

A Synodal Approach to Parish Administration

Parish Administration Resource Booklet



Prepared by E-VAAC Group
June 2023

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Aim:

To Build more Vibrant Parishes

Coverage:

Systems, procedures, and documentation

Application:

Reviews, handovers and orientation of seminarians and parishioners

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A Synodal Approach to Parish Administration

Blessings and Endorsements

- 1. Cardinal Oswald Gracias**
- 2. Bishop of Poona**
- 3. Synod Convenor – Poona**
- 4. Pastoral Clergy**
- 5. Senior religious priests**
- 6. Religious sisters involved in parish apostolate**
- 7. Parishioners and council members**
- 8. Seminary Rectors and Directors**
- 9. Academic Leaders**
- 10. Indian Christian Entrepreneurs**

Blessings from Cardinal Oswald Gracias

Synodality is Church journeying together, guided by the Holy Spirit speaking to us and in us. The togetherness as we journey is the spirit of Synodality. Each phase of the Synod; the consultation, the discernment and the implementation illustrates this characteristic.

The Ordinary General Assembly of the Synod of Bishops is fast approaching. The next phase is the process for the Implementation of the Synodal findings. This is crucial to the success of the Synod. I am aware of Cardinal Mario Grech, General Secretary for the Synod of Bishops concern in this regard and his encouragement to those who wish to explore the possibility of sustainable implementation. I too have been kept informed of such activities from concerned organizations and groups across the world, including the one from Poona of the Western Region of India. I am immensely impressed by the comprehensive document that has been developed with the involvement of the Laity, Priests, Religious and Institutions of formation across India and the world. This document will have an incredible impact in three areas.

Bringing greater engagement and awareness of laity about the functioning of parishes. Second, it will ensure more efficient handovers and genuine stability of parish functioning and thirdly it would be a useful resource for the training of future clergy.

I wish you all the best and may God bless all of you for this important contribution to the Church.

Bishop of Poona

The Synod on Synodality marks a paradigm shift from an event into a process which develops in successive phases. The “preparatory phase, the celebratory phase, and the implementation phase.” The purpose of the first phase is the consultation of the People of God at the level of the local churches. It is this consultation that makes possible the process of discernment by pastors, Local ordinaries, Episcopal Conferences, Council of Patriarchs, and other such bodies. The outcome from such a broad and participatory synodal journey cannot bear fruit without the third phase, that of implementation, the indispensable means of renewal and reform of the Church.

Evidently, implementation of the Synod findings is the key to a vibrant Church. Cardinal Mario Grech, the General Secretary for the Synod of Bishops very emphatically expressed concern over the implementation of the Synod findings. I too very firmly encouraged the Synod convenor of my Diocese to set up a team to determine ways and means of enhancing the participation of all. We initiated this effort 9 months ago and met regularly to devise ways and means to encourage participation. One of the most promising outputs is the “Parish handover resource document. I congratulate the team on the output but caution them not to expect immediate results. The effort of implementation requires patience as it necessitates appropriate orientation and a change in culture.

Poona Diocese Synod Convenor

The Synodal process launched by His Holiness Pope Francis has made us realize that the Church can go far, but not without the full involvement of the Laity. The role of the lay faithful becomes all the more necessary as we embark on our journey of credibility. The need of the hour is transparency and accountability. It is here that not only the involvement, but the expertise of the laity has a pivotal role to play. The “Parish Handover – Takeover” is a very valuable resource. The process of implementation will require that the personnel involved will need to be oriented and guided to bring it to fruition. This document will go a long way in making Synodality the way of being Church in the third millennium.

Endorsements continued on Page 93

Document: WHO – HOW - WHY

This section acknowledges the support and **contribution** of the many individuals and groups mentioned and those that prefer to remain unknown. A brief account on the document **preparation** is also included, in addition to the **rationale** that prompted the synodal efforts in this direction.

1. Contributors

Individuals and groups that contributed towards putting together this document.

The main contributor was the **Poona Diocese Synod Sustainable Implementation Exploration Project (PDSSIEP)** core team. The PDSSIEP team was formed on 25 July 2022. This initiative was prompted by Cardinal Mario Grech who responded positively to E-VAAC’s mail that expressed concern about the implementation of Synod findings. Appreciating the situation and Cardinal Grech’s response, the Bishop of Poona and the Poona Diocese Synod Convenor encouraged the PDSSIEP initiative, besides actively participating in the journey.

• **PDSSIEP TEAM**

Bishop of Poona: Bishop Thomas Dabre

Poona Diocese Synod Convenor: Fr Roque Green

Diocesan Clergy: Fr Roque G, Fr V Johns, Fr Wilfred F, Fr Lui H.

Men Religious: Fr Michael F - SDB, Fr Roxy F - MSFS, Fr Robert D - SJ and many others

Women Religious: Sr Maria G - FS, Sr Shubhangi - FS, Sr Sunanda - FS, Sr Bromadine – SCC, Sr Angela A - SCC, Sr Marina T – SU, Sr Divya - SU, Sr - Betty - SU, Sr Marina G - SJC, S Sunita X - MMS, Sr Anita K – MMS and many others

Parishioners and Council Members: Nepo Fernandes, Cyril Crasto, Ms. Monica D’Souza, Ms. Deepti Panpatil, Ms. Mary Johnson, Anthony Kardak, Alan D, Emanuel Brags, Brian Pereira, Edmond Britto, Ms. Colleen G (Secretarial Support) and many others

• ***E-VAAC Mail to Cardinal Mario Grech - Extract:***

The church needs concretization of concepts with goals, action plans and implementation progress monitoring to regain the trust of the faithful. This is possible by changing from “Preach and Pass-on” to “Preach, Plan and Practice”.

Query raised with Card Mario Grech: *Are we to be concerned about Synod 2023 meeting the similar fate of Vatican II and other encyclicals?*

Response from Card Mario Grech: *There is a concern but will address the issue post diocese report collection.*

It is known that many implementation issues would be diverse and complex. This makes it imperative for the hierarchy to come out with well thought out issue handling strategies at the pre-release stage. Also, a plan for putting mechanisms in place to handle document cascading, both educational and practical, would go a long way for execution success. This approach would make the documents more acceptable to the faithful and in turn lead to better traction on the ground.

One way to do this could be to develop a rough framework for alternate action plans that can be shared, on a specific basis, after the document has been released. This could be made possible by the formation of an apex diocese group at the Diocese level (In this case the PDSSIEP Core Group).

The first outcome of PDSSIEP was the “Resource Document for Parish Handover and Takeover” which encourages lay participation which is at minimal levels today. This was further expanded to cover parish administration in the larger context.

We gratefully acknowledge the many Archbishops, Bishops, Superior Generals, Provincials, men and women religious, senior diocesan clergy, seminary rectors and directors, pontifical institute presidents and professors, lay persons and others who silently contributed and encouraged this effort from behind the scenes.

2. Preparation

How this document was prepared

This generic document has been prepared through an iterative process by taking inputs from bishops, experienced parish priests, lay council members and religious members who have been engaged with the functioning of parishes. These have come from several dioceses across the world. Over discussions it was found that many additions came from the pains experienced by parish priests during and after the takeover. These were caused by the specific parish nuances and peculiarities unknown and unexperienced by the new incumbent.

This document is aimed to be of use to: (1) Bishops – to guide parish priests (2) Parish Priests preparing to handover – as a checklist for preparation (3) Parish Priests who are taking over – as a checklist to request more comprehensive information (4) Diocese team overseeing the Handover and Takeover – to ensure a more comprehensive and smoother process (5) Laity and Religious – for training and education to enable more meaningful engagement.

3. Rationale

While on the synodal journey the consultations brought some insight into the situational context at the parish level. It started from seminary formation review of a newly ordained clergy's "Role Readiness" for a parish appointment. Their formation appeared to be inadequate for managing parish administration. This led to the review of parish administration and knowledge transfer of newly ordained clergy. The findings were that robust and standard systems and processes were mostly not in place and if some documentation existed it was far from comprehensive.

A brief study finding of (1) parish functioning, (2) role and challenges of parish priests as well as (3) why good priests are losing interest in the church is given below:

Parish Functioning and Challenges of Parish Priests

- 1. The continuity of the parish activities changes with every new PP.*
- 2. The bishop's appointee does not make regular 'Finance and Administrative Review' visits. If done the review depth is not comprehensive.*
- 3. The PP Handover and Takeover exercise is not comprehensive, overseen seriously, and laity are not involved.*
- 4. The Handover-Takeover records are not tracked for future use. E.g., Bishop candidate recommendations.*
- 5. Parish priests are overburdened, under supported and inadequately trained for the roles they perform.*

Role and Challenges of a Parish Priest

Running a parish is a challenging and complex task that requires a lot of dedication and hard work, besides continuous training, support, and mentorship. A brief overview of tasks include: (1) Sacraments and Sacramentals (2) Pastoral Care (3) Managing Ministries (4) Volunteer Recruitment (5) Collaboration – Clergy, religious and others (6) Finances (7) Facilities Management (8) General Management – Legal, trusts, property, government compliance, etc. (9) Personal Upgrading - knowledge and skills (10) Managing Staff

Why good Priests are leaving or losing interest in the Church.

The main reasons found why priests are leaving and losing interest in the Church are: (1) Personal (2) Burnout (3) Dissatisfaction with the Church's direction or policies, including governance on important issues – they feel disillusioned (4) Conflict with Church authorities (5) Spiritual struggles.

Summary and Conclusion

This document was prepared with a dual purpose: To help bridge the parish administration gaps and at the same time facilitate a synodal approach to parish administration.

We find that the Synod consultations has and continues to bring out the need for greater laity engagement in the functioning of the church. These observations if translated into action at the parish level, which is the face of the church, will lead to vibrant communities which in turn will result in a more vibrant Church.

Challenges: The Synodal approach at the parish level will provide the much-needed support for the overburdened parish priests. A few challenges to be addressed along the way to vibrancy would be:

1. **Awareness Creation:** It is important to create awareness of the Parish situation among all stakeholders. *(Most stakeholders are aware of parish functioning to a greater or lesser degree of depth and spread. However very few have a holistic picture of the complexity of running a parish)*
2. **Attitudinal change:** This will facilitate the spirit of consultation and journeying together – Bishops, clergy, religious and laity. *(The current psyche of most stakeholders is that the functioning of the parish is someone else's responsibility. If something is not happening others are to be faulted. This attitude is also prevalent among the clergy. Common complaints "parishioners are not volunteering or participating, what can I do?"*
3. **Formation and Training:** This will help clarify the scope and responsibilities of all entities involved. *(Most formation focus is on the Spiritual, Human, Intellectual and Pastoral level. The operational functioning is not given much importance or attention. This is taken for granted though 70% of clergy time goes in operational activities.)*
4. **Phased Implementation plan:** This needs to be put in place and progress continuously monitored. *(The church does not have a practice of putting in place plans for implementation and following through. Things are left to the will and interest of the faithful. This does not work in real life as continuous reminders and motivation is required to keep the spirit of synodality going.)*
5. **Governance of Implementation:** This must be from the top and visibly cascaded to all levels. *(Governance of the functioning of a parish must be from the top as at the local level parish priests and parishioners can get sidetracked or lost in specific areas of interests and pay less attention to others. Higher level guidance and support will help parishes to stay on track and at the same time bring harmony across dioceses. This process of governance will provide a system of interaction*

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that will bring about transparency, understanding and mutual respect, as well as
support among all entities.)*

The Booklet: The booklet is divided into 5 parts that cover the basic functioning of parishes. The details shared below, have come to light while exploring the parish handover process when a new incumbent takes over.

1. **Introduction:** The introduction focuses on the Parish Handover - Takeover Protocol. This activity was selected as it covers the complete aspect of parish administration. A sample executive summary and handover checklist is included to provide a comprehensive overview of parish administration.
2. **Planning:** The planning section includes a tool to measure the current state of parish vibrancy which results from effective parish administration. It also covers a sample of a parish pastoral plan. All parish activities are geared to facilitate pastoral plan goal achievement.
3. **Operations:** The parish operations section covers all the parish functions carried out to run an effective parish that is aligned to meeting the goals of the pastoral plan. It includes the parish calendar, ministries councils and the parish diary besides others.
4. **Administration:** The parish administration section covers the systems and processes along with templates and documentation required to maintain the smooth functioning of the parish. It also includes the parish code of canon law.
5. **Annexures:** The Annexure section provides outlines and examples together with details of all activities mentioned in parts 1-4. It also provides some researched general information to assist readers in appreciating the different aspects shared in the booklet.

Through this booklet we appeal to those shareholders who wish to take responsibility for building a more VIBRANT CHURCH. This is our prayer.

Report Structure and Content

<p>Part 1 Introduction <i>(Page 12)</i></p>	<p>1. Parish Handover - Takeover Protocol 2. Executive Summary + Review Comments 3. Parish Handover – Takeover Checklist Elements</p>
<p>Part 2 Planning <i>(Page 18)</i></p>	<p>4. Parish Vibrancy Outlook 5. Parish Pastoral Plan</p>
<p>Part 3 Operations <i>(Page 26)</i></p>	<p>6. Parish Calendar and Parish Diary Details 7. Parish Ministries and Groups <i>(Zones, Youth Group, Choir, SSVP, Self Help Group (SHG), Legion of Mary, Sunday School, Prayer Group, Liturgy Group, Senior Citizen Group, Small Christian Community, Women’s Group, Altar Servers, Burial, Outreach, Others)</i></p> <p>8. Parish Pastoral Council and Finance Council 9. Other Important Functions 10. Important Persons in Parish Area (Influencers)</p>
<p>Part 4 Administration <i>(Page 31)</i></p>	<p>11. Administrative and other areas <i>(Accounts and Finance, Security, Property and Property Maintenance, School, Trusts, Cemetery, Contractors and suppliers, Chapel/Shrine, Inventory, Permanent and temporary staff, Others)</i></p> <p>12. Document Authorization 13. Parish: Code of Canon Law</p>

<p>Part 5 Annexures <i>Outlines & Examples</i> <i>(Page 35)</i></p>	<ol style="list-style-type: none">1. Pastoral Plan2. Parish Calendar3. Finance4. Fundraising5. Trusts6. Administration7. Inventory8. Property9. Maintenance10. Advisors (Legal & Others)11. Sample - Diocese: Parish Priest Handover Document12. Sample - Religious: Parish Priest Handover Document13. Model Parish Handover Review - Proof of Concept14. General Information – Parish Handover and Takeover
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Part 1 - Introduction

1. Parish Handover - Takeover Protocol

It is generally the responsibility of the diocese or province to ensure the appropriate procedures are in place to facilitate a smooth transition from one parish priest (PP) to the next. These guidelines will help to support the process. An important point to note, especially in the parish context, is the selection and appointment of handover overseeing members by the diocese or province.

It is important when a PP leaves a parish there should be formal handover procedures in place. This will ensure all key documents including financial accounts are carefully documented with up-to-date information. This document is to support the overseeing members to facilitate an effective handover procedure.

An appropriate mechanism will ensure professional handing over of relevant documents. Some simple pointers for organizing handing and taking over are given below:

1. Prepare a comprehensive list of Handing over Documents (The checklist in point 3 may be used for reference)
2. PPs may appraise their respective teams of the work plan and timeframe. (A joint workshop/orientation program would be a useful approach to get all persons on board. This includes the overseeing member, PPs and their teams)
3. Complete the important tasks within a planned and mutually agreed time window. (approx. 1-2 weeks)
4. Consult your companions and build a task force for the document review (Applies to both PPs)
5. PPs should personally take over key documents.
6. Get personally apprised of the culture and pulse of the parish.
7. Ensure future plans, commitments and established goals are fully shared.
8. Seek commitment for future support and guidance for a set period (3-6 months)

Suggested Procedures

1. The outgoing PP must ensure all elements contained in the handover procedures (Checklist) are completed before the leaving date.
2. It is good practice if these handover documents are regularly updated and maintained so that other members have access to information in the absence of the PP. This will also make the handover process easier.

3. The outgoing PP and incoming PP must discuss and agree on the handover checklist prior to the start of the handover discussions. This checklist should be used as a verification reference at the time of signoff.
4. The outgoing PP and incoming PP may bring their own teams (Qualified, experienced, and specially trained) for support in the handover and takeover. These persons must be acceptable to both parties as well as the overseeing manager. Engagement of lay persons in the process is recommended.
5. The incoming PP should have discussions with the parish council, finance council, area leaders and major ministries to understand the parish operating practices and traditions in the presence of the outgoing PP.
6. The overseeing member may also bring his own team to assist in facilitating the discussions between the handing and taking over teams.
7. The incoming PP must check that the handover checklist is completed, and documents identified. If there are any discrepancies, incomplete or missing documents, this should be addressed as soon as possible and rectified before the outgoing PP leaves. The overseeing manager should ensure that this is done.
8. If there is a situation where the incoming PP is not known, then the outgoing PP should go through the handover checklist with the assistant PP and parish council senior members, in the presence of the overseeing manager.
9. The overseeing manager must ensure that the checklist is signed by the outgoing PP.
10. A copy of this ‘handover checklist’ to be signed by the outgoing PP and overseeing manager must include a clause - “to the best of my knowledge this is a true record”.

A copy of this ‘handover checklist’ must be retained by the parish and a copy given to the overseeing manager for the dioceses’/Province records.

Handover Signatories Format

Designation/Role	Name	Signature
Team member: Outgoing PP		
Team member: Outgoing PP		
Team member: Incoming PP		
Team member: Incoming PP		
Outgoing PP		
Incoming PP		
Appointed Overseeing Manager		
Date		

2. Executive Summary – Handing over document

The executive summary of the handover report will cover the points mentioned below in brief and will not exceed 2 pages.

- Introduction: (1) Includes a parish profile along with a few lines on the content and how to read the document. (2) General information and areas needing special attention.
- Parish Profile: (1) Brief parish history (2) Number of families: (3) Number of Ethnic Groups with approx. % (4) Geographical area (5) Number of Zones (6) Shrines (7) Religious Institutions (8) Schools, Educational and Training Institutions (9) Parish Groups, Associations and Ministries)
- Overall, Parish Handover Review – Questions & Comments for each point.
 1. Canon Law: Is the Parish following the Code of Canon Law? - Book II - Part II. (CC 515 - 572) Verification details given in: Part1-Point 10.
 2. Parish Councils: Are the parish councils (Pastoral and Finance) functioning as per the diocese norms. Are laity council members contributing in line with their responsibilities?
 3. Pastoral Plan: Has the pastoral plan been prepared (using a survey format approved by the diocese) and implemented? Has goal achievement and progress been measured?
 4. Sacraments and Sacramentals: Do the celebrations and dispensations meet the needs of the community.
 5. Parishioners: Are the needs of the different ethnic groups met to their satisfaction?
 6. Ministries: Are there enough ministries to meet the needs of the parish? And are they functioning satisfactorily?
 7. Parish Calendar: Does the Parish calendar reflect the goals in the pastoral plan? What is the measure of vibrancy of the parish as ascertained from the execution of the parish calendar?
 8. Finance: Have the following documents (1) Annual Capital and Operating Budget, (2) Financial Records and Reporting, (3) Strategic Planning, and (4) Internal Controls, been checked and in order? Specify improvements and irregularities if any.
 9. Fundraising: Have all fund-raising avenues been checked for continuity? Specify improvements and irregularities if any.
 10. Trusts: Are all trust papers in order and up to date? Specify improvements and irregularities if any.
 11. Administration: Are the administration documents in order? Are there any anomalies or trends observed based on past history?

12. Inventory: Are the inventory statements comprehensive and inclusive? The condition and details of the items should be mentioned where necessary. (Example: Antique and gold plated items, etc.)
13. Property: Are all property papers in order? Have any additional constructions been carried out? Have these been recorded and registered?
14. Maintenance: Have all maintenance parameters been checked? Were there any high expenditure items executed (specify). Is any future expenditure planned? Are purchase/vendor selection and tender norms being followed?
15. Legal: Have all legal issues been recorded and case status been explained for smooth transition?

3. Parish Handover – Takeover Checklist Elements

These are basic recommendations put together from multiple sources. The list can be modified to suit specific local needs. Below are some key elements.

General Documents

Document	Format Reference
1. Parish Vibrancy Outlook	Part 1
2. Parish Pastoral Plan	Part 2– Point 4
3. Parish Calendar	Part 3– Point 5
4. Parish Ministries and Groups (Sample list) <ul style="list-style-type: none"> • <i>Parish Zones</i> • <i>Youth</i> • <i>Women’s Group</i> • <i>Women Religious (Participation)</i> • <i>SVP</i> • <i>SSSS</i> • <i>SCC</i> • <i>Sr Citizens</i> • <i>Prison Ministry</i> • <i>Prayer Group</i> • <i>Orphanages, Destitute and others</i> • <i>Men Religious (Participation)</i> • <i>Legion of Mary</i> • <i>Inter-Religious</i> • <i>Family Apostolate</i> • <i>Ecumenism</i> 	Part 3– Point 6

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<ul style="list-style-type: none"> • <i>Catechetics</i> 	
5. Parish Councils	Part 3– Point 7
6. Other Important Functions <ul style="list-style-type: none"> • <i>Employee Records</i> • <i>Training Records</i> • <i>Aid Disbursement</i> • <i>Redressal Forums</i> 	Part 3– Point 8
7. Important Persons	Part 3– Point 9
8. Administration <ul style="list-style-type: none"> • <i>Accounts and Finance</i> • <i>Fund Raising</i> • <i>Property Management and Maintenance</i> • <i>Trusts</i> • <i>Contractors and suppliers</i> • <i>Contracts and contractual obligations</i> • <i>Inventory</i> • <i>Security</i> • <i>School</i> • <i>Cemetery</i> • <i>Chapel/Shrine</i> • <i>Permanent and temporary Staff</i> • <i>Advisors, Liaison Connects, etc.</i> • <i>Website – Updating and Maintenance</i> • <i>Policies: Child Protection, HR, Employment, Purchase, venue rental, etc.</i> • <i>Safety and Safety records – Fire and health safety</i> • <i>Complaints and ongoing concerns.</i> 	Part 4- Point 10

Space for Reference Notes

Part 2 - Planning

4. Parish Vibrancy Outlook

The “Parish Vibrancy Outlook” (PVO) is a tool that a parish priest may use to ascertain the pulse of the parish and how the parishioners view the functioning. This will help in initiating course corrections where necessary and also working on changing incorrect perceptions that may have developed. PVO surveys may be carried out once a year and the reports together with planned actions may be recorded. These documents will be most useful for the incoming parish priest. A survey may also be carried out at the time of handover to enable the incoming parish priest to understand the psyche of the parishioners and plan how to take things forward. A sample PVO questionnaire (which may be modified to suit local parish needs) is given below.

Ascertaining the pulse of a parish is essential to plan for progress and growth. This is an activity that can be carried out once a year (A system of annual reviews) and can be given to the new parish priest who is taking charge. Details shared are suggestive and may be redesigned by local dioceses and parishes.

Key Areas to measure the vibrancy of a Catholic parish.

1. **Sacraments and sacramentals:** The number of people who attend Mass regularly can be an indicator of the vibrancy of the parish. This is besides the preparation and engagement for other celebrations.
 - Mass: Attendance, participation, homily, celebration sanctity and relevance to local customs
 - Attendance at special liturgical events (e.g., Holy Week, Christmas, Easter)
 - Percentage of registered parishioners who attend Mass regularly.
2. **Involvement in parish activities:** The level of participation of the parishioners in various activities organized by the parish, such as Bible study groups, prayer meetings, youth groups, and volunteer opportunities, can be another indicator.
 - Number and diversity of parish activities offered (e.g. Bible study groups, prayer groups, service projects, social events).
 - Percentage of registered parishioners involved in at least one activity
 - Level of volunteerism within the parish community (e.g. serving as lectors, Eucharistic ministers, or hospitality ministers).

3. **Community outreach:** The level of engagement of the parish in outreach programs to serve the wider community, such as social justice initiatives, food drives, and support for the marginalized, can be a sign of a vibrant parish.
 - Number and diversity of outreach programs offered (e.g. food drives, shelter programs, support for refugees or the homeless)
 - Percentage of registered parishioners involved in at least one outreach program.
 - Collaboration with other community organizations to address social justice issues.
4. **Sacramental celebrations:** The frequency and enthusiasm with which the sacraments are celebrated, such as baptism, confirmation, weddings, and funerals, can also be a measure of the vibrancy of the parish.
 - Frequency and diversity of sacramental celebrations offered (e.g., baptisms, confirmations, weddings, funerals)
 - Participation of registered parishioners in sacramental celebrations
 - Efforts to engage and involve young people in sacramental preparation.
5. **Parish leadership:** The quality of leadership provided by the parish priests, deacons, and lay leaders, as well as the level of collaboration and communication among them, can be a significant factor in the vibrancy of the parish.
 - Quality of preaching and teaching by parish priests and deacons
 - Collaboration and communication among parish leadership (e.g. priests, deacons, pastoral staff, parish council)
 - Opportunities for parishioner feedback and input in decision-making processes

Additional explanation for survey participants. *Brief to be used by persons administering questionnaires*

1. **Sanctification:** The sacrament should be a means of sanctifying or making holy the recipient, imparting the grace of God to them.
2. **Validity:** The sacrament should be performed according to the proper form, matter, and intention, as established by the Church.
3. **Efficacy:** The sacrament should have a real and positive effect on the life of the recipient, providing them with spiritual strength and assistance. It should be celebrated with due respect.
4. **Participation:** The laity should be actively engaged in the sacramental life of the Church, and the sacraments should be celebrated in a way that encourages and facilitates their participation.

5. **Relevance:** The sacraments should be meaningful and relevant to the lives of the faithful, helping them to grow in faith and deepen their relationship with God.
6. **Evangelization:** The sacraments should be a means of evangelization, inviting non-believers or those who have fallen away from the faith to encounter Christ and join the Church.
7. **Unity:** The sacraments should be a source of unity for the Church, bringing together people of different backgrounds and experiences in a common encounter with Christ.
8. **Renewal:** The sacraments should be a means of ongoing spiritual renewal for the faithful, helping them to deepen their commitment to Christ and to live more fully the Christian life.
9. **Discernment:** The sacraments should be celebrated with discernment and pastoral sensitivity, taking into account the individual needs and circumstances of the recipient.
10. **Community:** The sacraments should be celebrated in the context of a vibrant and supportive Christian community, providing opportunities for mutual support and encouragement among the faithful.

Measuring the Vibrancy

This can be carried out through a survey of parishioners. The survey should cover all zones, and the diverse ethnic groups. Sample survey questions are given below. These can be modified, and additions can be made depending on the unique needs of specific parishes.

Parish Vibrancy Outlook Measurement questionnaire:

Please use the scales below to tick the relevant answers:

- **Frequency:** (A) Always; (O) Often; (S) Sometimes (R) Rarely (N) Never -- (A)(O)(S)(R)(N)
- **Appreciation:** (E) Excellent; (G) Good; (M) Moderate; (I) Improvement Required -- (E) (G) (M) (I)
- **Satisfaction/Importance/Engagement:** 5= Very Well 4= Well 3= Moderately 2=Partially 1=Not at all.

I. Sacraments and sacramentals - How would you rate the following celebrations?	
1. Mass	(E) (G) (M) (I)
2. First Holy Communion	(E) (G) (M) (I)
3. Confirmation	(E) (G) (M) (I)
4. Marriage	(E) (G) (M) (I)
5. Baptism	(E) (G) (M) (I)
6. Reconciliation	(E) (G) (M) (I)
7. Anointing of the sick	(E) (G) (M) (I)
<i>(Please refer to the table above "Additional Note: Effectiveness of sacraments" before answering)</i>	
II. Involvement in parish activities	
1. Have you participated in any parish activities in the past year?	(YES) (NO)
2. How satisfied are you with the range of parish activities offered?	1, 2, 3, 4, 5
3. Do you feel that there are enough opportunities for parishioners to get involved?	1, 2, 3, 4, 5
4. Are you satisfied with how parish activities are conducted?	1, 2, 3, 4, 5
5.	
III. Community outreach	
1. Have you participated in any parish community outreach programs organized last year?	(YES) (NO)
2. Are you content with the outreach activities initiated by the parish?	1, 2, 3, 4, 5
3. How satisfied are you with the parish's efforts to address social and ethnic needs?	1, 2, 3, 4, 5
4.	
5.	
IV. Sacramental celebrations	
1. Are you satisfied with the parish calendar for sacramental celebrations (frequency)?	(YES) (NO)
2. How satisfied are you with the way novenas and feast days are celebrated?	1, 2, 3, 4, 5
3. Are you satisfied with the parish sacramental celebrations that meet ethnic group needs?	1, 2, 3, 4, 5
4. How well are sacramental celebrations aligned to local customs and needs?	1, 2, 3, 4, 5
5. Do you feel that sacramental preparation programs are adequate and engaging?	(YES) (NO)

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V. Parish leadership – How would you rate	
1. The quality of the homily at different sacramental celebrations?	1, 2, 3, 4, 5
2. The communication between the parish leadership and the community?	1, 2, 3, 4, 5
3. The opportunities for parishioner feedback and input in decision-making processes?	1, 2, 3, 4, 5
4. The willingness of the parish leadership to address the community needs?	1, 2, 3, 4, 5
VI. Parish community	
1. How connected do you feel to the parish community?	1, 2, 3, 4, 5
2. How welcome and accepted do you feel at this parish?	1, 2, 3, 4, 5
3. How satisfied are you with the level of pastoral care and support offered by the parish?	1, 2, 3, 4, 5
4. Are you satisfied with the community bonding activities carried out by the parish?	1, 2, 3, 4, 5
VII. Religious education and formation – Are you satisfied with	
1. The quality of religious education and formation programs offered by the parish?	1, 2, 3, 4, 5
2. The faith formation programs for children offered by the parish?	1, 2, 3, 4, 5
3. The adult faith formation programs offered by the parish?	1, 2, 3, 4, 5
4. The formation of lay leaders in the parish?	1, 2, 3, 4, 5
VIII. Technology and communication	
1. Does the parish use technology and social media to communicate with the community?	1, 2, 3, 4, 5
2. How easy is it for you to access information about parish activities and events?	1, 2, 3, 4, 5
3. How satisfied are you with the overall communication from the parish to the community?	1, 2, 3, 4, 5
4. How well is the parish website designed to meet the needs of the community?	1, 2, 3, 4, 5
IX. Stewardship – How well is the parish leadership ...	
1. Managing resources (e.g., finances, facilities, human resources)?	1, 2, 3, 4, 5

A Synodal Approach to Parish Administration

2. Managing the parish dealings in a transparent and accountable manner?	1, 2, 3, 4, 5
3. Engaging lay members in the parish's stewardship efforts?	1, 2, 3, 4, 5
4. Ensuring that parishioners feel welcome?	1, 2, 3, 4, 5
X. Evangelization and outreach – How well does the parish leadership	
1. Engage in evangelization and outreach to the wider community?	1, 2, 3, 4, 5
2. Work and put in efforts to welcome and reach out to new members?	1, 2, 3, 4, 5
3. Prepare, equip and empower lay persons to share the faith with others?	1, 2, 3, 4, 5

XI. How do you rate the following ministry functioning in your parish

- Scale: (4) Excellent; (3) Good; (2) Moderate; (1) Improvement Required; (X) Not Applicable; (NE) Non-Existent

<i>Ministry & Apostolates</i>	<i>Rating</i>	<i>Comments</i>
1. <i>Youth</i>	4 3 2 1 X (NE)	
2. <i>Women's Group</i>	4 3 2 1 X (NE)	
3. <i>Women Religious (Participation)</i>	4 3 2 1 X (NE)	
4. <i>SVP</i>	4 3 2 1 X (NE)	
5. <i>SSSS</i>	4 3 2 1 X (NE)	
6. <i>SCC</i>	4 3 2 1 X (NE)	
7. <i>Sr Citizens</i>	4 3 2 1 X (NE)	
8. <i>Prison Ministry</i>	4 3 2 1 X (NE)	
9. <i>Prayer Group</i>	4 3 2 1 X (NE)	
10. <i>Orphanages/ Destitute/ +</i>	4 3 2 1 X (NE)	
11. <i>Men Religious (Participation)</i>	4 3 2 1 X (NE)	
12. <i>Legion of Mary</i>	4 3 2 1 X (NE)	
13. <i>Inter-Religious</i>	4 3 2 1 X (NE)	
14. <i>Family Apostolate</i>	4 3 2 1 X (NE)	
15. <i>Ecumenism</i>	4 3 2 1 X (NE)	
16. <i>Catechetics</i>	4 3 2 1 X (NE)	

*Additional apostolates may be added as required.
Any other comments and suggestions*

XII. Respondent Details

Parish Name:
Your Age – <i>Please circle only one: (12-17); 18-25); (26-35); (36-50); (51-65); (66+)</i>
Education - Please tick: 1. Less than high school () 2. High school diploma () 3. Some college () 4. Undergraduate degree () 5. Post graduate degree ()
Ethnicity - Please tick: 1. Maharashtrian Origin () 2. Tamil () 3. Goan () 4. Mangalorean () 5. Telugu () 6. Malayalee () 7. Anglo Indian () 8. Other _____
Gender Please tick: 1. Male () 2. Female () 3. Other ()
Optional: Name: _____ Phone Number: _____ E-mail: _____

Thank you for completing this survey.

5. Parish Pastoral Plan (Details: Part 5: O & E point 1)
Sample Contents: 1. Introduction, History of the Parish, Basis of the Pastoral Plan 2. The Four Vibrant Indicators 3. Phases Involved in Developing the Pastoral Plan 4. Survey process and Findings 5. Outcomes of Deliberations for Action (Focus Areas & Goals: Worship, Community, Service, Education/Formation) 6. Conclusion 7. Appendix (Details provided: Survey Questionnaire, Pastoral Planning Process and Survey Analysis, Action Plan)

Space for Reference Notes

Part 3 - Operations

6. Parish Calendar and Parish Diary *(Details: Part 5: O & E point 2)*

Parish Calendar

Besides the regular mass schedules (Sunday mass, Weekday mass, Zone mass, Baptisms, Reconciliation, Rosary, etc.) and special announcements, the parish calendar should include major parish events like (1) Feasts, (2) Novenas, (3) Ministry and Community Events, (4) Christmas, (5) Easter, (6) First Holy Communion (7) Confirmation. Each event should have details of the following:

- Organizing committee members (Names and contact details)
- Arrangements to be made.
- Budgets and actual expenditure details
- Donors
- Special requirements to be made.

Parish Diary Details

The parish diary details should include (1) Family visits (2) Funerals (3) Visit to sick (4) Communion to the Sick (5) Marriages (6) Counselling (7) Emergency meetings (8) Others.

7. Parish Ministries and Groups

Parish Council and Finance Council

- Members and contacts
- Meeting frequency
- Minutes of Meetings/Files/Books maintained.
- Major decisions in the last 12 months
- Constitution

Zones (Make a separate document for each zone)

- Zone Name:
- Leaders and contacts details
- Number of families:
- Meetings: Meeting minutes/files/books
- General Activities, Special Needs, and events
- Budgets allocated and expenses.

Youth (Separate details if more than one group)

- Group Name:
- Leaders and committee names and contacts

Choir (Separate details if more than one choir)

- Choir Name:
- Leaders and member names and contacts

<ul style="list-style-type: none"> • Number of Youth: Male () Female () • Meetings: Meeting minutes/files/books • General Activities, Special Needs, and events • Budgets allocated and expenses. 	<ul style="list-style-type: none"> • Musical instruments used • Practice format • General Activities, Special Needs, and events • Budgets allocated and expenses
<p>SSVP</p> <ul style="list-style-type: none"> • Leaders and committee names and contacts • Adopted families, fringe families and others. • Meetings: Meeting minutes/files/books • General Activities, Special projects, and events • Budgets allocated and expenses. • Plans and books maintained. 	<p>Other Groups (similar details as above)</p> <p>(1) Self Help Group (SHG) (2) Legion of Mary (3) Sunday School Prayer Group (4) Liturgy Group (5) Senior Citizen Group (6) Small Christian Community (7) Women’s Group (8) Altar Servers (9) Burial (10) Outreach</p>
<p>Note: Each of the above documents must be written by laity and clergy members and approved by the PP.</p>	

<p>8. Parish Pastoral Council and Finance Council</p>
<p>The parish pastoral members need to follow the constitution and norms laid down by the diocese. The tenure contribution and competence (individual and group assessment) would need to be shared with the incoming PP. The councils need to follow the meeting protocols: Scheduling of Meetings, Use of Agendas and Review Materials, Recording of Meeting Minutes, Confidentiality, Record Retention</p> <p>Parish Pastoral Council They need to be, prayerful, pastoral, representative, discerning, responsive and enabling. Parish Councils have a responsibility to foster pastoral activity in the parish; they advise and assist the pastor, are the representative body that reflects the makeup of the parish. The assessment would be helpful to the incoming PP.</p> <p>Parish Finance Council Responsibilities include: (1) Annual Capital and Operating Budget, (2) Financial Records and Reporting, (3) Strategic Planning, (4) Internal Controls. All activities related to the 4 areas mentioned should be reflected in the takeover document.</p>

The table below can be used for both the Finance and Pastoral Council
(confidential)

Name	Tenure Completed	Contribution Assessment	Competence Assessment	Comments

9. Other Important Functions

A: Sunday School; B: Employee Details; C: Training Records; D: Aid Disbursement;
E: Redressal Forums at the Parochial Level

A: Sunday School

1. Teachers (Qualified/Unqualified) + Details of each person
2. Children (grouped by standards and Ethnic backgrounds)
3. Formation Calendar of events
4. Syllabus followed.

B: Employee Details

1. Application, Resume and References
2. Appointment letter and salary structure
3. Job description
4. Background check and Personal details
5. Salary structure

C: Training Records (Basic and Ongoing)

Records and details of each group and individuals

1. Parish Pastoral and Finance Council
2. Area Leaders
3. Sunday School Teachers
4. Eucharistic ministers
5. Ministry Leaders and other leaders

D: Aid Disbursement (Process and Records)

1. Aid Sanctioning Guidelines.
2. Aid Request Validation and authorization process
3. Applicant Enquiry and reference Process
4. Aid Application Form
5. Aid Disbursement Records

E: Redressal Forums at the Parochial Level
Redressal forum committee member names and details for each of the issue areas below must be provided.
1. Between Parishioners
2. Between Parishioners and Members in Parish Bodies (Area Leaders, Council members, Employees, Sunday School Teachers, Youth, SVP, Eucharistic Ministers etc.)
3. Between Members in Parish Bodies
4. Between Parishioners / Members of Bodies / Employees and the Parish Priest
5. Between Parish Clergy themselves

10. Important Persons in Parish Area (Influencers and Advisors)
1. Politicians and active political groups
2. Corporators
3. Local Government body Heads
4. School and other institution heads
5. Local religious groups and heads
6. Local ecumenical colleagues
7. People needing special attention (confidential)
8. Advisors: Legal, financial, public relations, etc., ((Part 5: O & E point 10)

Space for Reference Notes

Part 4 - Administration

11. Administrative and other areas <i>(Details: Part 5: O & E point 3-9)</i>	
(1) Accounts and Finance	(6) Security
(2) Property and Property Maintenance	(7) School
(3) Trusts	(8) Cemetery
(4) Contractors and suppliers	(9) Chapel/Shrine
(5) Inventory	(10) Permanent and temporary staff
Note: Each of the above documents must be written by laity and clergy members and approved by the PP	

12. Individual Document Authorization - Parish Handover - Takeover document		
Additional and special overall comments:		
Parish Priest (Handing Over)	Parish Priest (Taking Over)	Other Transfer Team Members (Appointed by Bishop)
Laity Members involved in Ministries and other groups mentioned in the handover-takeover report sections above.		
Vicar General or another Appointee by Bishop		
Note: <ul style="list-style-type: none"> Format to be used for all sections of the documents prepared. (e.g., Finance, legal, trusts, administration, etc.) Additional comments may be given below each format or prior to the authorization table. Any special and confidential briefings may be given on separate sheets. One copy to be sent to Bishop's Office and one copy to be maintained for Parish reference 		

13. Parish: Code of Canon Law – Book II Part II (Cann: 515-572)
Reference for verification of compliance

PARISHES, PASTORS, AND PAROCHIAL VICARS CC 515 - 552		VICARS FORANE CC 553 - 555	
Parishes:	Can 515	Vicars Forane	Can 553
Quasi-Parishes / Other communities:	Can 516	Qualifications / Term of Office /	Can 554
Team Ministry:	Can 517	Removal of Vicar Forane	Can 554
Types of Parishes:	Can 518	Powers, Duties, Rights of Vicar Forane	Can 555
Pastors:	Can 519	RECTORS OF CHURCHES CC 556 - 563	
Parish Entrusted to Religious	Can 520	Rectors of Churches	Can 556
Qualifications for Pastors	Can 521	Appointment of Rectors	Can 557
Term of Office for Pastors	Can 522	Rights of Rectors	Can 558
Assignment of Pastor	Can 523	Liturgical Celebrations by Rector	Can 559
Suitability of Pastor	Can 524	Extended Services of Rector	Can 560
Pastoral Appointments - Impeded / Vacant Diocese	Can 525	Permission of Rector	Can 561
One Pastor only	Can 526	Duties of Rector	Can 562
Installation of Pastor	Can 527	Removal of Rector	Can 563
The Pastor as Teacher & sanctifier	Can 528	CHAPLAINS CC 564 - 572	
Pastoral Obligations: Governance	Can 529	Description of Chaplains	Can 564
Functions of the Parish Priest	Can 530	Appointment of Chaplains	Can 565
Stole Fees	Can 531	Faculties of Chaplain	Can 566
Juridic Representation of the Parish	Can 532	Chaplain of Lay Religious	Can 567
Residency, Vacation, and Absence of Pastors	Can 533	Chaplains of Migrants	Can 568
Mass for the People	Can 534	Military Chaplains	Can 569
Parish Registers	Can 535	Chaplain of a Non-Parochial Church	Can 570
Parish Councils	Can 536	Chaplains Relation to Local Pastor	Can 571
Parish Finance Council	Can 537	Removal of Chaplain	Can 572

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Cessation from Pastoral Office & Retirement	Can 538	
Impeded or Vacant Parish	Can 539	
Parochial Administrator	Can 540	
Parish Vacancy / Pastor Impeded;	Can 541	
Interim Governance	Can 541	
Qualifications of Team Members	Can 542	
Functions and Duties of Team Members	Can 543	
Team Ministry Vacancy	Can 544	
Ordination Required for Parochial Vicar	Can 546	
Appointment of Parochial Vicar	Can 547	
Rights and obligations of the Parochial Vicar	Can 548	
Parochial Vicar as substitute	Can 549	
Residency of Parochial Vicar	Can 550	
Voluntary Offering / Stole Fees	Can 551	
Removal of Parochial Vicar	Can 552	

14. Sample Handover and Takeover documents in use today

(Part 5: O & E point 11 & 12)

- a. Sample - Diocese: Parish Priest Handover Document
- b. Sample - Religious: Parish Priest Handover Document

Space for Reference Notes

Part 5 – Annexures: Outlines and Examples

Annexure 1: Pastoral Plan

SAMPLE-1: St. Anthony’s Parish - Poona Diocese Pastoral Plan (Goals)

(Full plan is available with St. Anthony’s Parish – Model Colony Poona Diocese)

Goals

WORSHIP

Celebration of the Liturgy

- Improve infrastructure for better ambience and participation
- Form Animator groups for Mass Animation
- Formation of Animation Teams
- Animation

Celebration of the Sacraments

- Sacrament of Reconciliation - Individual celebration & Communal Celebration
- Sacrament of Anointing - Individual celebration & Communal Celebration
- Sacraments of Eucharist & Confirmation - Attend Sunday School with parents
- Devotions – Rosary; 1st Friday Devotion; Stations of the Cross – English & Marathi

Spiritual Growth Programs

- Spiritual Formation - Parish Mission; Marriage Encounter / BFI / C4C / Prayer Group meetings; etc.

COMMUNITY

Small Christian Communities

- Divide into Neighborhoods of 7 to 10 Families - One Priest for four SSC Areas
- Priest will visit all the families in a Neighborhood and celebrate Mass or a planned activity
- Each Neighborhood will Conduct the Rosary during the months of May and October
- Each Neighborhood will conduct the Stations of the Cross in their respective Groups

Hospitality

- Organizing fellowship Programs: (1) Valentine’s Day couples (2) Grandparents Day (3) Children’s day (4) Youth Festival (5) Differently abled (6) For each ethnic group (Onam, Monti Fest, etc.)

Stewardship

- Governance - Church Goods: Maintain properties and facilities; Pay just wages; Prepare budget (transparent)

Evangelization

- Prepare groups for Evangelization: Reach out to unchurched, alienated, non-practicing and marginal Catholics; Invite others to religious services

Ecumenism

- Interfaith communion: Organize interfaith dialogue or worship service

Inter-religious Dialogue

- Prepare groups for Evangelization: Organize interfaith dialogue; participate in justice, peace & social causes

SERVICE

Within the Parish

- Reaching out to the Aged & Sick: Eucharistic Visitation
- Reaching out to Poor & needy: Material Needs; Educational Assistance; Medical Assistance
- Assisting the Poor to avail of Govt Schemes: Identify the Needs; Prepare & Submit Documents; Follow up

Local Community

- Reaching out to Neighbors of all Faiths: Organize Blood Donation Camps; Visit Nursing Homes & Hospitals

EDUCATION AND FORMATION

Sunday School

- For School going children: Systematic Catechetical Formation
- For those who have not received the Sacraments: Identify & invite persons to receive the Sacraments
- Sunday School Teachers: Ongoing Formation

Adult Education

- Pastoral and Spiritual Formation: Prepare List of Formation Programs - Resource Persons

Youth

- Promotion of Youth: Identify different types of Youth; Arrange Meeting to draw up Program
- Youth animators: Identify Youth animators; Professional Training for Animators

SAMPLE 2: St. Francis of Assisi Parish Pastoral Plan (Goals) - Michigan

<https://www.stfrancisa2.com/wp-content/uploads/2016/08/ParishPastoralPlan2015-2020.pdf> (Full Plan)

WELCOME and HOSPITALITY

Goal #1: Encourage our parish community to embrace the joy of hospitality and generosity of welcome towards all who come to our community.

Goal #2: Ensure that all who register with our community are fully informed of all of the ministries and activities available within the parish.

MUSIC and LITURGY

Goal #1: Expand and continually evaluate the active involvement of the faith community in our music ministry.

Goal #2: Foster a sense of community within the music ministry.

Goal #3: Welcome and train all who are interested in being commissioned as Altar Assistants.

Goal #4: Assist in the planning and organization of liturgical events.

Goal #5: Using the seasons and feast days of the liturgical year to enhance the aesthetics of the church and parish campus.

ST. FRANCIS SCHOOL

Goal #1: Demonstrate a welcoming spirit to all who seek a Catholic education for their children.

Goal #2: Provide an academically excellent curriculum which will prepare students for high school and beyond.

Goal #3: Partner with staff, parents, and parish ministries to fulfill the mission of the school.

Goal #4: Strive to maintain and make facility improvements for the betterment of the school functions and operations.

YOUNG ADULT MINISTRY

Goal #1: Develop a young adult program based on a positive Christian environment.

Goal #2: Foster young adults' desire to learn more about Jesus and the Catholic faith.

Goal #3: Support young adults' openness to God by honoring, nourishing, and supporting the work of the Holy Spirit in their lives and within their relationships.

Goal #4: Empower and equip young adults to a more active participation in the life, mission, and work of the Church.

OUTREACH, SERVICE and JUSTICE

Goal #1: Give practical help, support, and friendship to those in need.

Goal #2: Develop Christian service opportunities and training for social ministry volunteers of all ages.

ADMINISTRATION AND OPERATIONS

Goal #1: Demonstrate accountability based on sound financial practices and be forthright in all business affairs.

Goal #2: Examine and evaluate physical facilities of our parish campus.

Goal #3: Practice good stewardship of resources.

Goal #4: Prepare for anticipated transition in Administration and Operations.

STEWARDSHIP and DEVELOPMENT

Goal #1: Plan and undertake parish stewardship efforts to care, tend for, and build up our faith, our parish family, and our community while responding to the call of evangelization, intentional discipleship, and stewardship.

Goal #2: Broaden and grow the Development Committee’s financial resources in support of St. Francis School.

COMMUNICATIONS and TECHNOLOGY

Goal #1: Review the video and audio needs in all parish facilities.

Goal #2: Review and update the parish website and explore social media options for expanded communication.

Goal #3: Update and create software and technological means for better and more efficient communication for the ease of carrying out the parish mission.

Goal #4: Update and enhance the current signage around the parish campus

Annexure 2: Parish Calendar

The parish calendar which includes the daily agenda, the weekly activities and yearly plan is an extremely useful document for the incumbent parish priest to get a grip of how the parish has been run in the past years. It will also give an indication of the vibrancy of the parish. A sample is given below.

<https://www.stbernadettechurchhouma.com/annual-parish-calendar>

St Bernadette Annual Calendar

Today: 27 Feb – 5 Mar 2023

Print Week Month Agenda

	Mon 27/2	Tue 28/2	Wed 1/3	Thu 2/3	Fri 3/3	Sat 4/3	Sun 5/3
01:00							
02:00							
03:00							
04:00							
05:00							
06:00							
06:30 – 07:30	Mass	Mass	Mass	Mass	Mass		
07:00							07:00 – 08:00 Mass
08:00		08:15 – 09:15 SBS Mass				07:30 – 08:30 1st Saturday Devotional - C	
09:00			09:00 – 11:00 CSI Group HPX/HH			08:30 – 11:00 1st Eucharist Retreat	09:00 – 10:00 SBS Mass
10:00			10:00 – Mass and Liturgy				
11:00							11:00 – 11:00 K/1st gr Mass Class M

St Bernadette Annual Calendar	
Today	Monday, 27 February
Monday, 27 February	
06:30	Mass
18:00	Inquiry ST/MJ
18:00	YF Elementary School
18:00	Mass
Tuesday, 28 February	
06:30	Mass
08:15	SBS Mass
16:00	Rosary - C
18:00	Mass
18:30	K/C Initiation YC
18:45	Sisters in Christ - MJ
Wednesday, 1 March	
06:30	Mass
09:00	CSH Group FPC/HH
10:00	Mass at Heritage Manor
18:00	Mass
19:00	Mercy Night Church

- **Liturgical seasons:** Advent, Christmas, Lent, Holy Week, and Easter:
- **Regular Masses:** Daily Masses, Sunday Masses, special Masses on Holy Days of Obligation.
- **Sacramental preparation:** Preparation classes - baptism, confirmation, first communion, and marriage.
- **Feast days:** Feast days of the Church's patron saints or other important religious figures:
- **Special events:** Retreats, pilgrimages, missions, and guest speakers.
- **Community events:** Outreach, such as festivals, picnics, fundraisers, and service projects.
- **Religious education:** For children and adults - Bible studies, catechism, and youth group activities.
- **Pastoral council meetings:** Parish's pastoral council

St Bernadette Church Annual Calendar									
Today) < > July 2023 ▾	Print			Week	Month	Agenda ▾			
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
26	27	28	29	30	1 Jul	2	3	4	5
06:30 Mass 18:00 Mass	06:30 Mass 16:00 Rosary - C 18:00 Mass +2 more	06:30 Mass 10:00 Mass at Herita 18:00 Mass	06:30 Mass 18:00 Mass 18:45 Breaking open 19:00 Young Adult Vc	06:30 Mass	07:30 1st Saturday C 16:00 Mass	07:00 Mass 09:00 Mass 11:00 Mass +3 more			
6	7	8	9	10	11	12	13	14	15
06:30 Mass 18:00 Mass	CHURCH OFFICE C 06:30 Mass 16:00 Rosary - C +2 more	06:30 Mass 10:00 Mass at Herita 18:00 Mass	06:30 Mass 18:00 Mass 18:45 Breaking open	Garage Sale setup 06:30 Mass	16:00 Mass	07:00 Mass 09:00 Mass 11:00 Mass 17:30 Mass			
16	17	18	19	20	21	22	23	24	25
06:30 Mass 13:00 Garage sale cc 18:00 Mass	06:30 Mass 13:00 Garage sale cc 16:00 Rosary - C +2 more	06:30 Mass 10:00 Mass at Herita 18:00 Mass	06:30 Mass 13:00 Garage sale cc 18:00 Mass 18:45 Breaking open	06:30 Mass 13:00 Garage sale cc 18:00 Mass +2 more	06:30 Mass 13:00 Garage sale cc 09:00 Garage Sale	08:00 Garage Sale C 16:00 Mass	07:00 Mass 09:00 Mass 11:00 Mass 17:30 Mass		
24	25	26	27	28	29	30			
Waxing floors in FPC/HH									
06:30 Mass	06:30 Mass	06:30 Mass	06:30 Mass	06:30 Mass	16:00 Mass	07:00 Mass			

Annexure 3: Finance Report

Date of Visit	
Name of Parish	
Place	
Sub- Station	
Incoming Priest	
Outgoing Priest	

1. Cash Book maintained	
a. Maintained or Not Maintained	
b. From dated	
2. Supporting Documents/ Payment Vouchers	
a. Maintained or Not Maintained	
b. Tally Software	
3. Salary Register	
a. Maintained/Not Maintained	
b. Part of General Vouchers	
4. Mass Books and Official Mass Diary	
5. Cumulative Masses	
6. Binaton/ Trination Masses	
7. Sunday & Offertory Collections books	

a. Cash Counted By	
b. Cash Counted On	
c. Records	
d. Till the Counting the Keys are with	
e. Documentation of Collection	
8. Dumb Box Collection Books	
a. Cash Counted By	
b. Cash Counted On	
c. Records	
d. Till the Counting the Keys are with	
e. Documentation of Collection	
9. Receipts for Collections	
a. Subscriptions	
b. Mass Booking Receipt books	
c. Separate receipts Books for Any Certificates	
d. Donations Receipts Books Maintained	
10. Stall Article	
a. Receipt Books	
11. Files	
A. Property Documents	
a. Copies of Title deeds Record of Rights	
b. Photocopy of the records	
B. Bank Statement file	
a. Bank Passbooks	
b. A Separate File for the same	
c. Any Other Information	
d. Bank Correspondence file	
C. Financial Returns and audit reports	
a. Maintained/Not Maintained	
b. Separate file is Maintained	
D. Accounts Audited statements	
a. A Separate File for the same	
E. Taxes	
a. Bills, Notice, Receipts	
b. A Separate File for the same	
F. Electricity and water bills	
a. Bills, Notice, Receipts	
b. Correspondence	
c. Payment Vouchers	

G. Telephone Bills	
a. Bills, Notice, Receipts	
b. Correspondence	
c. Payment Vouchers	
H. Gas Bills	
a. Bills, Notice, Receipts	
b. Correspondence	
c. Payment Vouchers	
d. Connection in the Name of	
l. Children getting help from SSVP	
12. Inventory Register:	
A. Church and Sacristy	
a. List of Inventory	
b. Dated From	
c. Maintained as per Archdiocese Format	
d. The PP asked to handover to successor.	
B. Presbytery (PP Room, Kitchen and Guest Rooms)	
a. List of Inventory	
b. Dated From	
c. Maintained as per Archdiocese Format	
d. The PP asked to handover to successor	
13. Balances:	
A. Cash Balance	
a. Petty Cash System Followed	
b. Collection Remitted Once in	
B. Bank Balance	
a. Authorized signatories for account	
b. No of accounts	
c. Bank Name	
d. Account Number	
e. Balance as on	
C. Investments	
a. Fixed Deposit Schedule	
b. Amount	
D. Advances Paid by the Parish	
E. Staff Loan	

F. Liabilities	
G. Procure Collection to the Archdiocese	
H. Comments	
Any Special comments (By team and individual members)	

Verified and Approved

Use Authorization Format Part 4 – Point 12 to certify review.

Annexure 4: Parish Fundraising

Parish Fundraising is an important activity in running a parish. Hence it is very important that the outgoing parish priest share information in this area. Some simple information sharing points.

	Donor Type	Names	Comments
1.	Lead Donors		
2.	Planned Givers		
3.	Recurring Donors		
4.	Casual Donors		
5.	First Time Donors		
6.	Prospects		

Fundraising Campaigns that work and do not work in the parish.

(Tick mark the successful activities in the list below. Add activities that have been carried out and worked or did not work.)

• One for One	• Giving Tuesday	• Coffee Morning	• A Red-Letter Day
• Text to Give	• Festivities	• Host a show	• Bake Sale or Bake Off
• Give it Up	• Auctions	• Host a Food Event	• Movie Night
• Crowdfunding	• Stuff for Bucks	• Threads of Hope	• Church Choir Fundraising
• Peer-to-Peer Fundraising	• Pay to Play Sports Day	• Parents Night out	• Church Mission Trips

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Annexure 5: TRUST

1. General Information regarding the society

a. Address of the Trust	
b. Registration no. of Society & date	
c. Registration no. of Trust & date	
d. Type of Trust	
e. Area of operation Dist. and State	
f. Details of Property held	
• Address	
• Area	
• Whether owned/Leased	
• Custody/Location of property documents	
g. Type of Structure on Land	
• Constructed Building by	
• Purpose of Holding Land & Bldg.	
• Property taxes, (Paid/Unpaid)	
• Land taxes (Paid/Unpaid)	
• Other Taxes paid till the year	
h. Details of on-going construction	
• activities, period to complete	
• Sources of funds management	

2. Information regarding Current Trustees & their tenure:

a. Name of the Trustees and their position on the Council of the society	
(The no. of Trustees should be in odd numbers i.e. 7, 9, 11 etc. as per the constitution of the Trust) and may be for the period of 3 years (maximum) in the office.	
b. Strength of the Trustees:	
	No. Period From To

3. Statutory requirements under the provisions of various Acts and Rules:

a. Charity Commissioner’s office requirements and Returns thereon:

Details of Charity Commissioner :	
Office and Address etc.:	
Whether:	
1. A copy of Trust Deed of Trust, Memorandum of Association & Rules & Regulation of Society, Registration Certificates on record :	
2. Change Report under Schedule III Till the year filed & last report on :	
3. Change report accepted by the Commissioners’ Office up to : (Period)	
Change Report Pending &: (Period)	
Reasons for the same: (For want of)	
4. Updating of Schedule I & other :	
5. A/Cs of the Trust/soc is completed	
For the period & Audit remarks :	
• % of increase in exps. :	
• Sources of income & % increase:	
6. Action on Audit Remarks, if any :	
7. Date of Submission of Annual A/Cs	
Returns along with Form no. XC:	
Date_	
8. Any remarks from CC office on A/Cs:	
9. Budget for the year _____ submitted	
To CC office, if delayed reasons:	
Date_	
10. Pending permission of CC for sale of property u/s 22 or addition of property etc. details to furnish:	
11. Any dispute pending with CC:	

b. Compliance of the Income-tax provisions under Act and Rules:

1. Pan No. of Society/Trust & date :	
2. Tan no. of Society/Trust & date :	
3. Permission u/s 12A of IT Reg. no. :	

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4. FCRA No. & details of filing return:	
5. Service Tax No. :	
6. Minority Com Certificate no. :	
7. TDS Exemption certificate u/s Obtained & Details, if so :	
8. Any regular IT Return u/s 143 Pending, if so details of Pendency:	
9. Position of IT Returns filed on :	
10. Last TDS returns filing position :	
11. Details of filing Form no. 26Q :	
12. TDS deposited in bank up to :	
13. Date of filing Form 13 :	

c. Compliance of other requirement to authority

1. Date of filing FCRA Form no.3 To Ministry of Finance :	
2. Filing of Service Tax Returns On half yearly basis:	
3. Date of holding AGM of society :	
4. Compliance with the CA & CC :	

d. Provincial / Bishop Requirement as per the laid down procedures:

1. Submission of Monthly returns Last MR filed on	
2. Submission of Budget to Economer :	
3. Submission of Administrative Report :	
4. Contribution to xxx paid up to: Period	
5. Contribution to xxx Paid up to: Period	
6.	

e. Other details of day to day working activities:

1. How many contracts and Agreement Held and full details & income thereon:

S. No.	Name of Contractor	Nature of contract	Period of contract	Amount paid Rs.

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2. Any expired contract still to renew & Reasons for the delay, if so: _____

3. Details of Investment matured, Renewed and newly made FDs etc.: _____

S. No.	Name of Bank	Amt. Rs	Rate of Interest	Period of F.D.	Date of maturity	Maturity Amt.

4. Details of any project undertaken through others: _____

S. No.	Name of Project	Sponsored	Period	Project Amt

5. No. employees employed for the same: _____

S. No.	Name of Employee	Deputed as	Period	Net outgo

6. Liability of the society in this regard: _____

7. Strength of the employed staff and their details etc.: _____

S. No.	Name of Employee	Class & Grade	Appointed on	Salary drawn pm.

LEAVE RECORDS & PF CONTRIBUTION DETAILS

S. No.	Name of Employee	Leave position on	Availed leave for yr	Balance leave

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PF CONTRIBUTION DETAILS				
S. No.	Name of Employee	PF Contribution amt +Soc contribution	Total amt forwarded for each month	Whether listed with PF Authority or EJSF A/c

8. Maintenance of records and filing work: _____

S. No.	Name of Files	Contains	Period	No. of files

9. Weeding of the old records up to period: _____

S. No.	File name	Binding done up to	Present file maintained	Record kept in Godown

10. Any special task on hand: Please specify under table

S. No.	Name of work undertaken	Started from and complete	Present status	Source of fund

11. Annual Maintenance contract awarded for maintenance various assets details:

S. No.	Nature of asset purchased	Cash memo/Agg and date	Amount incurred	Inventory no etc & depreciated.

12. Legal matters forwarded to Bishop/Provincial: _____

S. No.	Name of the Advocate	Nature of Cases filed	Detail no of case and date of filing	Status of the case as on date

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13. Any pending legal matter with Court:

S. No.	Case no. & date of filing	Nature of Cases filed	Advocate details & fees paid	Status of the case as on date

14. Any authority filed any complaint Against society etc.:

S. No.	Filed by person/Society	Nature of Cases filed	Detail no of case and date of filing	Status of the case as on date

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Annexure 6: Administration Report

Date of Visit	
Name of Parish	
Place	
Sub- Station	
In Coming Priest	
Outgoing Priest	

1. Sacramental Register	
i. Baptism Register	
a. Maintained	
b. Number of Registers	
c. Dated From	
d. Over-writing/Whitener	
e. Over-Writing counter signed	
f. Baptism forms	
g. Affidavits are maintained	

h.	Any other information	
ii.	First Holy Communion & Confirmation	
a.	Maintained	
b.	Number of Registers	
c.	Dated From	
d.	Over-writing/Whitener	
e.	Over-writing Counter signed	
f.	Baptism certificates file	
g.	Any other information	
iii.	Marriage Triplet	
a.	Maintained	
b.	Number of Registers	
c.	Dated From	
d.	Over-writing/Whitener	
e.	Over-writing Counter signed	
f.	Marriage Papers filed	
g.	Documents Sent to the Chancellor	
h.	Documents to Registrar Marriage	
i.	Notifications Sent	
2.	Marriage Register	
i.	Maintained	
a.	Number of Registers	
b.	Dated From	
c.	Over-writing/Whitener	
d.	Over-writing Counter signed	
e.	Marriage Papers filed	
f.	Notifications Sent	
3.	Death and Burial Register	
i.	Maintained	
a.	Number of Registers	
b.	Dated from	
c.	Over-writing/Whitener	
d.	Over-writing Counter signed	
e.	Death Certificate maintained:	
f.	Burial Permit Receipt Book	
g.	Cemetery Maintenance Register	
h.	Any Other Information	
4.	Family Record Register	
a.	Status of Animarum Census	
b.	Diocese Census forms submitted	
5.	Mass Diary	

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i. Parish/Cumulative	
a. Parish Mass Diary	
b. Cumulative Mass Diary	
ii. Minutes Books:	
a. Parish Pastoral Council	
b. Parish Finance Committee	
iii. Other Books and Records:	
a. Sunday Announcements	
6. Files:	
a. Archbishop's Circulars	
b. Correspondence with Archbishop	
c. Baptisms (Pre-Baptismal Forms) :	
d. Affidavits	
e. Matrimonial Correspondence	
f. Parish Feast File :	
g. Youth	
h. Choir	
i. Prayer Groups	
j. St. Vincent de Paul Society	
k. Correspondence – Govt. Officials:	
l. General correspondence	
m. Parish Election File	
n. Altar Boys File	
o. Miscellaneous Files	
p.	
q.	

Any Special comments (By team and individual members)
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Annexure 7: Inventory Report

TO=Taken Over; HO=Handed Over (TO-0 = Take over year; Add Nos. TO+1 = Additional items in Take over year plus 1; etc.)

Item Description	Nos.: TO-0	Add Nos.: TO+1	Add Nos.: TO+2	Add Nos.: TO+3	Nos.: HO

Sample description of items

Church Items - General		
Steel chairs	Easter Candle Stand	Lecterns: Wooden / Acrylic
Wooden chairs	Ceiling fans	Small Crucifix: Metal/Wooden
Sanctuary Chairs	Pedestal fans	Focus Bulbs
Plastic chairs	Tubes	Halogen Lamps
Wooden Benches	Industrial Lights	Tabernacle
Electronic Keyboard with wooden box	Holy Water stands	Tabernacle Lamp
Kneelers	Flower stands	Main Cross in Sanctuary
Dumb Box	Frame of Our Lady of Nazareth	Large Crucifix for Veneration
P.A. system for Church: Speakers/ Mikes	Sanctuary bell	Wooden altar
P.A. system for Choir: Speakers / Mikes	Bells for Altar serving	Teapoy
Wooden Table	Stations of the Cross frames	Sprinkler
Statues: a / b / c / d / e / f / g	Hymn Books: English / Marathi	Curtains: Side Walls/ Sanctuary

Other Area Items

Sacristy Room Items	Parish Office	Parish residence & Others
Any Special comments (By team and individual members)		

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Annexure 8: Property Documents

Document availability checklist

Ownership Documents	
1. Sale Deed	2. Mutation Register Extract
3. General Power of Attorney	4. Copy of Building Plan
5. NOC, No objection certificate	6. Payment Receipts
7. Sale Agreement	8. Property Tax Receipts
9. Allotment Letter	10. Encumbrance Certificate
11. Possession Letter	12. Completion Certificate
13. Khata Certificate	14. Occupancy Certificate
Property Types, Freehold Vs. Leasehold	
Lease Document Contents Checklist	
1.	Property details, including area, location, address, structure, furniture and furnishings, if provided are mentioned in the lease deed.
2.	Lease duration, its validity and provision for its renewal, along with the terms and conditions for renewal of lease deed.
3.	Rent, maintenance, security deposit to be paid by the tenant and the due date. Other important provisions, such as interest and penalty on payment delay, should also be mentioned. It should also mention the details of payment to be made by the tenant on a monthly basis, such as electricity charges, water bills or any other utility costs.
4.	Clauses for lease termination should be mentioned in the lease deed, along with other reasons for which the agreement can be cancelled, such as breach of deed, use of property for illegal activities, or failure to pay rent.

Lease & Rent Agreement Clauses Verification Checklist

Particulars	Lease	Rent
Type of contract	Lease	Leave and license
Parties	Lessor and lessee	Landlord and tenant
Payment	Monthly	Monthly, quarterly, yearly
Maintenance responsibility	Lessee	Tenant
Expiry	Expires at date mentioned	Expires at date mentioned
Time period	Long term	Short term
Ownership	Remains with lessor	Remains with landlord
Change in contract	No change for the period fixed	Changes possible

Any Special comments (By team and individual members)

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Annexure 9: Property Maintenance Report

General Checklist

1. Maintenance schedule: A record of the maintenance schedule should be maintained by the institution. This should include details such as the date of the maintenance, the type of maintenance that was performed, and the name of the person or company that performed the maintenance.

Maintenance Area	Schedule Dates	Vendor	Comments
Building and Infrastructure			
Furniture and Equipment			

2. Repair and replacement records: Any repairs or replacements that were made to the property should be recorded. This includes details such as the date of the repair or replacement, the type of repair or replacement that was made, and the cost of the repair or replacement.

Maintenance Area	Repair & Replacement Dates	Vendor	Comments
Building and Infrastructure			
Furniture and Equipment			

3. Service and warranty records: If any services were performed or if any warranties are applicable to the property, records of these should be maintained. This includes details such as the date of the service, the type of service that was performed, and the name of the person or company that performed the service.

Area	Dates	Vendor	Comments

4. Inspection reports: Regular inspections of the property should be conducted, and the reports of these inspections should be maintained. This includes details such as the date of the inspection, the areas of the property that were inspected, and any issues that were identified during the inspection.

Area	Dates	Vendor	Comments

5. Energy usage records: The institution should maintain records of energy usage for the property. This includes details such as the amount of energy consumed, the cost of the energy, and any changes in energy usage over time.

Area	Dates	Vendor	Comments

Any Special comments (By team and individual members)

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Annexure 10: Advisors (Legal and Others)

It is important that Church have advisors at the Bishop Conference level, diocese level and also advisors (informal if required) at the parish level.

These advisors need to be reviewed for their contributions and performance regularly (every 3-5 years). This reality check is important as some advisors may get professionally outdated, lose their influence and connects and may be out of touch with the current context.

Some details of advisor categories and type of issues are given below.

Advisor Categories	Types of Issues
<ol style="list-style-type: none"> 1. Legal advisors: Experienced lawyers who can provide legal guidance and representation on various legal issues, including employment law, property law, criminal law, civil liability, and tax law. 2. Financial advisors: Professionals who can assist with financial planning, investment management, and accounting services to ensure compliance with financial regulations and to manage the Church's financial resources effectively. 3. Human resources advisors: Experts who can help manage 	<ol style="list-style-type: none"> 1. Sexual abuse cases: cases of sexual abuse and assault allegations against members of the clergy in India. 2. Property disputes: The Catholic Church in India has also been embroiled in property disputes with the government and other groups. - Church-run schools that were accused of flouting norms. 3. Conversion allegations: Some right-wing groups in India have accused the Catholic Church of engaging in forced conversions of Hindus to Christianity. 4. Foreign funding allegations: Some groups have also accused the Catholic Church of receiving

<p>employment-related issues, including recruitment, training, compensation, and compliance with labor laws.</p> <p>4. Risk management advisors: Professionals who can help identify and manage risks associated with the Church's activities, operations, and assets.</p> <p>5. Public relations advisors: Experts who can provide strategic guidance on how to manage the Church's public image and reputation.</p> <p>6. IT advisors: Professionals who can assist with managing the Church's information technology systems and ensure data security and privacy compliance.</p> <p>7. Spiritual advisors: Individuals with deep spiritual and religious knowledge who can offer guidance and support to the Church's leaders and members.</p> <p>8. General Professional Services Advisors: Property and Land management, Architects, Medical, etc.</p>	<p>foreign funding and using it to promote religious conversion in India.</p> <p>5. Anti-conversion laws: Several Indian states have passed laws that restrict religious conversion.</p> <p>6. The Kerala Catholic Church land scam:</p> <p>7. The Vatican Bank money laundering case: Indian authorities were also reportedly investigating some transactions involving Indian nationals.</p> <p>8. The FCRA violation case: In 2020, the Catholic Bishops' Conference of India (CBCI) was accused of violating the Foreign Contribution Regulation Act (FCRA) by receiving foreign funds without proper authorization.</p> <p>9. Other general issues: Criminal allegations: Civil liability: Contract disputes: Immigration issues: Taxation issues:</p>
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The parish priest may like to pass on information of the advisors used by the parish to the new incumbent. Records may be maintained in the following format:

Advisor Category	Name	Reviewed last on	Comments

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Annexure 11: Sample - Diocese: Parish Priest Handover Document

Diocese: Parish Priest Handing over Document

Contents

- I. PARISH STRUCTURE:**
- II. PEOPLE/BODIES/UNITS/ASSOCIATIONS & MOVEMENTS IN THE PARISH**
 1. Parishioners
 2. Parish Pastoral Council
 3. Small Christian Communities:
 4. Units, Associations & Movements and Other Bodies
 5. Parish Finance/Projects Council:
 6. Parish House Workers
- III. PARISH AND SACRAMENTS**
 1. Baptisms
 2. First Communion
 3. Confirmation
 4. Holy Communion and Anointing of the Sick
 5. Marriage
- IV. SUNDAY LITURGY**
- V. PARISH FORMATION**
- VI. PARISH FINANCES/ASSETS/DOCUMENTS**
- VII. PARISH PROJECTS (MATERIAL)**
- VIII. PARISH RECORDS**
- IX. SCHOOLS / COLLEGES / OTHER INSTITUTIONS**
- X. SOME DATA / INFORMATION / REPORTS - in brief**
- XI. ANY OTHER MATTER**
- XII. HAND-OVER and TAKE-OVER (General Guidelines)**

Diocese: Handing over document for the Transfer of the Parish Priest

(If space is not enough continue on the other side of the same page. More pages may be added)

I. PARISH STRUCTURE:

1. Name of the Parish/Chapel:
2. Chapels:
 - i. with Resident Chaplains:
 - ii. 'Chapels' with Sunday Mass:
3. Patron Feast of the Church / Chapel and date of celebration: Are they celebrated by the Community / any Institution / President?
4. Date of other feasts in the Church / Chapels and date of celebration: Are they celebrated by the Community / Institution / President/s:

II. PEOPLE/BODIES/UNITS/ASSOCIATIONS & MOVEMENTS IN THE PARISH

1. Parishioners

- a) No. of Catholic Families:
- b) No. of Parishioners:

2. Parish Pastoral Council

- a) Number of members:
- b) If possible and to the extent possible enumerate the achievements and difficulties of PPC.
- c) Is the Bank Account of PPC already incorporated into the Finance Committee / Lay Association?

3. Small Christian Communities:

- a) How are SCCs functioning? How many Small Christian Communities are there?
- b) Are there PATs and CATs?
- c) Are regular meetings of CATs held? (How often)

4. Units, Associations & Movements and Other Bodies

- a) Name of the Units / Associations & Movements functioning in the Parish.
- b) Are the Bank Accounts of Parish Youth, Catechetics and Bulletin already incorporated into Finance Committee/Lay Association?

5. Parish Finance Committee/Lay Association:

- a) All Account Books, Minutes Books and Inventory Books to be shown and handed over:

6. Parish House Workers (Sacristans, Peons, Office Clerks, Choirmaster, Cook, etc.) - *you can give this information on a separate paper*

- a) How many workers are employed?
- b) Personal file for each employee with service conditions and appointment letter to be handed over.
- c) Any useful information that you may wish to convey about them?

III. PARISH AND SACRAMENTS

1. Baptisms

- a) When are the Baptisms celebrated?
- b) Is there pre-Baptismal Catechesis for Parents & God-Parents?

2. First Communion

- a) How many children received first Holy Communion this year?
- b) Any specific date of the Parish for this celebration?

3. Confirmation

- a) When was Confirmation last administered? How many children received it?
- b) Any date fixed for next Confirmation?

4. Holy Communion and Anointing of the Sick

- a) How many home-bound parishioners are there?
- b) Do Sisters or lay extra-ordinary Ministers of Holy Communion take Holy Communion to the home-bound on Sundays?

5. Marriage

- a) Were you conducting any marriage preparation sessions for grooms/brides getting married?

IV. SUNDAY LITURGY

- a) How many Masses are there in the Church and Chapels on Sunday?
- b) Is there an anticipated Sunday Mass anywhere in the parish?
- c) Is the Sunday Liturgy prepared by Liturgical Animators/Community in anticipation?
- d) Any other helpful information on Masses held on different occasions / places?

V. PARISH FORMATION

Annually, were any programmes organized for the growth of the spiritual life of the parishioners [*Formation Sessions, Retreats and Recollections*]?

VI. PARISH FINANCES/ASSETS/DOCUMENTS

- a) Parish/Chapel Inventory Book (for the Church / Priests Residence, etc) to be shown and handed over.
- b) Church property documents to be shown and handed over.
- c) What are the major sources of income for the Parish/Chapel - annual contribution of people, emoluments, produce of the land, etc)?
- d) Memos:
 - i. Are Memos sent regularly?
 - ii. When was the last Memo sent?

VII. PARISH PROJECTS (MATERIAL)

- a) Is any project left incomplete? If yes, could you explain why.

VIII. PARISH RECORDS

- a) Are all the records in the Archives updated / well maintained?
- b) Are the "Marriage Dossiers" properly kept?
- c) Are the *change of names* papers properly preserved?
- d) Have the Registers of Baptism, Marriage, Death been regularly checked by the Dean?

IX. SCHOOLS / COLLEGES / OTHER INSTITUTIONS

- a) **Manager:** Personal File, Confidential Reports and Service Book/s of the Head, having in his custody, should be shown and handed over.
- b) **Heads:** Personal Files, Confidential Reports and Service Books of all Staff members, having in his/her custody, should be shown and handed over.
- c) **Records:** Important Property Records, important documents, sensitive information records, etc, to be handed over.

X. ANY OTHER MATTER

--

XI. SOME DATA / INFORMATION / REPORTS - in brief

1. Names and Tel. Nos of PPC ExCo members
2. The Minutes Book and the File of the PPC to be shown and handed over.
3. Name and Tel. No of PAT Co-ordinator
4. Minutes book of PATs and CATs meetings to be shown and handed over?
5. Name and Tel No of the Head of each of the Units /Associations and Movements
6. Names and Tel. Nos of Finance Committee / Lay Association Administrative Committee members
7. Names, Tel. Nos and wards of the home-bound Communicants
8. Names, Tel. Nos of Extraordinary Ministers of Holy Communion (Sisters as well as lay people)
9. Names and Tel. Nos of all Catechists
10. Names and Tel. Nos of any other important contacts in the parish.
11. All Account Books, Minutes Books and Inventory Books of Finance Committee/Lay Association to be shown and handed over.
12. Church / School property documents to be shown and handed over.
13. You may present a brief report of your ministry in the parish.

XII. HAND-OVER and TAKE-OVER (General Guidelines)

at the time of Transfers of Parish Priests and Chaplains

A. HAND OVER - TAKE OVER (PROXIMATE PREPARATION)

(By Hand-Over_ Take-Over we understand all the ground work whereby the new Parish Priest / Chaplain is initiated into the activities, functioning of parish life, administration and financial position of the Institution/s and introduced to the key people involved in it. This needs to be in peaceful environment and not on the last day before leaving the parish)

1. **Between whom?**
 - Parish Priest to Parish Priest
 - Chaplain to Chaplain
 - Manager/Headmaster to Manager/Headmaster

- Accompanied by members of Finance Committee Administrative Committee, ExCo of PPC, Headmaster / Headmistress and, if needed, clerk of the School.
- In the presence of the Dean or diocesan Authority, such as, the Procurator / Secretary of the Secretariat for Finance Committees / Confraternities.

2. **Needed to remain present:** All the above mentioned persons at the fixed time.

3. **Books/Documents/Articles to be handed over:**
 - Passbooks, Cheque books, FDRs, Account Books, Statement of Accounts
 - Announcement Book, Collection Record book and Memos' file - current and past books
 - Legacies, Property files and plans
 - Inventory book, Employees file, List with telephone nos. of important contacts.
 - Report as per *Proforma* by the outgoing Parish Priest of pastoral action during his tenure. This Report could include: Novenas-Feasts of the parish, main practices in the parish, new initiatives tried out, difficult areas and difficulties faced. Church personnel, Relations between Parish Priest and the Chaplain from PPs perspective and vice-versa, Projects and Court Cases, etc.
 - Gold articles with an appropriate List of the items
 - Keys of the Safe and Bank Lockers

4. **Assistants:** Report of the activities being done by Assistant/s. The outgoing Parish Priest must also make sure that he informs his Assistant that he has to submit himself / Assistants that they have to submit themselves to the new Parish Priest for the reallocation of apostolates. This should be mentioned in his Pastoral Report.
5. **Time-Frame:** The Report of Pastoral Action should be submitted to the respective EV before the Holy Week. The handover-takeover could be from **20th May** onwards, with the outgoing Parish Priest taking the initiative and the Episcopal Vicar of the area facilitating the process.

B. GIVING CHARGE - TAKING CHARGE

(By Giving Charge-Taking Charge we understand the formal ceremony at which the new Parish Priest / Chaplain is given the charge of the Parish / Chaplaincy. This should be done in the presence of the people of the Parish / Chapel of which he is taking charge. So the best occasion is Mass)

1. **Needed to be present:** The Parish Priest/Chaplain taking charge, the outgoing Parish Priest / Chaplain, *if possible*, and the Diocesan Authority. The Diocesan Authority could be any of the five Episcopal Vicars, the Chancellor, the Judicial Vicar, the Vicar General or the respective Dean.

2. The **ceremony** could be based on the triple mission of Jesus and could be arranged thus:

- a) Prophetic Mission - making profession of faith.
- b) Priestly Mission - handing keys of The Blessed Sacrament - All three acts after post-Communion
- c) Kingly Mission - handing keys of the Church.

Conclusion: The ceremony ends with the taking-charge Parish Priest / Chaplain signing the necessary documents.

3. **Timeframe** for this phase could be from **29th May to 1st June**.

4. **Facilitator:** The Episcopal Vicar for the Zone to be the Facilitator for this Phase

ADVISORY: *In view of the above, Parish Priests and Chaplains on transfer should not leave /move out of the Parish / Chapel until the new Parish Priest / Chaplain takes charge or till 1st June.*

Annexure 12: Sample - Religious: Parish Priest Handover Document

Religious Institutions: Handing over document for the Transfer of the Parish Priest

I. Location & Responsibility

1.	Name of the House / Parish	
2.	Name of the Outgoing Parish Priest	
3.	Name of the Incoming Rector Parish Priest	
4.	Date of handing over charge	

II. Closing Balance of CASH IN HAND & BANK ACCOUNTS as on the date of handing over

	<i>Name/Title of Account</i>	<i>Cash in Hand</i>	<i>Bank A/c. No.</i>	<i>Bank Name</i>	<i>Comments</i>
1.					
2.					

III. Particulars of FIXED DEPOSITS as on the date of hand over

	<i>FDR/FD Account No.</i>	<i>Bank</i>	<i>Amount</i>	<i>Deposit Date</i>	<i>Maturity Date</i>
1.					
2.					

Note: The original Fixed deposit receipts must be handed over

IV. Parish Documents / Files

	Name of Document /File	Available (Y) (N)	Remarks
1	Contract agreement with the Diocese		
2	Correspondence with the Bishop / Diocese		
3			
4			

Please add to the list

V. Administrative Documents

	Name of Document /File	Available (Y) (N)	Remarks
1.	Staff profile (if not maintained by administrator)		

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2.	Staff salary register		
3.	Inventory file / register of the parish		
4.	Copies of monthly/quarterly A/c to Diocese		
5.	Copies of Monthly Returns sent to the Province		
6.	Book of Accounts (Current and Past 3 years)		

Please add to the list

VI. Registers

	Name of Document /File	Available (Y) (N)	Remarks
1.	Baptism Register		
2.	Marriage Register		
3.			

Please add to the list

VII. Any other relevant information: policies, customs, practices etc...

--

Signature & Date: Outgoing Parish Priest	Signature & Date: Incoming Parish Priest

(A copy to be signed and filed in the house and another copy to be sent to the Provincial Economist)

Annexure 13: Model Parish Handover Review - Proof of Concept

This “Proof of Concept” review conducted for a model parish handover was undertaken to ascertain the practicality of the Parish Administration Resource (PAR) Booklet

Contents: (1) Parish Profile; (2) Parish Handover Checklist; (3) Zones; (4) Ministries, Groups and Teams; (5) Parish Events (6) General Observations

I. Parish Profile – General Information

Description	Numbers	Comments
Number of Families	1090	
Number of Parishioners	4800	One of the main factors for limited attendance is infrastructure, logistic and parking constraints
Sunday Mass Attendance (approx. 30%)	1500	
Parish Council and Finance Committee Members	35	
Homebound Parishioners	65	
Ministries	10	
Laity engaged in Parish Administration (approx.)	150	
Parishioners engaged in regular Events (approx.)	1200	
Parishioners engaged in special events (approx.)	2000	

Overview: The parish has 1500 (30%) parishioners attending Sunday mass and 150 members engaged in parish administration (many unsolicited volunteers also come forward to take on tasks). Over 1200 (80%) of the regular parishioners are engaged in parish activities and about 500 (10%) are Christmas and Easter Catholics.

This parish may be considered vibrant because of clergy guidance and laity engagement in the multiple, creative, and innovative activities (Spiritual, Service and Community) regularly taken up. Three activities to note were the KOGO, Distress Service Center (detailed below) as well as a highly active senior citizens group which consisted of 180 plus members, with a committee of 35 (multiple persons in each position to take care of absentee committee members - persons traveling overseas or sick). This showed much foresight and commitment. With a little more focus and organization, they could reach higher levels.

II. Parish Handover Checklist	
Handover Documents	Comments
1. Parish Vibrancy Outlook	<i>This is a new concept which has not been attempted</i>
2. Parish Pastoral Plan	<i>Not available</i>
3. Parish Calendar	<i>Not available</i>
4. Parish Ministries and Groups (Sample list)	
• <i>Parish Zones</i>	<i>Provided</i>
• <i>Youth</i>	<i>Provided</i>
• <i>Women's Group</i>	<i>Not separately available</i>
• <i>Women Religious (Participation)</i>	<i>None in Parish</i>
• <i>SVP</i>	<i>Provided</i>
• <i>SSSS _ Social Services</i>	<i>Not taken up as a separate group but integrated with others</i>
• <i>SCC</i>	<i>Provided</i>
• <i>Sr Citizens</i>	<i>Provided</i>
• <i>Prison Ministry</i>	<i>Provided</i>
• <i>Prayer Group</i>	<i>Provided</i>
• <i>Orphanages, Destitute and others</i>	<i>Not taken up as a separate group but integrated with others</i>
• <i>Men Religious (Participation)</i>	<i>None in Parish</i>
• <i>Legion of Mary</i>	<i>Not available</i>
• <i>Inter-Religious</i>	<i>Not available</i>
• <i>Family Apostolate</i>	<i>Not taken up as a separate group but integrated with others</i>
• <i>Ecumenism</i>	<i>Not available</i>
• <i>Catechetics</i>	<i>Provided</i>
• <i>Music Group</i>	<i>Provided</i>
• <i>Readers group</i>	<i>Provided</i>
• <i>Altar Servers</i>	<i>Provided</i>
• <i>Extraordinary Min for Holy Communion EMHC</i>	<i>Provided</i>
• <i>Team – Collections & Counting</i>	<i>Provided</i>
• <i>Team – Distress Resource Centre</i>	<i>Framework shared below</i>

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• <i>Team – Flower & Church Decoration</i>	<i>Provided</i>
• <i>Team – Weekend Help Desk</i>	<i>Provided</i>
• <i>Team – KOGO (Keep One, Give One)</i>	<i>Concept shared below</i>
5. Parish Councils	<i>Provided (Parish Pastoral Council and Finance Committee)</i>
6. Other Important Functions	
• <i>Employee Records</i>	<i>Not available</i>
• <i>Training Records</i>	<i>Not available</i>
• <i>Aid Disbursement</i>	<i>Provided</i>
• <i>Redressal Forums</i>	<i>Not available</i>
7. Important Persons	<i>Few given but not a complete list</i>
8. Administration	
• <i>Accounts and Finance</i>	<i>Provided</i>
• <i>Fund Raising Plans</i>	<i>Not available</i>
• <i>Property Management and Maintenance</i>	<i>No documents available</i>
• <i>Trusts</i>	<i>Linked to diocese</i>
• <i>Contractors and suppliers</i>	<i>Provided</i>
• <i>Contracts and contractual obligations</i>	<i>Provided</i>
• <i>Inventory</i>	<i>Provided but not detailed</i>
• <i>Security</i>	<i>Not available</i>
• <i>School</i>	<i>None in parish</i>
• <i>Cemetery</i>	<i>None in parish</i>
• <i>Chapel/Shrine</i>	<i>None in parish</i>
• <i>Permanent and temporary Staff</i>	<i>Provided – no appointment letters provided</i>
• <i>Advisors, Liaison Connects, etc.</i>	<i>Not provided</i>
• <i>Website – Updating and Maintenance</i>	<i>Not provided</i>
• <i>Policies: Child Protection, HR, Employment, Purchase, Venue Rental, etc.</i>	<i>Not available</i>
• <i>Safety and Safety records – Fire and health safety</i>	<i>Not available</i>
• <i>Complaints and ongoing concerns.</i>	<i>Not available</i>

III. Zones (24 Zones – 1090 Families)

Zone	No. Families	No. Committee Members	Activities
1.	58	2	<p style="text-align: center;">Common Zone Activities</p> <p>Spiritual (Faith Formation) Organizing Devotionals like Rosary, Novenas, Way of the Cross BCC Meetings with Bible Sharing</p> <p>Service Visiting the sick and homebound Assisting families in need (e.g., sickness, death, employment)</p> <p>Social Fellowship, Picnics, Zonal Feast Celebrations, Family Introduction – New families, Know thy Neighbor etc.</p>
2.	60	1	
3.	19	1	
4.	57	1	
5.	41	1	
6.	81	1	
7.	53	1	
8.	85	2	
9.	45	2	
10.	42	1	
11.	37	1	
12.	42	1	
13.	43	1	
14.	28	1	
15.	22	1	
16.	14	1	
17.	16	1	
18.	110	1	
19.	35	1	
20.	38	1	
21.	44	1	
22.	46	1	
23.	41	1	
24.	33	1	
Total	1090	27	

IV. Ministries, Groups and Teams

<i>Name</i>	<i>Committee Members No.</i>	<i>Ministry Members No.</i>	<i>Activities</i>
1. <i>Youth</i>	4	60	
2. <i>SVP</i>	1+4	5	
3. <i>Sr Citizens</i>	35	185	
4. <i>Prison Ministry</i>	1+4	21	
5. <i>Prayer Group</i>	9	50	2 Groups – Charismatic Prayer Group and Prayer Warriors everyday: 24 hours @ 30 min per person
6. <i>Catechetics</i>	1+33	350	
7. <i>Readers group</i>	4	70	
8. <i>Altar Servers</i>	1	37	
9. <i>Extraordinary Min for Holy Communion EMHC</i>	1	15	
10. <i>Music Group</i>	2	30	
11. <i>Team – Collections & Counting</i>	1	12	
12. <i>Team –Weekend Help Desk</i>	1	8	
13. <i>Team – Distress Resource Centre</i>	3	15	Need based. Details shared below
14. <i>Team – Flower & Church Decoration</i>	1	5	
15. <i>Team – KOGO (Keep One, Give One)</i>	6	500	Details shared below
Total	112	1363	Quite a few members are in more than one group

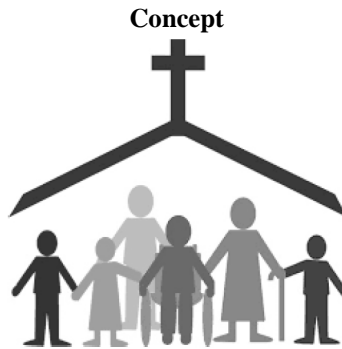
Shepherd of Love – Distress Resource Center

Target Group & Objectives

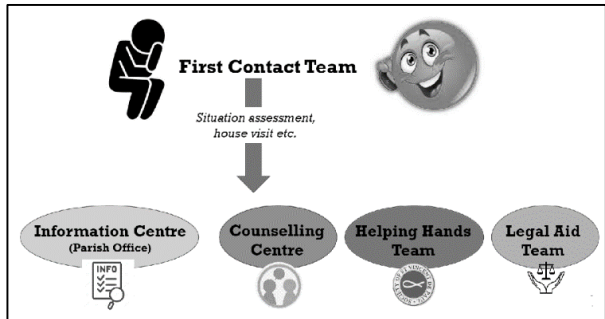
Target Group: Men, women, children, youth, seniors, couples, singles and families in our Parish.

Objective: To provide immediate information and caring support and guidance to parishioners in distress to enable them to independently help themselves.

- Caring Support: Emotional, Physical, Mental, Spiritual
- Distress: Experiencing extreme anxiety, sorrow, pain, worry, nervousness, uncertainty & unease about the outcome.
- Major cause of distress: Relationship, job, family, parents, spouse, addiction, sexual orientation, studies, loneliness, abandonment, abuse, chronic or terminal illness, death, separation, etc.



Operating Model



KOGO (Keep One Give One) Initiative.

Concept: Very often, we find stuff lying around the house, which we are done with using or we never had a need for, but somehow landed up in our possession. Giving it, to someone who has a need for it, makes you feel blessed. On the other hand, asking for something that has been offered helps us to grow in the virtue of humility. KOGO benefits both the giver and the receiver.

Objective/Purpose:

- To build a parish community nurturing the attributes of sharing within the community.
- Spread the Message of the year of Ecology by avoiding waste and putting to use any excess at home.

Process

- Any parishioner who wishes to give any item (this is free of cost) can click a picture of the item and post it on the WhatsApp group.
- Parishioners who wish to claim the item mentions “I would like to contend for this item” on the common group only. No direct 1-1 message to be sent to the Giver of the item.
- After a waiting period of 24 hrs. the admin will conduct a lucky draw and the winner gets the item
- If the contender is only 1 person, he /she gets the item directly.
- General guidelines for eligibility and logistics apply.

V. Parish Events

Spiritual

- Novenas: Our Lady of Velankanni – Novena and Feast. Attendance 400 per day. Feast Day 1200
- Feasts: Triduum Parish Feast – 1000 members attend. Every Zone celebrates the feast.
- Adoration: Charismatic Group – Mondays – 1 hour; First Friday – 1 Hour morning and evening; 150-200 people attend.
- Parish Retreats (visiting teams of preachers) – once or twice a year for 3 days. Attended by approximately 300 to 400 people each day.
- Easter Sunday, Christmas, New Year celebrations – About 2000 attendees

Community

- Fellowship
 - Parish Feast
 - Childrens Day: Attendance 350 - 400
 - Parents Day: Attendance 350 - 400
 - Picnics: Annual Parish Picnic: 100 to 150 also Prayer Group and Altar server group picnics
 - Senior Citizens Events: About 5-6 a year – about 100 attendees
 - Ethnic Group (language based): Not celebrated.
 - Sports and Carol Singing Competitions
 - Christ the King Procession
 - House Blessing coordination
 - Family Day
 - Youth camps and Retreats (about 3 per year)
 - High level of informal meetings after Sunday and weekday mass. (Example: Short birthday celebrations outside church after mass are a regular feature)

Service

- Outreach
 - Visits: Old Age Homes
 - Visit: Prisons
 - Visits: Orphanage
 - Visits: Homebound and sick
 - Adopted families by SSVP.
 - Economic support – Medical, education and sustenance support (Over 100 persons)

Formation

- **Spiritual**
 - Sacrament of Reconciliation: Regular discussion and discernment sessions over a year. Increased participation
 - Eucharist: Regular discussion and discernment sessions over a year.
 - Liturgy and Scripture: Regular discussion and discernment sessions over a year.
 - Lenten and Easter: Regular discussion and discernment sessions over 100 days.
 - Pre-Baptism courses for parents and grandparents given to over 600 persons.
 - Liturgical sessions to various liturgical groups
 - RCIA (Rite of Christian Initiation of Adults) program
 - Adult Confirmation Catechesis

- **Life Skills**

- Career support and guidance programs
- Investment programs
- Will preparation programs.
- Marriage enrichment programs
- Marriage Bureau: Enabling people to find partners, building couple relationships and marriage counselling.
- Movie Night – Six times a year. Movies selected to bring out Christian and moral values. After each movie discussions are held to facilitate the learning process.

VI. General Observations

1. Like this parish there may be many pockets of excellence within and across dioceses. Facilitation of experience sharing among clergy and laity will lead to organic replication and multiplication, of best practices, which would in turn raise the level of engagement – the spirit of synodality in practice. 150 plus motivated and committed laity engaged in administration of a small parish (less than 5000 parishioners) is commendable by any standard.
2. The “Proof of Concept” (POC) verification with respect to the “Parish Resource Administration” booklet was an eye opener to all involved. Many parishioners (from different parishes) were surprised and enthused when presented with the documented findings.
3. The engagement and commitment of the laity together with the guidance of the clergy was instrumental in building the current level of functioning. While nobody is perfect, it is fair to say that many from the parish could contribute by training others. However, a bit of training for council and committee members could help to raise the level. A periodic “Self-Review” of the functioning processes by the parish council and committees could lead to better organizing, process strengthening and documentation discipline. This provides a platform for the passion and spirit to grow.

Annexure 14: General Information – Parish Handover and Takeover

PART 1

1. Parish Finance Monitoring Overview
2. Common Discrepancies Found while Monitoring.
3. A red flagging system OR Early identification of potential irregularities
4. Payment Sanctioning Policy
5. Parish Sample Budget Format
6. Sample Parish 3 Year Statement: Income and Expense

PART 2

1. Parish Priests Change - How to ensure continuity.
2. Change challenges and laity blindly following of church practices.
3. Why some Church authorities do not want to move from their comfort zone
4. Catholic Parish - Measuring continuity of functioning.
5. Continuity Measurement Elements
6. Youth Programs – Special Focus Area for Continuity

General Information: Part 1

Parish Finance Monitoring Overview

The income and expense account heads that need monitoring in parishes may vary depending on the specific activities and operations of each parish, but some common account heads that should be monitored include:

1. **Donations:** This account head includes all donations received by the parish from individuals or organizations.
2. **Offerings:** This account head includes all monetary offerings made during services or events.
3. **Subscriptions:** This account head includes all monetary tithes received by the parish.
4. **Rental income:** If the parish owns any property that is rented out, the rental income should be tracked separately.
5. **Fundraising events:** Income and expenses related to any fundraising events held by the parish, such as bake sales, raffles, or auctions, should be tracked separately.
6. **Salaries and benefits:** This account head includes all salaries and benefits paid to the parish staff, including clergy, administrative staff, and maintenance staff.
7. **Building maintenance and repairs:** This account head includes all expenses related to maintaining and repairing parish buildings, including utilities, repairs, and maintenance.

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8. **Office expenses:** This account head includes all expenses related to running the parish office, such as office supplies, postage, and printing costs.
9. **Outreach and mission work:** This account head includes all expenses related to the parish's outreach and mission work, such as charitable giving and mission trips.

It is important to monitor these account heads regularly to ensure that the parish is operating within its budget and that funds are being used appropriately. This can help to identify any financial issues early on and allow for adjustments to be made as needed.

Common Discrepancies Found while Monitoring.

There are several common discrepancies that can be found when monitoring income and expense account heads in parishes. Some of the most common discrepancies include:

1. **Unrecorded or misrecorded transactions:** This can occur when transactions are not recorded in the parish's accounting system or are recorded incorrectly. This can result in inaccurate financial statements and make it difficult to monitor income and expenses accurately.
2. **Unauthorized expenses:** This can occur when expenses are incurred without proper authorization or approval. This can result in expenses that are not aligned with the parish's mission or budget, and can also create an environment of distrust and confusion among staff and volunteers.
3. **Duplicate payments:** This can occur when the same expense is paid twice, either intentionally or unintentionally. This can result in inflated expenses and can make it difficult to accurately track and monitor expenses.
4. **Improper use of funds:** This can occur when funds are used for purposes other than those for which they were intended. This can result in funds being misused, misallocated or wasted, and can create a negative impact on the parish's financial health and reputation.
5. **Inaccurate inventory tracking:** This can occur when inventory levels are not accurately tracked or accounted for. This can result in overstocking or understocking of inventory, leading to inefficiencies and waste.
6. **Late payments or missed payments:** This can occur when bills or expenses are not paid on time or are missed altogether. This can result in late fees, penalties, or even legal action, and can have a negative impact on the parish's financial health and reputation.

Monitoring income and expense account heads regularly can help to identify these discrepancies early on and allow for adjustments to be made as needed.

A red flagging system OR Early identification of potential irregularities

A red flag system or a set of procedures that helps to identify potential financial irregularities or discrepancies in the financial transactions of a parish should be tailored to the specific needs and circumstances of the parish. Some general elements are:

1. **Clear policies and procedures:** The parish should have clear policies and procedures in place regarding financial transactions, such as purchasing, payroll, and expense reimbursement. These policies should be documented and communicated to all staff and volunteers involved in financial transactions.
2. **Regular monitoring:** The parish should monitor its financial transactions on a regular basis to identify any unusual or suspicious activity. This can include reviewing bank statements, invoices, and other financial documents.
3. **Segregation of duties:** The parish should have a system of checks and balances in place to ensure that no single individual has complete control over financial transactions. This can involve separating responsibilities for authorization, recording, and reconciliation of financial transactions.
4. **Training and education:** The parish should provide regular training and education to staff and volunteers involved in financial transactions to ensure that they are aware of policies and procedures and are able to identify potential red flags.
5. **Reporting and investigation:** The parish should have a system in place for reporting and investigating any suspected financial irregularities. This can involve designating a specific person or committee to receive and investigate reports of suspected irregularities.
6. **Follow-up and corrective action:** The parish should take prompt action to investigate and address any suspected financial irregularities. This can involve implementing corrective actions, such as changes to policies and procedures or disciplinary action.
7. **Ongoing review and improvement:** The parish should regularly review and update its red flag system to ensure that it is effective in identifying potential financial irregularities and addressing them promptly.

Some common policies:

1. **Procurement policy:** This policy outlines the procedures and guidelines for purchasing goods and services. It can include guidelines for requesting and approving purchases, selecting vendors, and maintaining documentation of purchases.
2. **Expense reimbursement policy:** This policy outlines the procedures for reimbursing employees and volunteers for expenses incurred on behalf of the parish. It can include guidelines for submitting expense reports, types of expenses that are eligible for reimbursement, and limits on reimbursement amounts.

3. **Cash handling policy:** This policy outlines the procedures for handling cash transactions, including guidelines for accepting and recording cash, making bank deposits, and maintaining cash balances.
4. **Petty cash policy:** This policy outlines the procedures for handling small cash transactions, including guidelines for maintaining a petty cash fund, making reimbursements from the fund, and maintaining documentation of petty cash transactions.
5. **Payroll policy:** This policy outlines the procedures for processing payroll, including guidelines for calculating employee wages and benefits, withholding taxes, and maintaining accurate payroll records.
6. **Financial reporting policy:** This policy outlines the procedures for preparing and distributing financial reports, including guidelines for the frequency and format of reports, the audience for reports, and the methods for ensuring the accuracy and integrity of financial data.
7. **Conflict of interest policy:** This policy outlines the procedures for identifying and managing conflicts of interest among employees and volunteers. It can include guidelines for disclosing conflicts of interest, abstaining from voting or decision-making related to conflicted transactions, and maintaining documentation of conflicts of interest.

These policies can help to ensure that financial transactions are conducted in a transparent, accountable, and ethical manner, and can help to prevent and detect financial irregularities.

Payment Sanctioning Policy

A payment sanctioning policy outlines the process for approving and authorizing payments, including checks, wire transfers, and other forms of payment. A general outline of a payment sanctioning policy:

1. **Purpose:** This section should provide an overview of the policy and explain the purpose and objectives of the policy.
2. **Scope:** This section should identify the transactions and activities that are covered by the policy.
3. **Roles and responsibilities:** This section should identify the roles and responsibilities of the individuals involved in the payment process, including those who initiate payments, those who approve payments, and those who authorize payments.
4. **Approval process:** This section should outline the process for approving payments, including the required documentation, the individuals responsible for approving payments, and the criteria used to determine whether a payment should be approved.

5. Authorization process: This section should outline the process for authorizing payments, including the individuals responsible for authorizing payments, the criteria used to determine whether a payment should be authorized, and any documentation requirements.
6. Documentation and record keeping: This section should outline the requirements for documenting and recording payments, including the types of records that should be maintained, the format of the records, and the retention period for the records.
7. Monitoring and reporting: This section should outline the process for monitoring and reporting on payment activities, including the types of reports that should be generated, the frequency of reporting, and the individuals responsible for generating and reviewing reports.
8. Exceptions: This section should outline any exceptions to the policy, including the circumstances under which exceptions may be granted and the individuals responsible for approving exceptions.
9. Enforcement: This section should outline the consequences for non-compliance with the policy, including any disciplinary actions that may be taken.

A well-designed payment sanctioning policy can help to ensure that payments are made in a transparent, accountable, and ethical manner, and can help to prevent and detect financial irregularities.

Parish Sample Budget Format xxxx - xxxx

Parish: XXXXXXXXXXXXXXXXXXXX

(This is only an indicative template which may be modified based on the context and needs of the local parish. Please note that this format can be modified to accommodate the past 3 years expense accounts)

Funds of the Institution as on:	
Fixed Deposits	
Saving Bank Account	
Cash In Hand	
TOTAL	

Overview		
Account Heads	Receipts	Payments
1		
2		
3		
4		

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INCOME				
Sr. No.	Particulars	Approved Budget - year 01.04.20x1 31.03.20x2	Actuals As On xx.xx.20 x1	Proposed Budget - Year 01.04.20x1 31.03.20x2
Art. 1	Interest			
a)	On Fixed Deposit Receipts			
b)	On Balances with Saving Bank Accounts			
Art. 2	Rent			
a)	High School Building			
b)	Parish Hall @ Rs Per function			
c)	Ground @ Rs1000/- Per function			
Art. 3	Sundry Collections			
a)	Box Collections from the Church. – C1			
b)	Box Collections of – C2			
c)	Tray Collection For Retreat Centre – C3			
d)	Holy Week Collections – C4			
e)	Feast Collections 1. AAAA			
	2. BBBB			
	3. CCCC			
Art. 4	Dividends			
a)	xxxx			
Art. 5	Fees Receivable			
a)	xxxx			
Art. 6	Catechism			
a)	Catechism income (First Holy Comm. Children)			
b)	Contribution from Catechism children			

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c)	Donations received			
d)	Drama Income			
Art. 7	Bulletin			
a)	Subscriptions			
b)	Advertisements			
Art. 8	Sundry Collections			
a)	Sunday & Friday Collections			
b)	Novenas & Feast Day Collection			
c)	Collection from statue			
Art. 9	Donations			
a)	From the Parishioners & Well-wishers			
Art. 10	Other Sources Income			
a)	Canteen collection			
b)	Fete / Drama Income.			
c)	Sale of Medals / Second owner items			
Art. 11	Ministries & Apostolates			
a)	Youth			
b)	Legion of Mary			
c)	Prayer Group			
d)	Sr Citizens			
e)	Prison Ministry			
Art. 12	Agricultural			
a)				
b)				
Art. 13	Cemetery: Sale of Niches/ Headstones			
	Headstones			
a)				
b)				
	Niches			
c)				

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d)				
Art. 14	Miscellaneous Income			
a)				
b)				
	Balance C/F			

EXPENSE				
Sr. No.	Particulars	Approved Budget - year 01.04.20xx 31.03.20x1	Actuals As On xx.xx.20 x1	Proposed Budget - Year 01.04.20x1 31.03.20x2
Art. 1	Salaries & Wages			
a)	Allowance Office clerk			
b)	Allowance - Part Time Sacristan			
c)	Allowances - Asst. Sacristan			
d)	Allowances - Gravedigger			
e)	Allowances - Choir Master			
f)	Allowances – Part time Cook			
g)	Allowance – Part Time House Maid/Cook			
h)	Annual allowance – Finance Asst			
i)	Christmas gift to the Employees			
j)	Thrift Contribution to the employees Fund			
k)	Allowances - Members of the Admn. Committee			
l)	Cleaner			
m)	Contribution to Good Samaritan Fund			
n)				
o)				
Art. 2	Religious Expenses			
	Legacy masses and celebrations			

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a)				
b)				
c)				
d)				
Art. 3	CATECHETICS			
a)	Printing & Stationary			
b)	Retreat			
c)	Gifts			
d)	Refreshments & Snacks			
e)	Transport			
f)	Picnic Expenses			
g)	Fees			
h)	Pandal			
Art. 4	Repairs and Maintenance			
a)				
b)				
Art. 5	Bulletin			
a)				
b)				
Art. 6	Meetings, Seminars and Enrichment Programs			
a)				
b)				
Art. 7	Religious Obligations			
	Novenas			
a)				
b)				
	Holy Week			
c)				
d)				
	Christmas			
e)				
f)				
	Easter			
g)				
h)				
Art. 8	Feast days			

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Art. 9	Agricultural Expenses			
Art. 10	Printing and stationary			
Art. 11	Fees Payable			
Art. 12	Electricity, Water & Telephone			
Art. 13	Transport & Conveyance			
Art. 14	Contribution Payable			
Art. 15	Miscellaneous			
	Total			

Brief Overview – Value as on		Rs. '000	Comments
1.	Properties (number and values)		
2.	Gold (Weight, value, items etc.)		
3.	Inventory		
4.	Antiques		
5.	Fixed deposits and Investments		
	Total		

Sample Parish 3 Year Statement: Income and Expense

(The statement details need to be modified based on local operations. This helps to understand the continuity and changes)

3 Year Parish Income Statement						
Sr. No.	Particulars	Actuals 01.04.20xx 31.03.20x1	Actuals 01.04.20x1 31.03.20x2	Actuals 01.04.20x2 31.03.20x3	Approved Budget 2023-24	Actuals As On xx.xx.20x4
Art. 1	Donations					
	•					
	•					
Art. 2	Offerings					
	•					
	•					
Art. 3	Fundraising Events					
	•					
	•					
Art. 4	Subscriptions					
	•					
	•					
Art. 5	Other income					
	•					
	TOTAL					
3 Year Parish Expense Statement						
Art. 6	Salaries & Wages					
	•					
Art. 7	Religious Expenses					
	•					
Art. 8	Repairs and Maintenance					
	•					
Art. 9	Office Expenses					
	•					

Art. 10	Utilities: Electricity, Water and Telephone					
	•					
Art. 11	Feast days and Novenas					
	•					
Art. 12	Religious Obligations and Contributions					
	•					
Art.13	Miscellaneous					
	•					
	TOTAL					

General Information: Part 2

Parish Priests Change - How to ensure continuity.

When a parish priest leaves, it can be challenging to ensure continuity of leadership and pastoral care for the congregation. Some suggested strategies to help maintain continuity:

1. **Develop a transition plan:** When a PP announces that he will be leaving, the parish leadership should begin developing a transition plan to ensure a smooth handover of duties. This plan should include details on who will take on the priest's responsibilities during the transition period, and how the new parish priest will be assisted during the familiarization period. A timebound plan with clear milestones will help.
2. **Communicate with the congregation:** It is important to keep the congregation informed about the priest's departure and the transition plan. Regular updates through email, social media, or the church bulletin can help to ensure that everyone is aware of the situation and can prepare accordingly.
3. **Appoint an interim leader:** If the search for a new PP will take some time, it may be necessary to appoint an interim leader to oversee the parish's activities during the transition period. This person can be a retired priest, a deacon, or a layperson with leadership experience.
4. **Engage the congregation:** During the transition period, it is important to keep the congregation engaged and involved in the life of the church. This can be done by organizing events, outreach activities, and small group gatherings.
5. **Maintain continuity in liturgical practices:** To ensure continuity in liturgical practices, the parish should maintain the same schedule for Mass and other

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sacraments during the transition period. This will help to provide stability and familiarity for the congregation.

6. **Support the new priest:** Once a new PP is selected, it is important to provide him with support and resources to help him get up to speed quickly. This can include providing him with information about the parish's history, culture, and needs, as well as introducing him to key members of the congregation and staff.

By following these strategies, a parish can help ensure continuity of leadership and pastoral care during a transition period and minimize any disruption to the life of the church.

Challenges related to changes in parish functioning, and laity blindly following church practices.

The reasons why lay people may follow church practices blindly can be complex and vary from person to person. Some possible factors that could contribute to this behavior:

1. **Tradition:** For some lay people, following church practices is a tradition that has been passed down from generation to generation. They may view it as a way to honor their ancestors and maintain a connection to their cultural or religious heritage.
2. **Belief in authority:** Some lay people may place a great deal of trust in religious leaders and institutions. They may believe that these leaders have special insights into the nature of the divine and are therefore best equipped to guide their spiritual lives.
3. **Fear of punishment:** Some lay people may feel a sense of obligation to follow church practices out of fear of punishment or divine retribution. They may believe that disobedience to church teachings could lead to eternal damnation or other negative consequences.
4. **Sense of community:** For many lay people, the church provides a sense of community and belonging. They may follow church practices as a way to connect with others who share their beliefs and values.
5. **Lack of critical thinking:** Some lay people may not have had the opportunity or encouragement to develop critical thinking skills. They may accept church teachings without question, simply because they have never learned how to challenge or question authority.

It is important to note that blindly following church practices can also have negative consequences, such as promoting harmful practices or limiting individual freedom and personal growth. Therefore, it is important for individuals to balance their respect for tradition and authority with their own critical thinking and ethical reasoning.

Why some Church authorities do not want to move from their comfort zone

A few reasons why church authorities may not want to move from their comfort zone:

1. **Fear of change:** Like many people, church authorities may be resistant to change because it can be uncomfortable or unsettling. They may prefer to stick with what is familiar and predictable, rather than taking a risk on something new and untested.
2. **Preservation of tradition:** Many church authorities see their role as preserving and upholding the traditions and teachings of their faith. They may view changes to these traditions as a threat to the integrity and authenticity of the church.
3. **Power and control:** Church authorities may have a vested interest in maintaining the status quo because it allows them to retain their power and influence within the church hierarchy. They may be reluctant to cede control or share decision-making authority with others.
4. **Resistance to outside influence:** Church authorities may be wary of outside influence, particularly from secular sources or other religions. They may view change as a form of capitulation to outside pressures, rather than a genuine response to the needs and desires of the congregation.
5. **Lack of vision:** Finally, some church authorities may simply lack the vision or imagination necessary to see the potential benefits of change. They may be so focused on the day-to-day operations of the church that they cannot see the bigger picture or envision a different way of doing things.

It is important to note that while resistance to change is common in many organizations, including churches, it can also lead to stagnation and a failure to adapt to changing circumstances. Therefore, it is important for church authorities to balance their respect for tradition with a willingness to explore new ideas and approaches.

Catholic Parish - Measuring continuity of functioning.

To ensure the continuity of functioning in a Catholic parish, several factors need to be assessed or measured. Some examples:

1. **Financial Stability:** One critical factor for the continuity of functioning in a Catholic parish is financial stability. The parish needs to maintain a balanced budget and ensure that it has sufficient funds to cover all its expenses. The financial health of the parish can be assessed by measuring its revenue streams, operating expenses, and outstanding debts. It is also essential to ensure that proper financial controls and procedures are in place to avoid fraud or mismanagement.
2. **Membership and Attendance:** Another important factor for the continuity of functioning in a Catholic parish is membership and attendance. The parish needs to have a sufficient number of members who attend regular worship services, contribute to the community, and volunteer for various activities. The membership

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and attendance can be assessed by measuring the number of registered parishioners, regular attendees, and volunteers.

3. **Pastoral Services:** The continuity of functioning in a Catholic parish also requires the provision of effective pastoral services to its members. Pastoral services include sacramental preparation, counseling, spiritual guidance, and outreach programs. The effectiveness of pastoral services can be assessed by measuring the participation rates, feedback from parishioners, and the impact of the services on the community.
4. **Leadership and Governance:** Another critical factor for the continuity of functioning in a Catholic parish is effective leadership and governance. The parish needs to have competent and committed leaders who can provide strategic direction, manage resources, and ensure that the community's needs are met. The leadership and governance can be assessed by measuring the performance of the parish council, the pastor's effectiveness, and the level of engagement of the parishioners in decision-making.
5. **Community Outreach:** Finally, the continuity of functioning in a Catholic parish requires an active and engaged community that reaches out to those in need. Community outreach can be assessed by measuring the level of participation in social justice programs, charitable giving, and volunteer work.

Regular assessment and monitoring can help identify areas for improvement and ensure that the parish continues to meet the needs of its members and community.

Continuity Measurement Elements

Financial Stability:

- **Revenue Streams:** Measure the parish's revenue streams, including donations, fundraising activities, and other income sources. Compare these with the parish's expenses to ensure that the budget is balanced.
- **Operating Expenses:** Measure the operating expenses of the parish, including salaries, utilities, maintenance, and other costs. Analyze these expenses to ensure that they are reasonable and aligned with the parish's goals and priorities.
- **Debt Management:** Monitor any outstanding debts and ensure that payments are made on time. Create a plan to manage the debt and reduce it over time.
- **Financial Controls:** Ensure that proper financial controls and procedures are in place to prevent fraud, mismanagement, or other financial irregularities. These controls may include regular audits, segregation of duties, and independent oversight.

Membership and Attendance:

- Registered Parishioners: Measure the number of registered parishioners and compare it to previous years. Analyze any trends or changes in membership.
- Attendance at Mass: Track the attendance at Mass and compare it to previous years. Analyze any trends or changes in attendance.
- Volunteer Participation: Measure the level of volunteer participation in various parish activities, such as social events, outreach programs, and other initiatives. Analyze any trends or changes in volunteerism.

Pastoral Services:

- Sacramental Preparation: Measure the number of individuals who participate in sacramental preparation programs, such as baptism, confirmation, and marriage. Analyze the effectiveness of these programs in preparing individuals for the sacraments.
- Counseling and Spiritual Guidance: Measure the number of individuals who seek counseling or spiritual guidance from the parish. Analyze the effectiveness of these services in meeting the needs of the community.
- Outreach Programs: Measure the level of participation in outreach programs, such as food banks, homeless shelters, and other initiatives. Analyze the impact of these programs on the community.

Leadership and Governance:

- Parish Council Performance: Measure the performance of the parish council, including its ability to provide strategic direction, manage resources, and make decisions in the best interest of the community.
- Pastor's Effectiveness: Measure the effectiveness of the pastor in leading the parish and providing spiritual guidance to the community. Analyze the pastor's ability to communicate with the community and build relationships with parishioners.
- Parishioner Engagement: Measure the level of engagement of parishioners in decision-making and other aspects of parish life. Analyze the effectiveness of the parish's governance structures in facilitating parishioner engagement.

Community Outreach:

- Social Justice Programs: Measure the level of participation in social justice programs, such as advocacy initiatives, environmental programs, and other initiatives. Analyze the impact of these programs on the community.
- Charitable Giving: Measure the level of charitable giving from the parish and its members. Analyze any trends or changes in giving.
- Volunteer Work: Measure the level of volunteer work performed by the parish and its members. Analyze any trends or changes in volunteerism.

Regular assessment and monitoring of these factors can help ensure the continuity of functioning in a Catholic parish and identify areas for improvement.

Youth Programs – Special Focus Area for continuity

Youth focused programs are an essential part of the Catholic parish community, and their success can also be measured to ensure their continuity. Here are some factors to consider when assessing youth programs:

(This format could be used for other ministries that are important to the local parish).

Participation:

- Measure the number of youth who participate in parish youth programs, including retreats, faith formation classes, youth groups, and social activities.
- Analyze trends in youth participation to identify potential areas for growth or improvement.

Program Effectiveness:

- Assess the effectiveness of youth programs in meeting their stated goals and objectives, such as promoting spiritual growth, building community, and developing leadership skills.
- Measure the impact of youth programs on the overall life of the parish community, including the engagement of families and the integration of youth into parish life.

Volunteer Involvement:

- Measure the level of volunteer involvement in youth programs, including adult leaders, mentors, and volunteers.
- Assess the effectiveness of volunteer leadership in fostering a positive and engaging environment for youth participants.

Support and Resources:

- Assess the level of support and resources available for youth programs, including financial resources, facilities, and equipment.
- Analyze any potential gaps in resources and work to address them to ensure the continuity of youth programs.

Community Outreach:

- Assess the impact of youth programs on the wider community, including outreach initiatives and service projects.
- Analyze the effectiveness of youth programs in engaging youth in service and social justice initiatives and building relationships with the wider community.

Space for Reference Notes

Space for Reference Notes

Endorsements Continued

Pastoral Clergy

Congratulations on bringing out a well-planned and detailed document on the parish handing over tool. A new Priest normally takes time to set the ball rolling in a new unknown parish in an effective manner at the start. It's due to lack of contextual historical knowledge and resource of the new parish.

It is good to know that for every process there is a process specific document so that the knowledge transfer sessions and handing over goes smoothly. Lack of documentation of the process would lead to miscommunication and gaps in the entire ecosystem.

This is pivotal and will add value, reaping long term benefits because this document will join many dots to help the priest and the people in an objective measurable way to keep the parish moving in a progressive upward movement. It will also help build upon the progress of the previous parish team rather than destroy and rebuild.

This document will also give a framework to the budding seminarians to plan and prepare themselves for their pastoral ministry in a smart way.

Senior Religious priests

An apt booklet for the need of the hour! Congratulations E-VAAC members for the work undertaken and the finesse it has. The Bishops and Religious Superiors have a ready-made instrument in hand to make sure things are on the right track from initiation. Dear Bishops and Superiors, this is what you need to implement if you want a transparent and vibrant church, in a spirit of synodality.

Religious sisters involved in parish apostolate

We were on the look-out for a form for the hand-over of the Parish. Every time a Parish Priest is transferred the incumbent has a number of complaints. The outgoing ones leave in a huff and are not bothered about a proper hand over process. The new one has to start from scratch, as there are many unfinished plans with insufficient information provided. This booklet will go a long way in solving the lacunae.

Parishioners and council members

This is a timely and structured approach towards handing and taking over the responsibilities of a parish because it helps all stakeholders to understand the complexity involved in running a parish effectively. For a parishioner - council member, the transparency that the process brings will go a long way in ensuring that the parish is effective. It will encourage more laity to the support activities of running a parish.

As it is comprehensive and detailed, even if the Parish priests take certain sections to start with, it will be beneficial to all

Seminary Rectors and Directors

The resource document “Parish ‘Handover – Takeover’”, is very comprehensive and all inclusive, including those involved. If followed systematically many confusions and complications can be avoided and a smooth and transparent functioning will fall in place. There will be smooth follow-up, coordination and certainly growth for the common good of the clergy, the laity, the parish, and the Church.

Though meant primarily as an aid to the Parish personnel (Parish Priests, Assistant Parish Priests, laity) can also be profitably used by seminarians, especially the ones who are finishing their theological curriculum. The theological studies lay the foundation on which to build the priestly life. But this theological training is not enough when the newly ordained priest enters the complex Parish reality. The present document fills this gap and provides the seminarians with the necessary practical vision of the general set-up of a Parish. This is seen especially when the document deals with accessing the vibrancy of the parish. It stands out also when the document touches on the reality of ‘Parish and Sacraments’.

*The Rectors of Seminaries can introduce this document to the seminarians in their last year of Theology. An adequate presentation and the need to pass from a ‘Pastoral of Sacraments to a Pastoral of Evangelization/mission and how the seminarian is to be formed with a missionary impulse would greatly enrich the present document (see the document issued by the ‘Congregation of Clergy “The pastoral conversion of the Parish community in the service of the evangelizing mission of the Church.”; see also *Evangelii Gaudium* n. 25-33).*

Academic Leaders

This thoughtful, practical work should be widely disseminated on every continent, because the parochial structure is replicated throughout the world. It should be mandatory reading in seminaries, and for religious congregations whose personnel work in the parish structures.

This document was shared with a newly appointed first-time parish priest in the Archdiocese of Cape Town. He is in his fifties and has been in schools and leadership all of his apostolic life so far. He wrote to me: Thanks very much for this valuable document. I look forward to going through it and getting good guidance. Anything else you have on parish work will be greatly appreciated."

Dimensions Global Christian Chamber of Commerce

As organizations around the world continue to leverage the power of processes, automation, systems and technology to create common understanding and deliver impact, this booklet provides us many tools and checklists to enhance the productivity and quality of our Church administration. The mapping of various processes down to the activity level will promote better coordination and ensure consistency. It is also easier to improve a process or identify an issue if it is documented well.

The book guides teams to fulfill their responsibilities without being micromanaged and also helps avoid costly mistakes and all-round dissatisfaction. It will ensure the continuity of good practices even after a change in the leadership team in our parish units. At Dimensions Global, we are committed to partnering with our parishes to help implementation of the ideas, strategies and techniques suggested in the book to ensure a more vibrant and synodal church and make good things come to be.

Cardinal Mario Grech responded positively to E-VAAC's (Evangelizing for a more Vibrant, Aware and Alert Church) mail which expressed concern about implementation of Synod findings. He too expressed concern which motivated Poona Diocese (India) to explore practical avenues for implementation, while continuing the Synodal journey.

Appreciating Cardinal Grech's response, the Bishop of Poona and the Poona Diocese Synod Convenor, together with E-VAAC, set up a PDSSIEP (Poona Diocese Sustainable Synod Implementation Exploration Project) team to explore the practicality of implementation. The PDSSIEP team, formed in July 2022, consisted of about 35 members which included laity, men and women religious as well as diocesan clergy. This team met regularly for 9 months.

This generic document, "Parish Administration Resource Booklet" (PAR-Booklet) was developed by E-VAAC through an iterative process. Inputs were taken from the PDSSIEP team, Bishops, experienced Parish priests, lay council members and religious members, who have been engaged with the functioning of parishes from several dioceses across the world. All actively collaborated in this process.

The PAR Booklet is aimed to be of use to Bishops, Parish Priests, Council Members and Formation Professors. The focus is on enhancing and enlightening the Synodal journey, as well as facilitating greater laity engagement in parishes.

In the spirit of synodality that leads towards a more vibrant Church
Alan Doulton
(E-VAAC Group Facilitator)

FOR PRIVATE CIRCULATION

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