

## Pastor's Exit Report Upon Transfer

This report is prepared by the outgoing Pastor and various councils and committees. It is designed to give a thorough background of the parish/parish life. The information provided will make for a smoother transition of leadership. The following information needs to be in writing with backup documentation provided in a binder.

### Report about the Parish Trustees

- Who are the parish trustees?
- How are they chosen?
- When are their terms over?
- How involved are they in parish meetings?

### Report about the Pastoral Council (Is there a council yes or no)

- What are the scheduled dates of meetings.
- Copies of the current fiscal year's agenda and minutes.
- Summary of unfinished business.
- Dates of elections and process used for elections.
- Terms of current members.
- Are there elected officers within the council? How and when is this accomplished?
- Is there a parish mission and vision statement and when was it last revised?

### Report from the Pastoral Council (not to be read by the outgoing pastor)

- What legitimate concerns/issues exist at the present time in the parish?
- Are there any specific hurts that need to be addressed?
- What specific issues does the new pastor need to be aware of?

### Report about the School Advisory Council (Is there a council yes or no)

- What are the scheduled dates of meetings.
- Copies of the current fiscal year's agenda and minutes.
- Summary of unfinished business.
- Dates of elections and process used for elections.
- Terms of current members.
- Are there elected officers within the council? How and when is this accomplished?

### Report from the School Advisory Council

- What are the enrollment trends over the last 3 years?
- How are teacher wages determined and when?
- How is the budgeting process for tuition, fundraising, subsidy, accomplished?
- Are the clergy involved in the teaching or visiting of classrooms?

### Report about the Finance Council (Is there a council yes or no)

- What are the scheduled dates of meetings.
- Copies of the current fiscal year's agenda and minutes.
- Summary of unfinished business.
- Dates of elections and process used for elections.
- Terms of current members.
- Are there elected officers within the council? How and when is this accomplished?

### Report from the Finance Council

- Are the financials prepared by support staff from the Diocese or another individual?

- What software is used?
- Provide copies of the last 2 fiscal years' budgets.
- Provide copies of the last 2 fiscal years end of year statements and balance sheets.
- Provide a list of parish debt and repayment schedule.
- Provide the budget for the upcoming fiscal year with breakdown of salaries, major repair, plan for repayment of loans.
- Provide a list of all banks and money management firms the parish is currently using.
- What arrangements have been made for the transfer of signatures on all financial accounts and parish credit card accounts.
- Are there any financial transaction accounts where the pastor is not on the signature card?
- When was the last capital campaign and what is its history?
- When and who has been the spokesperson for any parish stewardship talks or work, in the last year?

Report about the Buildings and Grounds committee (Is there a committee yes or no)

- What are the scheduled dates of meetings.
- Copies of the last fiscal year's agenda and minutes
- Summary of unfinished business
- Dates of elections and process used for elections.
- Terms of current members
- Are there elected officers within the council? How and when is this accomplished?

Report from the Buildings and Grounds committee

- Is there a detailed list of major repairs and last dates of completion?
- Is there a process for noting short term repairs and maintenance needs?
- Is there a list of future capital improvements and needs to be addressed?
- Are there any issues with equipment or aging of equipment on the parish campus?

Report about the Liturgy Committee (Is there a committee yes or no)

- What are the scheduled dates of meetings.
- Copies of the last fiscal year's agenda and minutes.
- Summary of unfinished business.
- Dates of elections and process used for elections.
- Terms of current members.
- Are there elected officers within the council? How and when is this accomplished?

Report from the Liturgy Committee

- How and when does planning take place for the seasons of Ordinary, Advent, Christmas, Lent, Easter?
- Who plans the wakes, funerals, wedding ceremonies and the preparation of families for these events?
- Are there any local customs regarding any of these special liturgies?

Report about the Cemetery Committee (Is there a committee yes or no)

- What are the scheduled dates of meetings.
- Copies of the agenda and minutes.
- Summary of unfinished business.
- Dates of elections and process used for elections.
- Terms of current members.
- Are there elected officers within the council? How and when is this accomplished?
- Who is the sexton? What duties does he/she perform?

#### Report from the Cemetery Committee

- Who are the most common funeral homes and directors used?
- Are there policies for funerals without a funeral home?
- What % are full body and % cremains?
- How many graves are occupied, how many left to be sold?
- Is the perpetual care fund healthy?
- When were the rates charged last reviewed?
- Is there a columbarium?
- Is there a process for noting short term repairs and maintenance needs?
- Is there a list of future capital improvements and needs to be addressed?
- Are there any issues with equipment or aging of equipment on the cemetery grounds?

Report on each special organizations that function in the parish: Lay Spiritual Directors, Knights of Columbus, Catholic Daughters, Altar Society, Christian Mothers, Moms Group, Cursillo groups, Seven Sisters, Catholic United Financial group, St Vincent DePaul group, Befrienders, others:

- Who are the officers or contacts for each group? Phone number and email?
- How often do they meet?
- Are they anticipating the participation of the priest, with what frequency and in what capacity?

#### WORSHIP

- Mass schedule - Sunday, weekdays, holydays, Holy Days of Obligation, Christmas, Triduum and Easter.
- Are there regular celebrations in Nursing Homes?
- How many nursing homes are there?
- Is there a traveling mass kit available?
- How have changes to the schedule been made in the past?
- Are mass counts maintained, by whom?
- How does the pastor access these?
- Are there any special masses throughout the year? (hunters' mass, mass of remembrance, mass for babies who died before birth)
- What are the arrangements for bringing Holy Communion to the sick, homebound? Who coordinates this ministry?
  
- The normal Sacrament of Reconciliation schedule
- How are seasonal celebrations such as Advent or Lent handled with communal times or increased hours by the local priest?
- How many priests assist?
  
- When are baptisms celebrated?
- What preparation is required?
- Who does baptismal preparation?
- Who records in the sacramental books.
  
- Are there special times for the Sacrament of the Anointing of the Sick?
- When is it celebrated in nursing homes and the parish?
  
- When and how often is Confirmation celebrated?
- Who is in charge of the preparation?
- Describe the preparation program.
- Who records in the sacramental books?

- When and how are students prepared for First Reconciliation and First Holy Communion?
- Who is in charge of the preparation?
- Describe the preparation program.
- Who records in the sacramental books?

#### Weddings/Validation process

- What is the average number of weddings per year?
- List the current or planned and status of each scheduled marriage.
- Who helps plan weddings?
- Does the parish have Marriage Prep couples?
- What are the wedding liturgy policies?
- Are there any local customs?

#### Funerals:

- What is the average number of funerals per year?
- Who helps plan the funerals, is there a parish committee?
- What is the parish meal policy for a funeral?
- Are there any local customs?

#### Adult Faith Formation

##### Parish Mission

- When was the last time the parish had a parish mission/retreat?
- Who was the presenter?

##### RCIA/OCIA

- How many participants the last 2 years?
- When are classes held?
- Who coordinates the program?

##### Small groups/Personal development

- Does the parish provide opportunities for small groups sessions?
- Who coordinates this program?
- How often have small groups met?
- What type of small groups are most common?
- Are articles or books given as gifts to adults at Christmas or easter?
- Who chooses them?
- Are sacramentals available for sale or given away?
- How are the clergy involved with small groups?

##### Faith Formation/Religious Education

- What is the schedule for the year?
- Who are the coordinators if it is broken by age group?
- Are the coordinators on the parish payroll or volunteers?
- What curriculum is used? When was it last reviewed?
- Are the Diocese prayer standards being implemented?
- How is the pastor involved in the RE program?
- Is there a vacation bible school, catechesis of the Good Shepherd, feeding the faith program?

#### Parish School

- What grades are in the school?
- How long has the principal been employed by the school?
- How is the pastor involved in school activities?
- When is the next accreditation cycle?
- Is there a healthy balance between tuition collected and parish subsidy amount?
- Has there been a healthy endowment established for the school?

#### Youth Ministry

- How is the youth ministry coordinated?
- Are youth ministry and high school FF considered the same ministry?
- How are service projects and camp attendance promoted?

#### ADMINISTRATIVE Items:

##### Deacons:

- Who are the deacons and their contact information?
- How are ministries shared?
- Masses
- Homilies
- Baptisms, weddings
- Wakes and funerals
- What are the skills and gifts of each deacon?

##### Staff:

- Who are the key personnel in the parish?
- Is there a job flow chart showing who is responsible for what tasks?
- Is there a written record of who covers if they are sick or on vacation?
- Are there staff meetings on a regular basis?
- If on the payroll are there:
- Job descriptions,
- Signed contracts,
- Annual reviews?

##### General items of interest:

- How is the annual parish calendar of events maintained?
- Please provide a printout noting special days and events for the new fiscal year.
- Is there a process for a review of the financials by a CPA?
- Who processes the payroll and Human resource items for the parish and school?
- Who maintains the sacramental records?
- Who maintains the corporate proxy requests and books?
- Is there a listing of passwords, combinations, and key control?
- Who is responsible for building security?
- Open doors and when? Daily and pre mass?
- Lock doors at night and when? Daily and post mass on weekends?
- If the pastor is not available who is responsible for opening/securing doors for events?
- Are arrangements made for items such as lawn and snow care?
- Is there a parish bookkeeper? Who makes the deposits and writes the checks?
- Is there a sister parish arrangement?

#### Campus maintenance issues

- Is there a list of normal contacts and numbers in the event of problems with water, heat, electricity, garbage, phones, copier, snow removal?
- Are there any interesting quirks with the campus or facilities?

#### Community relationships

- Is there a ministerial association in the community?
- Is there a local pregnancy center?
- How are requests by the poor and needy handled in the parish? Who responds?
- Is there a local Churches United, or St Vincent DePaul group in the community?
- How involved is the pastor?
- How often are ministries such as Food for the Poor, Unbound, Cross Catholic Outreach invited in?
- Is there a local hospital? Are there chaplains serving? How are you notified if there is an emergency or a catholic registered as a patient?

#### VOCATIONS

- How are vocations promoted in the parish?
- Are there any young men in formation for the priesthood?
- Is the diaconate promoted and encouraged? By whom?
- Are vocations to the sisterhood promoted?