



**ARCHDIOCESE OF KANSAS CITY IN KANSAS  
PASTOR/ADMINISTRATOR TRANSITION GUIDELINES  
APRIL, 2018**

**Purpose:** The purpose of these guidelines is to provide incoming pastors and parochial administrators with a detailed collection of important information that will assist in the transition of being appointed to a new parish. It is further intended to assist in the continued mission of the parish and cohesiveness of the parish community. Please note that these guidelines are provided for your convenience in the transition of parish leadership; they are recommended for your use but are not requirements of the Archdiocese. Additionally, please be certain to keep all passwords, garage codes, etc. confidential.

- 1) Timing:** Immediately after the appointment of the new pastor has been announced, the incoming pastor should contact the outgoing pastor to begin planning for the transition. The following items should be considered to ascertain that all required transitional steps are completed in a timely manner:
  - With the assistance of parish staff and parish volunteers (if necessary) the outgoing pastor will immediately begin to assemble the “Transitional Worksheet.” (below)
  - The incoming and outgoing pastors will schedule a time to meet to discuss and review the Transitional Worksheet. This initial meeting should take place at least thirty days prior to the effective date of appointment for the incoming pastor.
  - Discuss and resolve any scheduling conflicts, such as vacation or other commitments, which may impact the effective date of appointment.
  - To assist in the transition process, the outgoing pastor should provide the incoming pastor with finance council meeting minutes, pastoral council meeting minutes, staff meeting minutes, cemetery board meeting minutes, etc.
- 2) Transitional Worksheet Review:** Once the incoming pastor is in receipt of the transitional worksheet, he should review it in detail. It is important to make note of any questions or concerns while reviewing the worksheet. An additional meeting should be scheduled to discuss any questions and concerns. This meeting can be made over the phone or through e-mail if a face to face meeting is difficult to schedule.
- 3) Chancery Assistance:** Incoming pastors, as well as outgoing pastors, should feel free to contact the Chancery staff to answer any questions that arise during the transition period.
- 4) Ongoing Support:** It is recommended that the outgoing pastor make himself available to answer questions that the incoming pastor may have on an ongoing basis. At some point in time ongoing support will cease at which time questions should be directed to the parish staff.



## **Transitional Worksheet**

### **RECTORY INFORMATION:**

- Provide the incoming pastor with a detailed list of information or the physical item regarding the rectory. Information could include, but not necessarily limited to:
  - Contact information for all utility providers
  - Wi-Fi Password(s)
  - Garage door password
  - Outside entrance door(s) passwords
  - Door keys
  - Garage door opener
  - Lawn care provider
  - Maintenance contacts
  - Sprinkler system information
  - Applicable information regarding neighbors
  - Local grocery store and other retailers
  - Arrangements for rectory meals

### **CLERGY:**

- List all deacons that assist at the parish. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information. Include a brief description of the deacon's responsibilities and job description.
- List all other clergy that assist at the parish when the current pastor is on vacation or when assistance is needed in celebrating Mass. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.

### **STAFF:**

- Prepare a roster of all paid employees. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.
- Prepare a single sheet job description for each employee.
- Communicate to the incoming pastor any personnel issues that exist. Communicate to the incoming pastor strengths and weakness of each employee, if deemed necessary.



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### **KEY VOLUNTEERS:**

- Prepare a roster of all key volunteers. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.
- Prepare a single sheet description of the volunteers' responsibilities of assisting at the parish.
- Communicate to the incoming pastor any issues that exist regarding volunteers.
- Communicate to the incoming pastor strengths and weakness of each key volunteer, if deemed necessary.

### **FINANCE COUNCIL:**

- Prepare a roster of all finance council members, inclusive of current tenure and date of term expiration. Make special note of the finance council chair. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.
- Communicate to the incoming pastor any issues that exist regarding finance council members.
- Provide the incoming pastor with finance council meeting minutes for the past twelve months. Additional meeting minutes should also be provided if deemed necessary.
- Provide the incoming pastor with the next scheduled finance council meeting date.

### **PASTORAL COUNCIL:**

- Prepare a roster of all pastoral council members, inclusive of current tenure and date of term expiration. Make special note of the pastoral council chair. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.
- Communicate to the incoming pastor any issues that exist regarding pastoral council members.
- Provide the incoming pastor with pastoral council meeting minutes for the past twelve months. Additional meeting minutes should also be provided if deemed necessary.
- Provide the incoming pastor with the next scheduled pastoral council meeting date.



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**OFFERTORY COLLECTION:**

- Communicate to the incoming pastor current Offertory collection policies and procedures.
- Communicate to the incoming pastor any responsibilities he may have regarding the Offertory collection procedures.
- Provide the incoming pastor with safe(s) combinations and the list of those persons who have the safe combination.

**STAFF MEETINGS:**

- Alert the incoming pastor of any upcoming staff meetings that he may choose to attend prior to appointment.

**COMMITTEES & MINISTRIES:**

- Prepare a list of parish/school related committees and ministries. Make special note of chairpersons or department heads. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.
- Provide the incoming pastor with committee and ministry meeting minutes for the past twelve months. Additional meeting minutes should also be provided if deemed necessary.

**CORPORATE INFORMATION:**

- Provide the incoming pastor with all parish related corporate information

**LOCAL CONTACTS:**

- Prepare a list of key local contacts; neighboring religious leaders, banking institution personnel for banking accounts used by the parish, mayor, law enforcement, etc. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.

**KEY VENDORS:**

- Prepare a list of key vendors. Be certain to include addresses, telephone numbers, e-mail addresses and any other applicable contact information.



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### **PROJECTS:**

- Communicate to the incoming pastor any projects currently underway on the parish campus.
- Communicate to the incoming pastor any future projects planned for the parish or school (if applicable).

### **INVENTORY:**

- Prepare a detailed inventory list of all property and equipment for the incoming pastor. Include the current conditions of buildings, parking lots and utilities.

### **FINANCIAL INFORMATION:**

- Provide the incoming pastor with detailed financial reports. At a minimum a current balance sheet, income & expense report, budget comparison report, recent audit reports (including status of corrective actions) and the annual reports to the Archdiocese for the past two years.
- Provide the incoming pastor with a detailed list of parish/school related banking accounts operating on behalf of the parish. Also, provide key contacts at each of the banking institutions the parish/school use.
- Provide a listing of all unpaid amounts (bills, assessments, debt).

### **CHALLENGES & OPPORTUNITIES:**

- Communicate any information regarding individuals or situations that the incoming pastor will encounter or should be made aware of.

### **SCHOOL INFORMATION:**

- If the parish has a school, have the principal prepare a report summarizing the schools procedures. Be certain to include any responsibilities of the pastor and any pending matters that may need his attention.
- Include all aspects of tuition, fee and other income receipt procedures.
- Include all aspects of disbursement procedures.
- Provide the incoming pastor with a copy of the budget for the upcoming school year. Be certain to communicate any unusual line items with a detailed explanation.



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**CELL PHONE & OTHER ALLOWANCES:**

- Communicate to the incoming pastor the current cell phone policy for pastors at the parish.
- Communicate food allowance policies for pastors at the parish.
- Communicate any other pastor allowance policies of the parish.

**OTHER:**

- Include any other information you feel is necessary to promote an easy transition for the incoming pastor. Information could include, but not necessarily limited to:
  - Contact information for the sacristan(s) that normally sets up before week day Masses.
  - Contact information for the sacristan(s) that normally sets up for weekend Masses.
  - Liturgical roster for the current month and future months if completed.
  - Weddings, baptisms or other sacraments that are scheduled.

Please note that this is the inaugural attempt at the “Transitional Worksheet.” No one knows better than you (our priests) what would be helpful during your transition period. Please feel free to contact the Office of Finance & Controls (Internal Audit) to make recommendations to improve the transition process. Thank you for your attention to this subject and May God Be with you in your transition period.