concerned from April 9-13. Each priest receives his appointment to his new assignment and the appointment of the incoming pastor.
- 2.2. While the actual transfer is scheduled from 28 to 31 of May 2007, the outgoing and incoming pastors agree on the exact day of the new pastor's arrival in the parish and inform the chancery/finance office of the same. Chancery/Finance staff may perform series of scheduled visits to the parish a few days prior to actual arrival of new pastor to assist in the preparation of final documents, inventory of keys & locks, transfer of bank account names & signatories and in the accomplishment of all check list and necessary forms.
- 2.3. Upon arrival of the new pastor, the outgoing presents the following:

- 2.3.1. Canonical Books on Baptism, Confirmation, Marriage, Full Reconstruction of Records, Modification of Records, *Liber Defunctorum* and *Conversionum*. All pages of said books during the term of the outgoing should be signed by him, with the last book, page & line of the last entry signed likewise by the Vicar Forane; and signed-received by the new parish priest.
- 2.3.2. Files pertaining to sacraments, official communication of the parish, circulars and other letters
- 2.3.3. Archives of records such as Decree of Establishment of the Parish, official history record, Decree of Revision of Territorial Boundaries of the Parish, copy of land titles, map of parish territory and the like
- 2.3.4. Diary Schedule of upcoming activities, events and celebration of sacrament and sacramental, together with the black & white copy of official and regular parish schedule of Masses and other sacraments
- 2.3.5. Financial documents, checkbooks, keys & locks, inventory and checklist

### 3. POST TRANSFER

- 3.1. The new pastor, first and foremost, gives time to know the community and each member thereof and likewise gives the community time to know him. His primary task is not to immediately change policies, structures and ways of doing things at least during the first six (6) months of his office. Rather, he first wins hearts and minds of parishioners to establish rapport and trust.
- 3.2. It is to provide pastoral and administrative continuity that the current Parish Pastoral Council (PPC) is allowed to continue serving the parish. However, to give the new pastor a free hand and to provide the parish the opportunity to select new leaders as well as to allow the incumbent much-needed rest, and without prejudice to existing PPC guidelines regarding the term of office, the new pastor may request for a courtesy resignation of the Council officers and members after six (6) months upon his assumption to office.
- 3.3. Upon effectivity of resignation by PPC officers and members:
  - 3.3.1. The new pastor takes proper initiative to re-establish the PPC by the process of election and/or selection in accordance with the existing and working PPC norms and guidelines. In the absence of such guidelines, the new parish priest spearheads formulation of the same in a collaborative and participative manner.
  - 3.3.2. The pastor in accordance with parish leaders re-establishes the PPC not later than one (1) year after the resignation of the previous council officers/members takes effect, unless a particular situation warrants otherwise. However, such decision

to prolong re-establishment of PPC is made in consultation with parish leaders and representatives of ministries and organizations and approved by the Bishop.

- 3.3.3. In cases where the creation of PPC is not yet feasible, the new pastor may create a temporary pastoral team whose main function is to assist the parish priest in the administration of pastoral affairs, which includes preparing the parish in the election/selection of the new parish pastoral council. This temporary council does not hold office for more than one (1) year.
- 3.4. To better acquaint the pastor with the situation of the parish during the period of “settling down,” and for the parish to turn a new chapter in its pastoral life as a church with a new pastor, it may be an opportune time for the parish to undergo a process of internal and environmental assessment, i.e., systematic gathering and collation of data pertinent to the parish and its environ. This can be done within the first four months of the new pastor’s assumption to Office in view of the parish strategic planning before the year ends. If the parish already has an existing plan, this can be the time to revisit and make an evaluation of how the plan has so far been carried out and how the rest of the scheduled activities will be implemented. The parish may employ the help of the Office of the Vicar General for Pastoral Affairs on these matters.
- 3.5. The new pastor consults with the previous pastor, and if necessary, with the bishop if he deems it necessary to implement a substantially new activity or project within his first six (6) months. In any case, it must be noted that pastors are more than effective administrators, or goal-oriented managers. They are leaders who effect change together with and not apart from the community.
- 3.6. It is important that the new and the previous pastors constantly maintain an amicable relationship. The new parish priest observes extreme caution in even insinuating or allowing others to imply negativities about the previous pastor. He is careful not to prove himself before the parishioners at the expense of his brother priest. As a general rule the previous and the present pastors keep an open line of communication at least during the first year.
- 3.7. The previous pastor gives allowance for the new pastor and the community to adjust. He avoids accepting invitations from parishioners to exercise ministry within the vicinity of his previous parish for at least a year unless the current parish priest initiates the invitation. Also, he makes an effort to place a limit to the visits of former parishioners. He rather encourages them to spend more time with the new pastor.
- 3.8. The previous pastor exerts all efforts to support the new pastor. He never entertains complaints of previous parishioners nor extends his pastoral influence on them at the expense of the new priest. Rather, complaints against the pastor are at all times addressed either to the

concerned priest or, if such is no longer feasible, to proper impartial authorities. In cases where conflicts between previous and new pastors are starting to brew, either of them must not hesitate to immediately approach proper impartial authority for quick intervention.

- 3.9. It is the immediate responsibility of Vicars Forane to sense potential problems and developing conflicts. He acts appropriately by settling the issues in accordance with the principle of subsidiarity.
- 3.10. Vicars Forane, when applicable, are elected on the first regular clergy meeting after the actual transfer of parish assignments in accordance with the approved process of election.

The period between the issuance of these Guidelines and the actual dates of transfer is crucial. Let us use this time to prepare ourselves and our people not only in the administrative and pastoral aspects, but more importantly, in our constant effort at renewal of commitment to be more faithful to our calling as a community of servant leaders. It is providential that this period coincides with the Lenten Season, which calls in a special way for conversion – a rending of hearts -- through prayer, acts of sacrifices and charity. It is within the spirit of Lent that we do the most we can of what is new and, perhaps, burdensome so we can move on from our past practices and more relevantly respond to the challenges of the present times.

I pray that all of us can see that what we have been doing as a diocese, essential to which is the transfer of assignments, is to shape a structure and create an atmosphere where the values of stewardship, ministerial collaboration, fraternal sharing and solidarity as workers in the Lord's vineyard may continue to grow in us.

May we always be guided by our Lord's wisdom and compassion.

Given in the Chancery in Fairview, Quezon City, this 23<sup>rd</sup> day of February, in the Year of Our Lord 2007.

**Most Rev. Antonio R. Tobias, DD**  
Bishop

Attested by:

**Rev. Fr. Jaime Z. Lara**  
Chancellor