



# Pastoral Handbook

Holy Protection of Mary  
Byzantine Catholic Eparchy of Phoenix

2010 Edition

1	Documents Table of Contents
2	General Norms
3	General Administration
4	Financial Administration
5	Clergy
6	Lay Persons
7	Worship
8	Care of Vocations
9	Index
10	Appendix A Corporate Documents
11	Appendix B Kenedy Directory & Group Ruling
12	Appendix C Chart of Parish Accounts
13	Appendix D Safe Environment
14	Appendix E Index to the Eastern Code of Canon Law
15	Appendix F Other Documents/Updates





## Decree of Promulgation

By the Grace of God  
And the favor of the Apostolic See  
I, Gerald Nicholas Dino, Bishop  
of the  
Holy Protection of Mary Byzantine Catholic Eparchy of Phoenix  
By the authority invested in me  
According to the *Code of Canons of the Eastern Churches*  
Promulgate this revised *Pastoral Handbook*.

I further decree and order that this *Pastoral Handbook*  
Replaces all former editions  
And takes effect  
On the 1<sup>st</sup> day of October  
In the Year of Our Lord two thousand and ten.

Given at the Pastoral Center of the  
Holy Protection of Mary Byzantine Catholic Eparchy of Phoenix  
on this 1<sup>st</sup> day of September, in the year of Our Lord two thousand and ten.

+ *Gerald N. Dino*  
Most Reverend Gerald N. Dino  
Bishop of the Eparchy of Phoenix

*Wesley W. Izer*  
Right Reverend Wesley W. Izer  
Chancellor



## HOLY PROTECTION OF MARY BYZANTINE CATHOLIC EPARCHY OF PHOENIX

Pastoral Center - 8105 North 16th Street - Phoenix, AZ 85020  
Phone: (602) 861-9778 - FAX (602) 861-9796  
[www.eparchy-of-van-nuys.org](http://www.eparchy-of-van-nuys.org)

***Glory to Jesus Christ!***

September 1, 2010  
Beginning of the New Ecclesiastical Year

Dear Brothers and Sisters in the Lord:

On October 1, 2010 we will celebrate the Feast of the Holy Protection of Mary who is our Eparchy's heavenly patroness. Fittingly on this date in 1992, the Most Reverend George M. Kuzma, the second Bishop of the Eparchy of Van Nuys published the first *Pastoral Handbook* for our Eparchy. His idea was that it was to be a compilation of the laws, policies, guidelines and procedures used in the Eparchy. He wanted it written in a style that was, as much as possible, devoid of legalese so as to be understood and implemented easily.

Today I present to you the revised 4<sup>th</sup> edition of the *Pastoral Handbook*. It has been scrutinized by canon lawyers, our clergy and religious over the last four years to bring it in better compliance with the actual practices of our Eparchy as well as being in conformity with canon and civil law. It is a tool that will be helpful to us all as we face a variety of issues in our complex world.

I ask that all the clergy and religious of the Eparchy read this edition carefully and share its contents with the faithful, especially in those areas that directly refer to them. Know its contents so that it can better serve your needs. Let it become an aide to all in order to promote the Gospel and life of the Byzantine Catholic Church of Phoenix!

With my prayerful best wishes, I am

Sincerely yours in Christ,

+ *Gerald N. Dino*  
Most Reverend Gerald N. Dino  
Bishop of the Eparchy of Phoenix

# Pastoral Handbook 2010 Edition

## Table of Contents

### **Section 1: Documents and Table of Contents**

Decree of Promulgation

Letter: Most Reverend Gerald N. Dino

Table of Contents

### **Section 2: General Norms for the *Pastoral Handbook 2***

### **Section 3: General Administration**

Administration: General Norms for Parish Office	3
Accident Prevention	3
Alcohol Use at Parish Functions	5
Building Guidelines (General)	5
Remodeling and Demolition	7
Census and Parish Statistics	8
Communication	8
Curia	8
Establishment of Outreaches, Missions and Parishes	
Establishment of an Outreach	9
Establishment of a Mission	9
Establishment of a Parish	11
Eparchial Fees and Stipends	11
Stipend Guidelines	12
Fees for Extra/Supply Priests	13
Inventories	14
Church	14

<i>Inventories continued</i>	
Personal Property	14
Loans	14
Parish Advisory Council	15
Parish Archives (General and Retention Schedule)	17
Liturgical Documents	18
Pastor's Personal Documents	18
Sacramental Register	18
Recording of Baptisms for Adopted Children	20
Political Activities on Church Property	21
Political Endorsements	21
Financial and Other Support	22
Partisan Literature	22
Candidate's Appearance	22
Candidate Surveys	22
Voter Education	22
Property: Accepting Gifts	22
Property: Purchase/Sale	23
Rectory	24
Safe Environment	25
Use of our Churches	25
Non-Christian and Non Catholic Use	25
Catholic Churches	26
Visitation of the Eparchial Bishop	27
Visitation of the Protosyncellus and/or Eparchial Finance Officer	27
<b>Section 4: Financial Administration</b>	
Cathedraticum (General)	29
Calculating the Cathedraticum	29
Cathedraticum Exemptions for Specific Accounts	30
Cathedraticum for Non-designated Gifts, Bequests....	31
Cathedraticum for Restricted Gifts, Bequests and Donations	32
Special Collections	32
Bishop's Appeal	33

Financial Accountability (General)	34
Eparchy	35
Parishes/Missions/Outreaches	35
Parish Organizations	37
Segregation of Financial Responsibilities	37
Taking & Counting the Sunday Collection	39
<b>Section 5: Clergy</b>	
Appointment of Priests	41
Bi-Ritual Indult and Eparchial Faculties (General)	41
Procedure for Requesting a Bi-Ritual Indult for the 1 <sup>st</sup> Time	42
Renewal of Bi-Ritual Indults/Faculties	43
Granting Faculties to Priests Having a Byzantine Indult	44
Compensation of Priests (General)	44
Salaries	45
State and Federal Taxes	45
Social Security	46
Benefits	46
Retirement Fund	46
Health Insurance	46
Automobile Insurance	46
Telephone Calls/Household Expenses	46
Reimbursement Moving Expenses	47
Reimbursement for Eparchial Services	47
Eparchial Clergy Functions	47
Bonus and Parish Appreciation	47
Newly Ordained Priests and Deacons	48
Priestly Anniversaries	48
Continuing Formation of Clergy	48
Deacons (General)	48
Liturgical Role of the Deacon	49
Visiting Deacons	50
Requesting a Deacon from Another Parish Within Eparchy	50
Transfer and Enrollment of Deacons	51
Leave of Absence	51
Clerical Attire	52
Proper Courtesy	52

<i>Deacons continued</i>	
Bi-Ritual Deacons	53
Death of a Priest/Deacon (General)	53
Liturgical Observances: Deceased Bishop/Priest/Deacon	54
Enrollment Incardination and Service in the Eparchy	54
Medical and Disability Leaves of Priests	56
Pastoral Leadership (General)	57
Personal Spirituality	58
Liturgical Responsibility	58
Spiritual Guidance	59
Pastoral Skills	59
Pastoral Attire	60
Pastor's Responsibilities (General)	60
Finances	60
Physical Plant	60
Real Estate	61
Risk Management/Insurance	61
Legal Issues	61
Physical Safety of Clergy and Religious	62
Retirement (General)	63
Priests' Retirement Fund	63
Vacations and Days Off	64
Wives of Clergy	65
<b>Section 6: Lay Persons</b>	
Lay Persons in General	66
Membership in a Parish	66
Transfer of Ritual Church (General)	68
Procedures	69
Transfer of Ritual Church at Marriage	71
<b>Section 7: Worship</b>	
Burial and Cremation	72



Fasting Regulations (General)	72
Simple Fast or Abstinence	73
Strict Fast	73
Age Requirements	73
Dispensations	73
Non-Fasting Periods	74
General Liturgical Directives	74
Directives for Divine Liturgy	75
Liturgical Directives for the Great Fast	77
Liturgical Directives for Holy Week	77
Liturgical Directives for Pascha and Bright Week	79
Liturgical Directives for Pentecost	80
Other Services	80
Holy Mysteries	80
Holy Mysteries of Christian Initiation	80
Chrismation	83
Eucharist	83
Reconciliation	83
Crowning in Marriage	83
Anointing of the Sick	85
Holy Orders	85

## **Section 8: Care of Vocations**

Care of Vocations in General	86
Candidates for Ordained Ministry	87

## **Section 9: Index**

## **Section 10: Appendix A: Corporate Documents**

## **Section 11: Appendix B: Kenedy Directory & Group Ruling**

## **Section 12: Appendix C: Chart of Accounts for Parishes**

**Section 13: Appendix D: Safe Environment Documents**

**Section 14: Appendix E: Index to Eastern Code of Canon Law**

**Section 15: Appendix F: Other Documents/Updates**

### **Abbreviations**

**Canon:** *Code of Canons of the Eastern Churches*

**MPL:** *The Norms of the Particular Law of the Byzantine Catholic Metropolitan Church sui juris of Pittsburgh*

## **General Norms for the *Pastoral Handbook***

1. Included in the designation "particular law" are all the laws, legitimate customs, statutes, and other norms of law which are not common to the universal Church or to all Eastern Churches (Canon 1493, #2).
2. Unless otherwise stated, these Norms and Directives issued in this *Pastoral Handbook* are binding on the clergy, religious, and laity within the Holy Protection of Mary Byzantine Catholic Eparchy of Phoenix, from here on known in this text as the Eparchy of Phoenix.
3. All Memoranda and Guidelines issued prior to this *Pastoral Handbook* are hereby abrogated, except those which are part of the *Particular Law of the Byzantine Catholic Metropolitan Church sui juris of Pittsburgh*.
4. The norms of the *Code of Canons of the Eastern Churches*, of universal law, and of the *Particular Law of the Byzantine Metropolitan Church sui juris of Pittsburgh* will supersede any particular law of this Eparchy to whatever extent they contradict each other.
5. It is the responsibility of the Eparchial Bishop, and the Regional Syncellus if one has been appointed, to see that the *Pastoral Handbook* is implemented in each of the parishes.
6. Pastors are to see to it that matters in this *Pastoral Handbook* which affect their faithful are brought to their attention.
7. A copy of the *Pastoral Handbook* is to be kept with the parish records in such a way that it can be easily consulted by the Pastor. At least one additional copy is to be accessible to the faithful.
8. The clergy, religious and faithful of the Eparchy, keeping in mind the salvation of souls and the good of the Church, are to offer suggestions for revisions and new matters which seem to them important to include in the *Pastoral Handbook*. Revisions and suggestions are to be sent to the Eparchial Bishop.
9. Every three years or as needed, a review of the *Pastoral Handbook* by the Presbyteral Council under the direction of the Eparchial Bishop will serve to evaluate its effectiveness and to recommend modifications and inclusions.
10. The Eparchial Bishop of Phoenix is the sole authentic interpreter of, and the sole authority to amend the *Pastoral Handbook*.

11. The Eparchial Bishop governs the Eparchy with legislative, executive and judicial power. (Canon 191)
12. Whatever is stated here in reference to a *Pastor* also applies to a parish *Administrator* unless otherwise specified.
13. Whatever is stated here of a *parish* applies also to a *mission* unless it appears otherwise.

## **Administration: General Norms for Office**

14. Every parish is to have an official seal, which is to be kept in good condition by the pastor. The seal should be used only by the pastor or other authorized persons. When not in use, it is to be kept in the safe with the parish registers.
15. Every parish must have an immovable fire-proof safe or cabinet in which are kept important parish documentation: sacramental register, parish census, parish financial reports, blank checks, CD's, incorporation documents, parishioners' contributions, deeds, loan documents, backed up discs, etc.
16. Pastors are to take care that extra keys, combinations and passwords are secure.
17. An extra key to these cabinets, safe combinations or computer passwords should be forwarded to the Pastoral Center for safe keeping. These should be kept current by the pastor.
18. The Eparchial Bishop is to have signature on all parish bank accounts and safety deposit boxes opened on behalf of the parish.
19. Each parish is to have a computer:
  - a. that is maintained in a secured area and on which parish records are kept;
  - b. that is not for personal use or excessive exposure to the internet;
  - c. that is backed up weekly if, not daily, and the backup stored in the parish safe or in a secured place in another parish building.
20. All eparchial entities will operate on the calendar year (January 1—December 31) for budgeting and reporting purposes.

## **Accident Prevention**

*Accidents are painful, costly, and usually preventable. In order to prevent possible litigation against the parishes and the Eparchy, the following directives are given to assist in preventing accidents on church property:*

21. Pastors should cooperate with the eparchial insurance company regarding accident prevention programs and accident reporting.

22. Identify and remove hazards that could cause people to trip or slip or fall. Snow, sand and debris must be either neutralized or removed immediately from all walkways and parking facilities.
23. Examine parish buildings, walkways, stairways and parking lots for uneven or slippery surfaces. Make repairs as necessary and as soon as possible.
24. Check that ramps and stairs have adequate handrails and slip-free treads and are in compliance with city, county, state, and federal regulations.
25. Make sure that parking lots, walkways, stairs, and buildings are well lit with care to replace burnt out lights as soon as possible.
26. The parish church and hall should be outfitted with emergency lighting and exit signs in accord with local ordinances. This lighting should be inspected periodically to ensure that it is working properly.
27. Smoke detectors must be fastened with screws to walls or ceilings—not glued—and the batteries changed annually. Smoke, carbon monoxide and radon gas detectors must be placed in strategic areas in all buildings and in accordance with civil law.
28. Pastors should also check for unsafe materials stored near boilers and water heaters. Flammable materials should not be kept in buildings for safety reasons.
29. Fire extinguishers should be located in critical and accessible areas in buildings and should be inspected annually by authorized agencies.
30. Provide adequate mats at building entrances inside/outside during wet weather.
31. Make provisions for mopping up water that is tracked into buildings, as well as food and beverage spills.
32. Carpet holes should be patched or carpet replaced to prevent accidents.
33. Annual and monthly safety checks should be made by the pastor and/or those responsible for church maintenance, using forms provided by our insurance agents. Corrective actions should be addressed immediately, using the forms provided by the insurance agency. These should be signed and dated and kept in the parish files

## **Alcohol at Church Functions**

34. The serving of alcoholic beverages at parish functions is **strongly** discouraged.
35. If alcohol is deemed a part of the function, the pastor has the serious obligation to enforce the following:
  - a) If there is a bar set up, licensed bartenders who are at least 21 years of age should be present at all times and should not consume alcohol while they are working;
  - b) Persons under the legal drinking age limit are not to be served;
  - c) Only wine and/or beer should be served, never hard liquor or mixed drinks;
  - d) Care should be taken that moderation in drinking is enforced and that those who are exhibiting signs of inebriation are cut off;
  - e) A person who shows signs of being impaired should be driven home;
  - f) No alcohol is to be taken off the premises;
  - g) Alcohol should not be given away as a prize.
36. Every precaution must be taken to prevent litigation against the parish, Eparchy and individuals.

## **Building Guidelines**

*The following directives are given to facilitate the process for construction, major renovation and demolition of parish facilities:*

37. Any renovations, alterations and changes in the sanctuary, major appointments and iconostas in a church or chapel cannot be undertaken without the written consent of the Eparchial Bishop.
38. The selection of iconographers for a church or chapel must be preapproved by the Eparchial Bishop in writing. To facilitate the selection of an iconographer, a sample of his/her iconography must be submitted to the Eparchial Bishop.

39. The pastor shall meet with the Parish Advisory Council/Finance Council, and if he determines it appropriate, with the entire parish membership to discuss the necessity of any proposed construction or demolition project. This should be recorded in the minutes with a copy sent to the Eparchial Bishop. Only the Eparchial Bishop can approve construction and demolition projects.
40. It will pertain to the pastor, after having consulted the Parish Advisory Council, to determine the financial feasibility of the project, taking into account the financial situation of the parish, zoning requirements, city codes, etc. Past and current parish indebtedness must be reviewed and /or resolved before permission is sought from the Eparchial Bishop before proceeding with the project.
41. Normally, fifty percent (50%) of the project's cost should be available in parish funds before a project is undertaken.
42. If necessary, experts such as engineers and architects can be consulted, but contracts cannot be entered into for an amount exceeding \$5,000.00 without the written permission of the Eparchial Bishop
43. Preliminary information is then to be presented in writing to the Eparchial Bishop for his written permission to proceed with the more specific details of the project.
44. The following steps are to be observed in the building process:
  - a) For major construction projects, the Eparchial Bishop or his delegate should visit the parish to review the proposed project.
  - b) Permission to enter into contracts with an architect/engineer must be requested in writing and approval obtained in writing from the Eparchial Bishop.
  - c) Preliminary architectural drawings must be submitted to the Pastoral Center for review by the Eparchial Building Commission and to receive the approval of the Eparchial Bishop.
  - d) Final architectural plans, specifications must be submitted to the Eparchial Bishop for approval which shall be given promptly.
  - e) If the final plans are approved, a minimum of three (3) bids must be obtained and submitted to the Eparchial Bishop for selection after hearing the opinion of the pastor and parish advisory board.



- f) Permission to enter into any change of orders and any changes in design must be preapproved by the Eparchial Bishop.
45. All contracts must be sent to the Pastoral Center for the signature of the Bishop. Unless specifically provided in writing, no person can act as the agent of the Eparchial Bishop. Any contract or agreement entered into otherwise is void and the Eparchy and parish are not responsible.
  46. All architectural plans, blue prints, and specifications must be preserved in the parish archives and a complete set must be submitted for retention to the Pastoral Center.
  47. It is the responsibility of the pastor to see that adequate liability and workman's compensation is carried by the contractor and a certificate of insurance is provided to the pastor. The church's insurance company should be notified and comprehensive insurance must be purchased for the building project and the Bishop. The "Byzantine Catholic Bishop of Van Nuys, a Corporation Sole" is to be included as an insured party.
  48. After construction is completed
    - a) The construction company must obtain all necessary permits, inspections and certificates for occupancy from the local government. These must be given to the parish and a copy to the Eparchy, especially the certificate of occupancy.
    - b) During the contractor's one year warrantee period, the architect shall conduct a ten month inspection to determine if guaranteed items need attention. He is to see to their completion by the contractor or responsible party.

### **Remodeling and Demolition**

49. The following directives are to be observed in regards to remodeling projects in excess of \$5,000.00 (five thousand dollars):
  - a) Remodeling and demolition which involves substantial physical demolition/construction must follow the above mentioned procedure for new buildings, even if the material and/or services are donated by individuals or organizations.
  - b) Remodeling which changes the use of an area, especially worship space, requires prior written approval of the Eparchial Bishop.

## **Census and Parish Statistics**

*The purpose of a census is to ascertain the number of the faithful, their needs and the resources available to set goals and give direction for future planning. Also a constant updating of the parish census is important so that the Pastoral Center can give accurate information to the publishers of the Kenedy Directory and the annual report to Rome.*

50. The Kenedy Directory census must be completed each year. According to the annual group ruling of the Internal Revenue Service, inclusion in The Official Catholic Directory published by P.J. Kenedy and Sons accords federal tax exempt status to a church entity and as a charitable organization able to issue charitable contribution forms for IRS purposes.
51. The local Pastor is strictly obligated to participate in the census.
52. The month for gathering statistical information is September. Pastors should use October 1<sup>st</sup> of the previous year to the end of September of the current year for gathering the requested statistical information regarding the Holy Mysteries. (See also # 428.)
53. Pastors are to see that reports are completely and accurately filled out and submitted promptly by the date given on the census form. There are no exceptions.

## **Communication**

54. To facilitate communication with the Pastoral Center, each parish is to have a confidential and dedicated FAX line or have a confidential e-mail accessible by the pastor only. Fax machines and emails should be checked daily in the morning and late afternoon.
55. Each parish is to maintain a website that contains the address of the church, a list of services, etc. under the control of the pastor. The website should be current and follow the requirements of the Safe Environment Guideline.

## **Curia**

56. The Eparchial Bishop has the right and obligation of appointing clergy, religious and laity to assist him in the administration of the Eparchy. These curial offices and their obligations are governed by CCEO Canons 243-278 and in the *Metropolitan Particular Law* 252 #1 and 266.

## **Establishment of Outreaches, Missions and Parishes**

### **Establishment of an Outreach**

57. The core group of Byzantine Catholics interested in committing themselves spiritually and financially to the possible establishment of an Outreach must first be identified.
58. The faithful can proceed to submit a written request to the Eparchial Bishop for a priest to visit on an occasional basis.
59. In evaluating the feasibility of providing the community with occasional pastoral care, the Eparchial Bishop will consult with the closest pastor.
60. If recognition of the community is deemed feasible, the Eparchial Bishop will appoint a priest to serve the Outreach on an occasional basis and stipulate the various details regarding its pastoral care and administration.
61. No patron saint will be assigned to the Outreach. The community shall be identified as the *Byzantine Catholic Outreach of* (Name of City or County).
62. Periodic evaluations will be made regarding the present and future viability of the Outreach based on the assigned priest's reports submitted to the Eparchial Bishop.
63. Collections and donations are under the control of the assigned priest and one or two lay members of the Outreach. Ecclesiastical records are also kept by the assigned priest at his parish.

### **Establishment of a Mission**

64. The priest and the Outreach can request the Eparchial Bishop to establish a mission. Request for mission status should include information regarding the community's membership, spiritual and financial situation and potential for growth.
65. To establish a mission
  - a) The core group must number at least 15 committed and active family units.
  - b) There must be a priest to celebrate the Divine Liturgy every Sunday.

- c) There must be sufficient potential for growth and development of the Outreach.
  - d) The Outreach must be able to assume the priest's travel expenses and stipend.
66. The Presbyteral Council shall review the information and render an opinion as to whether a mission should be established.
67. If the Eparchial Bishop makes a decision to establish a mission canonically, he will determine the name of the mission (saint or feast) after having consulted the Outreach, and he shall appoint a priest to serve the needs of the Outreach as Mission Administrator.
68. The Mission shall be administered in the following manner:
- a) The Mission must have at least a temporary place of worship.
  - b) A worship schedule is to be maintained for every Sunday and, if possible, major holydays.
  - c) The priest will establish a Mission Advisory Council in conformity with the approved model for Parish Advisory Councils, adapting when necessary and with the Eparchial Bishop's approval.
  - d) The Mission will maintain its own sacramental and separate financial records in the parish of the Mission's Administrator.
69. When financially feasible the Mission is to purchase suitable property for future development for a church, rectory and meeting facilities appropriate to its needs.
70. The Mission will be visited by the Eparchial Bishop in a manner like the parishes.
71. After five years the Mission Administrator will submit a report to the Eparchial Bishop regarding the viability of the Mission.
- a. If the Mission is evaluated as being viable, consideration will be given as to when it should be canonically established as a parish.
  - b. If the mission shows sign of growth but needs more time to mature, the Eparchial Bishop will permit the mission to continue and call for another review within the next five years.

- c. If the Mission is not deemed viable, the Mission is to be closed and the sacramental and financial records and accounts are to be sent to the closest parish.

**Establishment of a Parish**

- 72. If it seems that the mission is ready to become a parish, the mission administrator and the mission advisory council may petition the Eparchial Bishop who, having heard the opinion of the Presbyteral Council, will inform the mission administrator of the decision.
- 73. To be established as a parish:
  - a) The Mission must show sufficient evidence of maturity in the realm of spiritual, physical and financial growth;
  - b) The number of actively participating family units must be at least twenty-five.
  - c) The Mission must be financially capable of:
    - 1) Establishing and maintaining a permanent facility for worship and activities;
    - 2) Providing a residence, salary, subsistence, benefits and legitimate expenses for a full-time priest;
    - 3) Meeting all financial obligations related to being a parish.

**Eparchial Fees and Stipends**

*According to Canon 1013 § 1, the Bishop has the right to fix the tax for the various acts of governance within the Eparchy.*

- 74. The following fees are in effect for the Eparchy of Phoenix:
  - a) Antimension: Payable to the Eparchy
    - 1) Eparchial parishes: \$100.00
    - 2) Outside requests: \$200.00
  - b) Canonical Visitation by the Bishop  
Eparchial Pilgrimage No fee
  - c) Anniversaries & Special Occasion  
Stipend to Bishop or His Delegate Travel & Lodging: Parish  
\$250.00

- d) Visitation by the Protosyncellus or Finance Officer: No Fee
- f) Tribunal Fees (ALL fees must accompany each petition. Occasionally other expenses may be incurred.):
- |   |          |
|---|----------|
| 1) Lack of Form                                   | \$100.00 |
| 2) Dispensation from Canonical Form               | \$100.00 |
| 3) Mixed Religion                                 | \$50.00  |
| 4) Disparity of Cult                              | \$50.00  |
| 5) Declaration of Nullity (Annulment)             | \$500.00 |
| 6) Transfer of Ritual Church (18 years and older) | \$75.00  |
| Family of three or more                           | \$150.00 |
| 7) Ligamen  | \$200.00 |

### **Stipend Guidelines**

75. It is customary for the faithful to offer a donation for specifically requested liturgical services. Many times it happens that the faithful want a suggested offering for a particular service.
76. The figures listed below are only suggestions. It is clearly understood that these figures do not constitute fees for these services. The faithful are free to give less or more according to their own desire.
77. None of these spiritual benefits can be ever denied anyone solely because of their unwillingness to make a donation.
78. The priest will accept whatever stipend is given without question.
79. For the common good, stipends are to be accepted by the priest.
- a) Stipends given for Divine Liturgy intentions must be persolved in the parish unless the donor specifies differently;
- b) Should an individual priest not want to keep stipends offered for other services, he is free to give them to the parish or to his favorite charity
- c) Mirovanije collection is to be used by the priest as he sees fit.

80. Cantors do not share in those stipends for the Divine Liturgy.
81. The following are the **recommended** stipends for liturgical services in the Eparchy of Phoenix:

	<b>Service</b>	<b>Stipend</b>	<b>To whom</b>
a)	Divine Liturgy	\$10.00	Priest
b)	All Souls Saturdays	Whatever offered	Priest
c)	Pre-Sanctified Liturgy	\$10.00	Priest
	<u>Please note:</u> <i>The name of the person to be remembered in the Pre-Sanctified Liturgy must be prayed for aloud and by name in one of the Litanies.</i>		
d)	Baptism	Whatever offered	Church/Priest
e)	Wedding	\$500.00 \$250.00 \$50.00	Church Priest Per Cantor
f)	Funerals (Vigil, Liturgy, Burial)	\$150.00 \$100.00 \$50.00	Church Priest Cantor
g)	Panachida/Moleben	Whatever offered	Priest
h)	Blessing of Homes	Whatever offered	Priest

#### **Fees for Extra/Supply Priests**

82. On Sundays and Major Holydays when it is necessary to obtain a substitute priest, the parish will pay \$75.00 for the first Divine Liturgy celebrated and \$50.00 for each additional Liturgy. These stipends include the hearing of Confessions, if that be the custom. The substitute priest will also receive the Liturgy intention stipend(s) and be reimbursed his travel expenses.
83. For weekday Divine Liturgies, the substitute priest is entitled only to the Liturgy intention stipend.
84. If it is deemed advantageous to the parish or mission that additional clergy be brought in for the celebration of Penance Services or the

hearing of Confessions, such priests are to receive a \$50.00 stipend from the parish or mission.

85. For traveling expenses the cost per mile driven should be based on the prevailing rate established by the Internal Revenue Service. This can be found at [irs.gov](http://irs.gov).

## **Inventories**

### **Church**

86. Every parish is to have an inventory of all moveable goods which belong to the parish. This inventory is to be done building by building and room by room and is to be kept current.
87. One copy is to be kept in the parish files and another is to be sent to the Pastoral Center.

### **Personal Property**

88. Each priest is to make a written inventory of the personal possessions that he has with him in the rectory, office and church. This inventory is to be kept current. It is advisable that photographs be taken of said possessions.
89. One copy is to be retained by the priest and one copy sent to the Pastoral Center for the priest's personnel file.
90. If it happens that the priest dies while serving at a parish or mission, any property not listed on his personal inventory kept at the Pastoral Center will be considered parish property. Any item that has a label or can be identified by a mark on the item is excluded and belongs to the estate of the priest.

## **Loans**

91. A parish needs the approval of the Eparchial Bishop to obtain a loan for any amount, for any length of time with any institution.
92. Whenever possible, loans should be obtained from the Eparchy or from another parish within the Eparchy. (See also # 215, 278)



93. The criteria for granting permission to obtain a loan are the following:
- a) The parish responsibilities to the Eparchy are current (Cathedraticum, medical insurance, and priest pension contributions);
  - b) The parish has made its Bishop's Appeal goal for the last 2 years;
  - c) The Bishop's last Visitation Report is being/has been implemented;
  - d) The cash flow of the parish is adequate to support the loan payments;
  - e) A complete and total repayment plan of the capital and interest must be submitted to the Eparchial Bishop.
94. To obtain a loan, the agreement must be signed by the Eparchial Bishop or his designated delegate to be valid.
95. Normally the rate of interest charged by the Eparchy on loans will be lower than the prevailing interest rate of secular financial institutions.

### **Parish Advisory Council**

*In the parish there are to be appropriate councils dealing with pastoral and economic matters, according to the norm of the particular law of its own Church sui juris." (Canon 295)*

96. Each parish is to have an Advisory Council to assist the pastor with the pastoral, economic and social needs of the parish.
97. One of the Council's responsibilities is to set up and review the annual operational budget, review the parish finances quarterly; and to make recommendations to the pastor regarding the financial concerns of the parish or mission.
98. The ex-officio members of the Parish Advisory Council are the pastor, the parochial vicar, the deacon(s) and the Parish Financial Administrator if one has been appointed by the Eparchial Bishop.
99. The lay members of the Council are nominated by the pastor and confirmed by the Eparchial Bishop for a three year term. Council members may be reappointed.

100. If a lay member of the Council ceases to hold office through resignation or death, the pastor will submit the name of another lay person to the Eparchial Bishop for approval. The new member will finish the term of the replaced member.
101. The lay members of the Parish Advisory Council will consist of at least five lay persons who shall represent both genders, the various ministries of the parish and various age groups.
102. Those nominated to the Parish Advisory Council are to be:
  - a) Communicants who regularly attend Sunday and Holyday Divine Liturgies;
  - b) Active parishioners involved in the life of the community for at least one year prior to their nomination;
  - c) Parishioners who love their Church and demonstrate good judgment and are knowledgeable in their field of expertise.
  - d) Parishioners eager to support and promote the parish's spiritual, educational, charitable, financial and social life by direct involvement;
  - e) Parishioners who are respected by the parish community.
103. The pastor is the ex-officio chairman of the Parish Advisory Council.
104. The pastor will appoint a Council member to serve as secretary and to take minutes which are to be preserved in the parish archives.
105. The Council will meet regularly—at least quarterly. The pastor must be present for each meeting.
106. The decisions of the Council are **advisory only**, and not binding on the pastor of the parish.
107. The Bishop will meet with the Council during the canonical visitation. He may review the minutes of the Council and sign the latest entry.
108. The Protosyncellus and/or Eparchial Finance Office will also meet with the Council if they visit in the name of the Bishop.
109. When a pastor is transferred, the Parish Advisory Council ceases after the first meeting with the new pastor. The new pastor may elect to retain them for a period or establish an entirely new Council. The new pastor

should communicate his decision in writing to the Eparchial Bishop within three months of assuming leadership of the parish or mission.

### Parish Archives

110. Pastors are gravely bound to have and keep current the approved books and documents relating to the temporal and spiritual life of the parish or mission.
111. The following books are to be kept in a secured and fireproof cabinet in the pastor's office as part of the parish archives:
- a) The Sacramental Register(s);
  - b) Death Register;
  - c) *The Code of Canons of the Eastern Churches*;
  - d) *The Norms of the Particular Law of the Byzantine Catholic Metropolitan Church sui juris of Pittsburgh*;
  - e) The Pastor's copy of *Pastoral Handbook of the Eparchy of Phoenix* (another copy is to be kept in the parish hall for parishioners to consult);
  - f) Sick Call Register.

112. The following is a list of records that must be kept and the length of retention:

Accident reports and claims (settled cases)	7 years
Bank Statements (checking, savings, investment accounts)	Permanently
Chancery Correspondence (general)	3 years
Chancery correspondence regarding parish with Protocol Number	Permanently
Checks only if returned by the bank :	
*Checks: normal and routine operating expenses)	4 years
*Checks other than normal and routine expenses	7 years
*Checks (Important payments: real estate and other taxes, equipment or property purchases; anything still under warranty; loan or mortgage payments, special contracts)	Permanently
Contracts and leases (expired)	7 years
Contracts and leases (still in effect)	Permanently
Correspondence: letters, faxes (general)	2 years
Correspondence: legal, disputes, conflicts, complaints	Permanently
Directory of names, addresses, phone numbers of Parishioners	Kept Current

Deeds, mortgages, bills of sale, zoning rulings (original documents should be in the Pastoral Center)	Permanently
Donations (Financial Contribution)	7 years
Donation: Major Contribute for specific use	Permanently
Duplicate deposit slips	4 years
Employee personnel records (after termination)	7 years
Financial Statements (monthly Cathedraticum statements)	Permanently
Financial Statements (annual, published in bulletins)	Permanently
Insurance policies (expired, no pending claims)	7 years
Insurance record (accident and property claims, accident reports, police reports, pending claims)	Permanently
Inventory lists (parish furnishings, fixtures, equipment) (separate personal and parish possessions)	Permanently
Invoices from vendors (normal and routine operating expenses)	Keep current
Invoices from vendors (other than normal and routine expenses)	4 years
Invoices from vendors (important payments, real estate and other taxes, equipment or property purchases, anything still under warranty)	7 years
Minutes Books: Parish Advisory and Finance Boards	Permanently
Parish Bulletins (historic value)	Permanently
Pastor's Account Book	Permanently
Payroll records and summaries	7 years
Petty cash vouchers	3 years
Property appraisals, survey, blue prints, plot plans	Permanently
Tax returns and correspondence (payroll taxes, real estate taxes, any tax correspondence from local, state or federal)	Permanently

### Liturgical Documents

Baptism, Marriage and Death Records	Permanently
Cemetery/Columbaria plot plans, plot payments, plot deeds, etc.	Permanently
Change of Ritual Church records (recorded in Baptism register)	Permanently
Divorce and annulment records	Permanently

### Pastor's Personal Documents

Personal property inventory at parish (complete and current)	Permanently
Stipend books (persolved)	7 years
Stipend books (unpersolved)	Permanently

### Sacramental Register

113. The pastor is responsible for keeping the Sacramental Register current and making the appropriate entries as soon as possible after the Holy Mystery has been received. (See also # 541 and Canons 296 and 689)

114. The following must be recorded in this Register:

- a) Holy Mysteries of Christian Initiation (Baptism, Chrismation and Eucharist);
- b) Reception into the Church by Profession of Faith (Baptismal Register);
- c) Transfers of Ritual Churches (Baptismal Register);
- d) Marriages;
- e) Deaths.

115. Concerning the Sacramental Register, the following are to be observed:

- a) Copies of records certifying the conferral of a Holy Mystery, or a statement that no such record exists, should be supplied without charge only to the individual concerned or under circumstances that are not prejudicial to his/her interest.
- b) Copies of records shall be denied to all other parties except when said parties are permitted by ecclesiastical or civil law to have access to them.
- c) When copies of records are subpoenaed by civil authorities, the Pastoral Center is to be consulted before any action is taken.
- d) When the record certifying the conferral of a Holy Mystery has been destroyed or lost, an affidavit testifying that the Holy Mystery was conferred shall be required from a witness to that event. An entry is to be made in the appropriate register indicating the affidavit as the source. The affidavit must be kept in the parish files.
- e) Copies of official records should be made only by the pastor, parochial vicar or deacon, keeping in mind the necessity of complete confidentiality. The record must bear the personal signature of the cleric and the parish seal.
- f) Under no circumstances may unauthorized persons have access to official parochial records.
- g) If a person requests a record to be modified for reasons such as adoption, the Pastoral Center is to be consulted. A court mandate signed by a judge must be presented by the parents.

## **Recording of Baptisms for Adopted Children**

116. For children baptized after their adoption is finalized, the following information shall be entered into the Baptismal Register:
  - a) The Christian name(s) of the child as designated by the adoptive parent(s);
  - b) The names of the adoptive parent(s);
  - c) The date and place of birth;
  - d) The names of the sponsors selected by the adoptive parent(s);
  - e) The place and date of the Baptism;
  - f) The name of the priest performing the Baptism;
  - g) The fact of adoption, but not the names of the natural parents, in the notations.
117. Baptismal certificates issued by the parish for adopted children will be no different from other baptismal certificates.
118. No mention of the fact of adoption shall be made on the baptismal certificate.
119. For children baptized before their adoption is finalized, the following notations shall be added to the baptismal register, but only after the adoption has been finalized and with due regard for the civil law of the jurisdiction:
  - a) Parentheses shall be placed around the name of the natural parents;
  - b) The names of the adoptive parent(s) shall then be added;
  - c) The child's former surname shall also be parenthesized and the new surname added;
  - d) A notation shall be made that the child was legally adopted.
120. Baptismal certificates issued by the parish for these individuals shall give only the names(s) of the adoptive parent(s), the child's new legal surname, the date and place of baptism, and the name of the minister who conferred the Holy Mystery. The names of the sponsor(s) shall not

be given, and no mention of the fact of adoption shall be made on the baptismal certificate.

121. For future ease in reference, and to afford what may often be the only possibility of reference after the adoption has been finalized, a baptismal entry for the adopted child can be made in the baptismal register of the adoptive parents' parish, citing the date and location of the original baptismal record in the notation. (See also # 116.)
122. Parish personnel having access to parish registers have an obligation not to disclose to any person any information that would identify or reveal, directly or indirectly, the fact that a person is adopted.
123. All ecclesiastical registers and records are the property of the parish and cannot be removed without the written permission of the Eparchial Bishop. Current and old registers are to be kept in a secured and fire proof container.

### **Political Activity on Church Property**

124. In order to protect the parish's tax-exemption status, it is essential that federal regulations regarding political activities be observed.
125. If a religious or charitable corporation participates in a political campaign, it not only loses tax exemption on all its properties, but its members are denied the right to take a deduction for their contributions to that religious or charitable corporation. It is, therefore, important that each parish take care to follow the instructions given below:

#### **Political Endorsements**

126. Neither the pastor nor any member of the parish may endorse a political candidate in the name of the parish. This includes postings on any parish web site.
127. They may not encourage votes for or against any candidate by means of a sermon, parish bulletin, web site, or sample ballot. This includes indirect statements, such as labeling a candidate pro-abortion.
128. Campaign posters may not be displayed on Church property.

### **Financial and Other Support**

129. The parish may not provide financial or any type of campaign support (such as providing volunteers or facilities) to any candidate or party, nor establish or support a political action committee.

### **Partisan Literature**

130. Campaign literature cannot be distributed on church property. However, the church does not control access to public property, such as streets outside the church property.

### **Candidate's Appearance**

131. If a meeting is held on church property or other tax exempt property owned by the Eparchy where a candidate is to appear, all other candidates must be given a reasonable opportunity to appear at the same meeting, or have the opportunity to use the church property on another occasion, otherwise we seriously jeopardize our tax exemption.
132. If the parish hall is rented to one party, the parish hall must be make available to other parties, if they so desire.

### **Candidate Surveys**

133. The parish may not sponsor any candidate surveys.

### **Voter Education**

134. Churches are not to permit the use of their facilities to distribute newsletters, pamphlets or surveys that include candidate's statements or voting records or the results of candidate polls or questionnaires.
135. In case of doubt, see [www.usccb.org/ogc/guidelines.shtml](http://www.usccb.org/ogc/guidelines.shtml)

### **Property: Accepting Gifts**

136. Gifts of real property are encouraged and accepted as long as the terms for acceptance are not in conflict with Canonical Law, Eparchial Directives, morality concerns or civil restrictions.
137. In general, property which is encumbered with debt is to be declined.



138. Property should normally be free from donor-imposed restrictions concerning its use.
139. If property is offered for a specific purpose, the pastor may not accept it without the written permission of the Eparchial Bishop.
140. The Eparchy will accept and honor any donor request that the net sale proceeds of a donated property be given to or used for the benefit of a particular parish or a specific eparchial need such as the Seminarian Fund, Priests' Retirement, Development, etc.
141. The name in which the Eparchy takes title to donated real property is the *Byzantine Catholic Bishop of Van Nuys, a Corporation Sole*.
142. The subsequent use or sale of donated property must have the written permission of the Eparchial Bishop.

### **Property: Purchase/Sale**

143. The pastor meets with the Parish Advisory Council to
  - a) Study the needs of the parish in relationship to its further growth and development;
  - b) Study how the proposed property meets that growth and development;
  - c) Review the specifications, zoning, asking price for the property;
  - d) Ask for a recent survey of the proposed purchase from the owner or commission a survey;
  - e) Gets real estate quote from comparable properties in the area;
  - f) Order a title search for the property.
144. The pastor prepares a current financial report of the parish's income, expenses, debt, and saving which covers the current year and the last three years.
145. The pastor presents this information to the Parish Advisory Council for review and discussion in light of the proposed purchase or sale.

146. After consulting the Parish Advisory Council, the pastor requests permission from the Eparchial Bishop to continue the process. He sends the necessary documentation regarding the proposed property, the parish's finances, the parish's financial ability to purchase the property, and the reasons for the purchase or sale to the Eparchial Bishop.
147. The Finance Officer or a representative appointed by the Eparchial Bishop is sent to the parish to:
  - a) View the proposed property with the pastor and the real estate agent;
  - b) Review the financing of the project with the pastor;
  - c) Meet with the pastor and the Advisory Council to discuss the need for the property and the parish's financial ability to purchase the property or the reasons to sell the proposed property.
148. The Finance Officer or representative submits a written report to the Eparchial Bishop in a timely manner.
149. The Eparchial Bishop then grants or denies permission for the purchase or sale of the property.
150. The Eparchial Bishop must sign all agreements of purchase/sale and closing documents.

### **Rectory**

151. All priests are to reside in the rectory or designated house supplied by the parish or ministry unless the Eparchial Bishop gives them written permission with stated conditions regarding living elsewhere.
152. Priests are to be provided with comfortable and private living quarters that are simple, clean and properly furnished.
153. Priests are to show hospitality to their brother priests.
154. The clergy residing in the rectory are to see to its cleanliness and upkeep.
155. When a priest is transferred, he is to see that his successor will have all the necessary amenities in the residence and ensure that it is clean and orderly.

156. Priests are not to have unaccompanied minors in their living quarters at anytime, even if they are blood relatives. This does not apply to married priests with children.
157. Resident housekeepers, relatives, friends or acquaintances of a priest are not to live in the rectory with the priest without the written permission of the Eparchial Bishop.
158. Priests are entitled to have guests visit and even to stay overnight, as long as this is not a permanent situation and lasts no more than a month. For a stay longer than one month, the written permission of the Bishop is required.
159. Parents of a priest may reside with their priest-son only with the written permission of the Eparchial Bishop. It is understood that a parent living in the rectory is not to take the priest away from his parochial and/or eparchial responsibilities.
160. Decisions regarding the use of vacant rectories by those other than the pastor are reserved to the Eparchial Bishop.
161. Although pets are discouraged in rectories, priests with pets are financially responsible for damages incurred to church property. The priests are also responsible for all civil liabilities resulting from the animal's misbehavior.

### **Safe Environment**

162. The clergy have a grave responsibility to implement and carry out the norms of the Safe Environment Program and the Code of Pastoral Conduct as found in Appendix D (Section 13) of this *Handbook*.
163. Failure on the part of the clergy to implement these Norms is grounds for removal from parochial and/or eparchial assignments.

### **Use of Our Churches**

#### **Non-Christians and Non-Catholic Use**

164. The use of our churches for worship services by any non-Christian or Protestant community is discouraged in most circumstances. If permission is given, no one may use or enter the Holy Place.

165. Only the Eparchial Bishop can give permission for specific use of our churches by non-Christian or non-Catholic groups.
166. Canonical Eastern Orthodox Churches may use our churches for worship provided that the norms outlined below for "Catholic Churches" be followed and the permission of the Eparchial Bishop is obtained (Canon 670, MPL 670 § 2).
167. Our churches may be used for ecumenical services only when the parish/mission clergy have helped in its preparation and are present for the service. Although permission is not needed to hold these services in our churches, the Eparchial Bishop should be notified.
168. Priests and deacons who have defected from the Catholic Church and are canonically irregular may not perform any priestly or diaconal ministry if an ecumenical service is held in our church. (MPL 908).

### **Catholic Churches**

169. For a special one-time use, our parish and mission churches are available for use by other Catholic Churches in Communion with the Apostolic See of Rome provided that the arrangements are made with the officially recognized, local representative of that Church, and the use does not infringe upon the needs of the parish for its own Divine Liturgy. Permission of the local pastor is sufficient.
170. For use of the church on a more regular basis, eg. weekly, bi-weekly, monthly, etc., the permission of the Eparchial Bishop is necessary. The following procedures must be followed:
  - a) The Eparchial Bishop and pastor will discuss the use;
  - b) The parish's first right to use its own church must be safeguarded;
  - c) The Bishop of the requesting community must write to our Eparchial Bishop, make a general request and give the name of the person who is authorized to negotiate in the Church's behalf;
  - d) The Eparchial Bishop gives permission for the pastor to negotiate with the official representative of the community;
  - e) The final written arrangements must be approved in writing by both Bishops before services may be held.

## **Visitation of the Eparchial Bishop**

171. While the Bishop must make the Canonical Visitation of all parishes and missions within a five year period (see to Canon 205), the Bishop is encouraged to visit all parishes every other year, if possible. With a Canonical Visitation, the Eparchial Bishop is:
- a) To examine the spiritual, educational and physical growth of the parish and its mission since the last canonical visitation;
  - b) To provide him an opportunity to be with the clergy and faithful of a parochial community and to discuss the life of the parish;
  - c) To provide an opportunity for the faithful and clergy to meet him personally and interact with him in an informal setting;
  - d) To discuss pastoral matters with the pastor regarding the parish and Eparchy;
  - e) To give the pastor an opportunity to discuss personal concerns.
172. A month prior to the Canonical Visitation, the Eparchial Bishop will discuss with the pastor the process that the Visitation will take.

## **Visitation: Protosyncellus and/or Eparchial Finance Officer**

173. Normally the Bishop will send the Eparchial Finance Officer to visit parishes every other year according to a schedule set by the Bishop. In certain cases the Bishop may also send the Protosyncellus.
174. The visitation is made during the week and will normally last long enough to allow time to:
- a) Visit informally with the pastor;
  - b) Review the pastoral administration and discuss pastoral matters of concern for the parish, region and Eparchy;
  - c) Give the pastor an opportunity to discuss personal concerns;
  - d) Meet with the Parish Advisory Council, if feasible.

175. The Protosyncellus/Eparchial Finance Officer will review the following with the pastor:

- a) Parish Statistics
- b) Parish financial records—all accounts
- c) Parish Inventory
- d) Care/condition of physical property and buildings
- e) Condition of the Sanctuary and church appointments
- f) Living condition of the rectory
- g) The Eparchial Bishop's recommendations from his last Canonical Visitation & their implementation.

176. In a timely manner after the completion of the Visitation the Protosyncellus and/or Eparchial Finance Officer will send the Visitation Report with his observations to the Eparchial Bishop and a copy of the report to the pastor.

177. A separate Visitation Report is to be completed for the Mission/Outreach, if there is one.

## **Cathedraticum/Collections**

*As God directs His people to return to Him a portion of what He has given to them, so the parishes do likewise to the Eparchial See to promote the work of the Church. Collections taken for special needs are a reminder to the parish and the Eparchy to be mindful of the needs of others.*

178. The Cathedraticum is the parish's tithes for the support of the evangelization and administrative activities of the Eparchy.
179. Each parish, mission, community, and parish organization has the moral obligation of paying the Cathedraticum.
180. The Cathedraticum is set at 10% of the gross income.
181. The Cathedraticum is paid monthly and is due at the Pastoral Center by the 25th of the following month.
182. Only the Eparchial Bishop can dispense a parish, mission, outreach or parish organization from paying Cathedraticum. The terms of the dispensation must be given in writing.
  - a) Outreaches are exempt from paying Cathedraticum provided that separate bank accounts are established for the Outreach and the proper Chart of Account numbers are used. In this case, each Outreach must complete a Cathedraticum form monthly. The money that would have been collected as Cathedraticum is to be seen as a subsidy from the Eparchy and so included in the Outreach's annual financial report to parishioners.
  - b) Canonically established Missions are exempt from paying Cathedraticum for five years from its founding as a Mission. In this case, each Mission must complete a Cathedraticum form monthly. The money that would have been collected as Cathedraticum is to be seen as a subsidy from the Eparchy and so included in the Outreaches' annual financial report to parishioners.

### **Calculation of the Cathedraticum**

183. All income is subject to the Cathedraticum which includes the following:
  - a) All donations and offerings of any kind, for any purpose, including, cash, securities, or any other material property.

- b) All interest and/or dividends accrued from loans, checking accounts, saving accounts, stocks and bonds, etc.
- c) The net profit from socials and fund raising projects.
- d) The year's gross income from special parish accounts and/or parish organizations either when it is turned over to the pastor or at the end of the calendar year. There are no exceptions.
- e) Bequests from trusts, estates, insurance policies
- f) Proceeds from the sale of real property (land and building), royalties earned or rents earned from real properties.
  - 1) If the property was originally purchased by the parish, the cathedraticum is to be calculated on the difference between the original purchase price and the current amount of sale. Documentation is required.
  - 2) Legal, real estate, and broker fees may be deducted in calculating the Cathedraticum. Documentation is required.

184. The following are not subject to the Cathedraticum:

- a) Principal on loan payments received.
- b) The cost of religious articles and votive candles
- c) Bishop's Appeal and Special Collections authorized by the Bishop
- d) The cost of food, supplies, etc. used in fund raising and/or socials
- e) Insurance proceeds for reimbursement of damage claims.
- f) Bishop's Appeal rebates and other rebates from purchases

#### **Cathedraticum Exemptions for Special Accounts**

185. The Eparchial Bishop after hearing the opinion of the Eparchial Finance Council may grant in writing to parishes and missions an exemption from Cathedraticum on special accounts set up for property purchase, new construction, and major renovations.

186. To be considered for an exemption, the parish/mission must



- a. be current with its financial obligations to the Eparchy (Cathedraticum, clergy medical insurance premiums and clergy retirement).
  - b. have reached its Bishop's Appeal goal for the last two years
  - c. have a special account set up into which the monies can be directly deposited from the collection
187. Cathedraticum exemption request in these cases are to be submitted to the Eparchial Bishop (Eparchial Treasurer) along with the following documentation:
- a. A letter addressed to the Eparchial Bishop requesting the exemption and giving the specific reason (property, construction, renovation as stated above);
  - b. The parish/mission financial report for the last two years.
  - c. Specify the account(s) for which the exemption is being requested.
  - d. The amount of money currently in the account for which the Cathedraticum exemption is being requested
188. If granted, the exemption will be normally given for a five year period and may be renewed for an additional five years, pending a review at the end of the first two-year period. The Finance Council will review the request and make recommendations to the Eparchial Bishop.
189. The total annual amount of the exempted Cathedraticum must appear in the Annual Parish/Mission Financial Report as a subsidy from the Eparchy.

**Cathedraticum—Non-designated Gifts, Bequests and Donations**

190. Gifts and bequests that have not been designated for a specific purpose will be assessed at the normal Cathedraticum rate applied to all other assessable income.
191. The payment shall be recorded in the Cathedraticum within the same accounting period the non-designated gift, bequest or donation was received.
192. Donations of real property should not be considered assessable income until the property is liquidated.

## **Cathedraticum—Restricted Gifts, Bequests and Donations**

193. There will be no assessments for Donor Restricted/Designated Income if the following criteria are met:
- a) The donation must be in the amount of one thousand (\$1,000) dollars or more.
  - b) The donation must be for a specific purpose (for example, the purchase of fixed assets, church appointments, Cathedraticum-exempt church property, etc.) and the documentation must accompany the annual Parish Financial Report to the Eparchy.
  - c) Documentation must include:
    - 1) The names of donor(s)
    - 2) The amount given
    - 3) The purpose of the donation and if the conditions of the donor were met. Copies of any correspondence from and to the donors should be included.
  - d) Parish Financial Reports that show contributions recorded to the Donor Restricted category and that are not accompanied with documentation for an exemption will not be considered for exemption. Those amounts will be classified as Donation Income and be assessed at the regular rate.

## **Special Collections**

194. The following special collections are to be taken in all parishes, missions and communities of the Eparchy:

<b>Title/Purpose</b>	<b>When</b>
a) <b>Bishop's Appeal</b> (See #196-199) The Appeal is to supplement the needs of the Eparchy with every household being asked to contribute \$200 (two hundred dollars).	<b>January to May</b>
b) <b>Home Missions</b> This collection is taken to support the need of the missionary Churches in the United States of which the Eparchy is one.	<b>Last Sunday of April</b>

- c) **Peter's Pence** **Last Sunday of June**  
This collection is taken to support the work of the Holy Father and the needs of the whole Church
- d) **Retired Religious** **2<sup>nd</sup> Sunday of December**  
This collection is taken to help support the retired religious sisters, brothers and priests who have served our Church in the United States.

195. Only the Eparchial Bishop may direct that other special collections be taken as need arises. (See also #218.)

### **Bishop's Appeal**

- 196. The Bishop's Appeal is the major annual funding raising event for the Eparchy of Phoenix with proceeds going to special eparchial projects and operational expenses as designated by the Eparchial Bishop.
- 197. It is the obligation of all parishioners of our parishes and missions to participate in this fund raiser to the best of their ability and resources and as a sign of their commitment to the Eparchy and their own parish/mission.
- 198. Normally, the Bishop's Appeal begins on the Feast of Theophany (January 6<sup>th</sup>) and concludes on May 31<sup>st</sup>.
- 199. The following procedures are to be followed:
  - a. By December 1<sup>st</sup> each year, all pastors will submit the updated names and address of their parishioners to the Pastoral Center.
  - b. The Eparchial Bishop's letter with distribution information and a pledge form is mailed to each household of the Eparchy in January.
  - c. The Director of the Bishop's Appeal will send to each parish in January, extra letters, pledge forms, and the list of goals for each parish based on a contribution of \$200 per household.
  - d. Pastors are to encourage their parishioners to contribute to the Appeal
  - e. Appeal donations are payable to the parish/mission.

- f. Once Appeal pledges have been paid by the individual families, it is the responsibility of the pastor to forward this money by parish check with the completed pledge forms to the Pastoral Center as soon as possible. Waiting to send in all the parish's pledge forms and money on the last day of the Appeal leads to mistakes and overwhelms those at the Pastoral Center with the necessary follow up.
- g. The Pastoral Center will issue a "Thank You" letter to these families.
- h. By June 15<sup>th</sup> all pledges complete and incomplete must be forwarded to the Pastoral Center.
- i. Parishes that have reached their goal will receive back a 30% rebate on the total amount contributed by the parish.
- j. Rebate checks will be issued from the Pastoral Center by September 1<sup>st</sup> to those parishes/mission who have made their goal.
- k. The Eparchial Finance Officer will see that the funds collected are distributed accordingly by November 1<sup>st</sup> of each year.

### **Financial Accountability**

- 200. The People of God return to the Lord a portion or tithe of their income for the support of the Church on a local and eparchial level.
- 201. Clergy and religious are called to set an example to the Faithful by tithing in supporting the parishes to which they are assigned or in which they live.
- 202. For good stewardship the Eparchial Bishop, Finance Officer, pastors and administrators have the obligation of using the people's tithes to God's Church wisely and must render an account of the financial administration of the Eparchy and parish to the faithful. (Canon 1031)
- 203. The financial reports must be presented accurately and easily understandable by the faithful.
- 204. The Chart of Accounts as found in Appendix C (Section 12) of this *Handbook* is to be used by all parishes without exception.

205. All eparchial entities (parishes, missions, outreaches, parish organizations, etc.) are to use *Quick Books Pro 2006* or later versions for keeping financial records. There are no exceptions!
206. Parish Financial records are to be maintained in the parish office. For the sake of those who assist the pastor in maintaining parish financial records, a copy of the necessary files maybe used on a personal computer with the understanding that these records belong to the parish and are to be kept confidential and secure. The parish computer is to be updated frequently from the updates kept at an authorized person's home.
207. Money collected for parish fund raisers are to be kept in the safe at the parish. Money should never be taken home by parishioners or people handling parish fund raisers.
208. Independent pious funds or foundations for the good of the church may not be established or administered by a cleric on his own authority. Only the eparchial bishop can constitute such a fund and determine its purpose and distribution (Canon 1043-1054).

### **Eparchy**

209. Each year the financial records of the Eparchy will be audited by an outside firm. The results of the audit will be distributed to the parishes and available for the faithful to review.

### **Parishes/Missions/Outreaches**

210. Funds in accounts under the name of the parish or employing the Employer Identification Number (EIN) or benefiting from the tax exempt status of the Church in any way are the property of the Church and under the administrative control of the local pastor. (See also #226.)
211. Properties supposedly owned by a priest or layperson and using the church tax exemption are legally considered to be owned by the church.
212. A cleric or layperson is not permitted to deposit personal funds in parish accounts. Personal funds found in parish accounts will be considered parish property. Commingling of funds in any manner is strictly forbidden and against the civil law for which a person may be prosecuted.
213. The Eparchial Bishop is to be a signer on all parish accounts along with the pastor, and at least one lay person approved by the Bishop. One signature is usually sufficient for a transaction. (See also #18.)

214. Checking accounts for the ordinary operation of the parish should contain an amount of money needed for the operation of a parish for two months. If possible, these should be interest bearing checking accounts.
215. A priest cannot lend any personal funds to a parish or ecclesiastical institution without the written consent of the Eparchial Bishop. Otherwise, any transaction is to be considered a donation to the parish or the ecclesiastical institution on the part of the priest in conformity with civil law. (See # 278)
216. A priest may not use parish funds to pay personal debts.
217. The pastor is not allowed to sell or buy property for the parish without a written authorization from the Bishop.
218. Collections for any purpose other than for the parish itself or designated eparchial collections are forbidden without the explicit written permission of the bishop. (see # 195)
219. At the time of a transfer of parish administration, the outgoing pastor is directed to update all ecclesiastical and financial records along with a parish inventory. These records are to be signed by both the outgoing and incoming pastor.
220. Every Sunday, the income from the previous week's collection must be recorded in the Sunday Bulletin along with the attendance at each Liturgy.
221. The pastor of a parish will prepare a financial report with the assistance of the finance officer, if there is one, of the previous calendar year for distribution to the parishioners by March 15th.
222. The annual financial report will contain the itemized parish income and disbursements according to the approved Chart of Accounts. The checking account balance and the balances of all other accounts as of December 31<sup>st</sup> are also to be included.
223. Copies of the annual financial report will be sent to the Eparchial Bishop's office by April 1st.
224. By February 1st of each year, the pastor will give to each household a statement of their financial contributions to the church for the previous year.
225. The Internal Revenue Service requires tax exempt entities to write a letter of acknowledgement for each contribution of \$250.00 or more. This

letter is to be given to the donor. A check no longer suffices as proof of a donation in these cases. The letter must include the statement: "No services or material goods were provided in exchange for this (these) donation(s)"

### **Parish Organizations**

226. Money collected by parish and/or parish organizations belongs to the parish and is under the administrative authority of the pastor. (See #210)
227. Parish societies and organizations that collect money and/or using the eparchial/parish employee identification number (EIN) must ask for permission from the pastor that one of their officers/members be empowered to co-sign checks along with the pastor, in which case the signature of the pastor and the officer/member are required for transactions.
228. Parish organizations are to submit an annual financial report to the parish, a copy of which is to be submitted to the Eparchial Finance Officer, attached to the annual parish financial report.

### **Segregation of Financial Responsibilities**

229. Parishioners' offerings are freely given and their generosity should not be taken lightly. Every effort should be made to protect these gifts. Volunteers and parish personnel are precious to the Church and should not be placed at risk by allowing them to practice unsafe and non-businesslike money handling methods.
230. Segregation of responsibilities in handling money is a central principal of good accounting practices. Segregation means that different persons are responsible for specific fund transactions from the moment money is received until it is deposited so as to safeguard the individuals and the institution from mismanagement or misappropriation of funds.
231. Segregation of financial responsibilities is quite detailed and can be unwieldy for small parishes but, nonetheless, necessary. To meet this need for financial integrity, pastors are asked to implement one of the models below for use at his parish:
  - a) **Model A: Pastor by Himself**
    - 1) The Pastor should refrain from handling the collection. He appoints the necessary person to collect, secure, count, and deposit the collection.

- 2) The Pastor can record the bank deposit into Quick Books.
- 3) The Pastor should open and review bills and authorize payment.
- 4) Pastor may write the checks and sign checks.
- 5) The Pastor should open all bank statements and review them and do the bank reconciliation monthly.
- 6) A designated member of the Parish Advisory Council should review the reconciliation and sign off on it monthly or at least quarterly.

**b) Model B: Pastor with the Assistance of a Bookkeeper**

- 1) The Pastor should refrain from handling the collection, counting it or depositing it.
- 2) The Pastor opens bills and authorizes their payment by giving them to the bookkeeper.
- 3) The bookkeeper records the deposits, parishioner's contributions, writes checks and does the bank reconciliation.
- 4) The bookkeeper must not have signature on any parish accounts. Only the pastor should regularly sign checks. Another person—parochial vicar, pastoral associate or a designated lay person—should be authorized to sign checks in the Pastor's absence or by his delegation.
- 5) The Pastor opens all bank statements and reviews them before giving them to the bookkeeper to reconcile.
- 6) The Pastor reviews the reconciliation reports and signs it.

**c) Model C Pastor with a Financial Administrator**

- 1) The Pastor should refrain from handling the collection. He appoints the necessary persons to collect, secure, count, and deposit the collection.
- 2) The Pastor opens all bills to review them.



- 3) The Financial Administrator pays the bills.
- 4) The Pastor opens all bank statements before giving them to the Financial Administrator to reconcile.
- 5) The Financial Administrator gives the Reconciliation Reports to the Pastor to review and signs off on it.

### **Taking and Counting the Sunday Collection**

232. At each Sunday or Holyday Liturgy the Collection is taken by at least two non-related persons. A third person, non-related to those taking the collection, will supervise the placement of the collection into the appropriate bags.
233. Collections should be taken directly from the collection baskets, placed in pre-assigned bags and locked in a safe or secured place as soon as possible after the collection is taken.
234. If it is the practice to place the collection in front of the Icon of Christ, there should be two designated and non-related persons who observe the collection during the rest of the Liturgy and then secure the collection immediately at the end of the Liturgy and place it in the parish safe.
235. Access to this safe should be limited to as few persons as is practical.
236. If the collections must be moved from the Church to another building, at least two persons should transport the money to the parish safe. One person carrying the collections from one building to another is at risk as is the money.
237. The Sunday collection is to be counted on the parish premises, not at someone's home.
238. Collections should remain locked in the safe until it is ready to be counted.
239. The collection takers and collection counters are to be different people.
240. It is strongly recommended that at least two different teams with a minimum of at least two non-related persons be selected to count the collection every other week.

241. When the counters arrive, the collection bags should be retrieved from the parish safe and opened by the counters.
242. Care should be taken that an orderly process is followed for counting the collection and that the necessary tally sheets be used and signed by the counters at the end of the counting session.
243. Cash should never be removed from the collections. All collections should be deposited "intact" at the bank, i.e., checks should not be cashed from the collections nor should cash disbursements be made from the collections.
244. All checks should be endorsed as soon as is practical after they are received with the wording "For Deposit Only", the name of the bank and the parish account number.
245. The deposit at the bank should be made as soon as possible after the collection is counted. If the deposit is made on the weekend, two persons should take the deposit to the bank's night deposit.
246. The bank deposit receipt should be stapled to the collection tally sheet and filed with the other monthly deposit receipts.

## **Appointment of Priests**

247. Priests of the Eparchy of Phoenix are called to an abiding awareness that their priestly vocation is a call to the service of the Eparchy of Phoenix at large, and cannot therefore be confined to any particular parish or parishes or to a given geographical area.
248. The needs of the Christian faithful in a specific area of the Eparchy and the particular qualifications of an individual priest are given primary consideration in making appointments. Language justifications likewise need to be heeded.
249. It is the right and the responsibility of the Eparchial Bishop to appoint the pastors and parochial vicars of the Eparchy for the good of the Christian faithful. With due regard for the exclusive right of the Eparchial Bishop to appoint priests, the Eparchial Personnel Board may be consulted by the Eparchial Bishop for their input in the appointment of clergy to parishes and missions as well as other pastoral assignments.
250. A priest should feel free to manifest to the Eparchial Bishop his desire to remain at his assignment or to be transferred to another.
251. Once the priest has received his letter of appointment, he is to fulfill the office in a true spirit of service and obedience.
252. When the priest communicates his appointment to the parishioners, he should encourage the Christian faithful to accept and respect the wishes of the Eparchial Bishop for the good of the Eparchy and the parish.
253. A newly ordained priest and priests new to the eparchy should ordinarily be appointed as Parochial Vicars until such a time the Bishop deems him able to assume the role of pastor.

## **Bi-Ritual Indult and Eparchial Faculties**

254. The ideal is that each parish or cluster of parishes have the availability of other priests with a bi-ritual indult and eparchial faculties to help on a regular basis or be available for substitution for vacations, emergency situation or as the need arises.
255. Bi-ritual indults are sought from Rome by the Eparchial Bishop for only those priests who know the theology, spirituality and ritual of the Byzantine Catholic Church; are willing to serve when needed or available; and are willing to learn proper chants and liturgical ceremonies.

256. Since a priest receives a bi-ritual indult and eparchial faculties in order to serve the needs of the Eparchy of Phoenix, he must be willing to serve the needs of this Eparchy. If the priest has not assisted our Eparchy, his Indult will not be renewed and his faculties terminated.
257. If a priest with bi-ritual indult and eparchial faculties is assigned to a parish within our Eparchy for the first time, a priest mentor from the Eparchy will be appointed to help him become better acquainted with the liturgical and administrative aspects of the Eparchy.
258. Priests lacking either an Indult from Rome or Faculties of the Eparchy are not to serve in our parishes and missions without the explicit permission of the Eparchial Bishop.

#### **Procedure for Requesting a Bi-ritual Indult for the First Time**

259. The priest desirous of receiving bi-ritual Indult should be interviewed by the local pastor. In this interview the local pastor should try to ascertain the following:
  - a) The priest is in good standing with his own diocese/religious community;
  - b) The priest seems to possess a good moral character;
  - c) The priest has an understanding of who we are as a Church and has interest in our Eastern theology, liturgy and spirituality;
  - d) The priest has the availability to serve as needed in the Eparchy;
  - e) At the conclusion of the interview the pastor should encourage the priest to concelebrate with him regularly so that he can ascertain the ability of the priest as well as become familiar with his personality.
260. Feeling that the priest is genuine in his desire, the local pastor then writes a letter to the Eparchial Bishop in which he summarizes the interview, gives an initial evaluation of the priest, and gives his recommendations.
261. Having reviewed the pastor's letter and found it favorable, the Eparchial Bishop will speak to the pastor and ask him to contact the candidate to send the following information to the Eparchial Bishop:

- a) A letter from the priest addressed to the Eparchial Bishop, requesting bi-ritual Indult and Eparchial Faculties;
  - b) A curriculum vitae
  - c) A letter from the priest's Ordinary addressed to the Eparchial Bishop, stating that
    - 1) The Ordinary gives his permission for bi-ritual Indult
    - 2) The priest is in good standing in his own diocese or religious community and has had all the necessary safe environment background checks.
262. The Eparchial Bishop arranges a personal interview with the priest if possible.
263. If the priest is accepted, the Eparchial Bishop appoints the local pastor or another priest to prepare him for the celebration of the Divine Liturgy according to the approved norms. He is given instruction in the rubrics of the Byzantine Catholic Church and is encouraged to continue concelebrating as often as possible with the instructor priest.
264. When the bi-ritual indult arrives from Rome, the Eparchial Bishop will grant the Faculties of the Eparchy to the priest for a specific period usually lasting the duration of the Indult. A copy of this letter is sent to the local pastor and the priest's Ordinary.
265. When the instructor priest knows that the priest has sufficient knowledge of the proper celebration of the ceremonies and chants for the Divine Liturgy, and the Indult from Rome and the Faculties of the Eparchy have been granted, the priest will celebrate the Divine Liturgy as celebrant with the instructor priest concelebrating. This will continue until the instructor feels that the priest can celebrate by himself.

#### **Renewal of Bi-Ritual Indult/Faculties**

266. Six months prior to the expiration of the Indult the bi-ritual priest must write to the Eparchial Bishop and request that his Indult and Faculties be renewed.
267. The priest is to request a letter from his Ordinary approving the renewal of the Indult. This letter is to be sent to the Eparchial Bishop.

268. The Eparchial Bishop will evaluate the priest's service to the Eparchy. If the review is favorable, the Eparchial Bishop will apply for the renewal of the Indult.
269. When the Indult is granted, the Eparchial Bishop renews the Faculties.

### **Granting Faculties to a Priest Already Having a Byzantine Indult**

270. A priest of our Eparchy must recommend in writing to the Eparchial Bishop that the priest possessing the bi-ritual indult be given eparchial faculties.
271. The priest himself must request Faculties from the Eparchial Bishop in writing and include the following documentation:
- a) A letter from his Ordinary addressed to the Eparchial Bishop stating that he is a priest in good standing within his diocese or religious community and granting him permission to seek the Faculties of the Eparchy;
  - b) A curriculum vitae including a list of Byzantine Churches he has served;
  - c) Copy of the latest Bi-ritual Indult from Rome
272. The Eparchial Bishop grants or denies the Faculties of the Eparchy.

### **Compensation of Priests**

273. In accordance with the *Code of Canons of the Eastern Churches*, each priest serving in the Eparchy has the right to a suitable salary, benefits and other compensation to which he is entitled as established by the Eparchial Bishop in consultation with the Presbyteral Council.
274. The salaries of the priests will be reviewed every two years by the Eparchial Bishop and the Presbyteral Council in relation to the cost of living scales, and the suitable recommendations made to the Eparchial Bishop for increases in remuneration.
275. A priest shall accept the salary, benefits and other compensation due to him unless, with the Eparchial Bishop's written permission, he freely chooses to accept nothing or a reduced sum, provided he does not lack the necessities of food, clothing and shelter.

276. The pastor will present the Eparchial Bishop's letter to the Parish Advisory Council regarding his decision to take a lesser or no salary. The Council is to be aware of the financial impact this will have on the parish's financial picture, especially in light of future change in pastor when the full salary would have to be restored.
277. If a priest, without the Eparchial Bishop's written permission, fails to accept his salary, benefits and other compensation within six months of its becoming due to him, he thereby renounces his right to whatever he did not accept, and cannot thereafter seek it under any title from the parish or from the Eparchial Bishop, unless provided differently by civil law.
278. A priest may not loan any money to his parish without the written permission of the Eparchial Bishop. This letter must include the amount loaned, the interest rate, and the repayment schedule. (See also #215.)
279. Where the salary shall impose a serious financial burden upon his parish, the priest is to present this matter to the Eparchial Bishop for resolution. This is not to be interpreted to mean that the Pastoral Center will assume the burden of supplying any deficient amounts.
280. Priests with an official full time assignment in the Eparchy are not to seek employment outside of the parish to which they have been assigned without the explicit written permission of the Eparchial Bishop in each case.

### **Salaries**

281. Pastors, Administrators, and Parochial Vicars who are resident, be they eparchial or religious priests, shall receive an amount determined for all pastors of the Eparchy by the Bishop in consultation with the Presbyteral Council.
282. Full time chancery personnel who are priests receive the salary, benefits and other compensation as Pastors unless otherwise contracted. Priests who serve in the chancery part time will have their salary set by the Eparchial Bishop.
283. Non ordained religious with an Eparchial assignment will receive the same salary as a pastor.

### **State and Federal Taxes**

284. Eparchial priests are responsible for filing and paying their own local, state and federal income taxes.

## **Social Security**

285. While not obligated to participate in the federal Social Security program, priests are strongly encouraged to be enrolled in the program. (Remember that under Social Security a priest's primary medical insurance becomes Medicare upon retirement. Currently, the Eparchy only pays for supplemental insurance upon retirement.)
286. The parish cannot make contributions or payments toward Social Security. Only the priest himself can make these payments.

## **BENEFITS**

### **Retirement Fund**

287. During a priest's active ministry, his primary source of salary (parish, eparchy, etc.) is to contribute the assessed amount to the Eparchial Priests' Retirement Fund.
288. If the priest is a religious, the source of salary will contribute the same amount to the Religious Community's Retirement Fund.

### **Health Insurance**

289. The priest's source of salary (parish, eparchy, etc.) will pay for the medical insurance as assessed by the Eparchy or his religious community.

### **Automobile Insurance**

290. The source of salary (parish, eparchy, etc.) is to pay the priest's automobile insurance, but for only one vehicle up to the amount of \$1,300.00 per year. Written permission of the Eparchial Bishop is required to pay a premium over this amount.

### **Telephone Calls/Household Expenses**

291. The parish is financially responsible for all telephone charges. Personal long distance calls are to be reimbursed monthly to the parish.
292. Cell phones used for parish/eparchial business are to be paid by the parish/eparchy. Charges for personal use of the same cell phone are to be prorated and paid by the priest.



293. The parish is responsible for household supplies (paper goods, cleaning supplies, etc.). Food and beverages are considered personal expenses.
294. The parish is responsible for basic cable television charges. This does not include premium channels.

#### **Reimbursement for Moving Expenses**

295. On change of assignments, the parish to which the priest is being transferred is to assume the moving costs.

#### **Reimbursement for Eparchial Services**

296. Priests and religious assigned to offices within the Eparchy are to be reimbursed for expenses incurred in the fulfillment of said office.

#### **Eparchial Clergy Functions**

297. The expenses including transportation for clergy gatherings, conferences and retreats are the responsibility of the source of salary.
298. The transportation cost and costs of Eparchial events (retreats, conferences and other authorized gatherings) for clergy and religious will be equally shared by all the parishes even if the pastor is excused from the mandatory gathering.
299. The actual cost for room and board and conference fees are to be paid from the source of salary.
300. As transportation is provided by the host parish, car rentals for these gatherings are the responsibility of individual cleric or monastics.

#### **Bonus and Parish Appreciation**

301. No priest, deacon or religious serving in a parish is entitled to any bonus at any time, nor may one be requested.
302. Parishes and parish societies are not permitted to disburse funds from their treasuries in favor of their clergy on special occasions such as anniversaries or holydays.
303. Individual parishioners on special occasions may express their gratitude by giving a personal, monetary gift to the priest and/or religious.

### **Newly Ordained Priests and Deacons**

304. On the occasion of the Ordination to the Diaconate or Priesthood and/or First Liturgy of a parishioner, the parish may **not** take a special collection for the newly ordained.
305. On this occasion each parish society, should it elect to do so, may give a gift to the newly ordained from its society treasury, but not to exceed \$100.00.
306. Parishioners may express their congratulations and best wishes by means of a personal, monetary gift.

### **Priestly Anniversaries**

307. On the occasion of anniversaries, birthdays, transfer to another parish or retirement, parishioners may express their congratulations and best wishes by means of personal, monetary gift. It is understood that money is not given from parish funds or parish societies on these occasions.

### **Continuing Formation of Clergy**

308. Besides promoting clerical fraternity within the Eparchy, priests and deacons are encouraged to gather with other Eastern and Latin Catholic clergy in their area for prayer, education, fraternity, and support.
309. Priests and deacons are to engage in personal study and reflection that have a bearing on their lives as priests or deacons.
310. All priests of the Eparchy are to attend the annual clergy retreat and the clergy conference. Deacons are encouraged to do so. (See also Canon 369 § 2).

### **Deacons**

311. Enrollment into the Eparchy as a cleric takes place at the time of diaconal ordination (Canon 358).
312. Priests shall accept, support and affirm the ministerial role of the deacon. Deacons shall likewise accept, support and affirm the priest's ministerial role, and uphold the pastor's authority and dignity to the parishioners.

313. A married deacon is to be a dedicated and loving husband and father and thus set an example of Christian family living to the Christian Community. His priorities are God, family, occupation, and ministry.
314. Each deacon is expected to have a spiritual director and to care for his own spiritual life.
315. The deacon as an ordained cleric is assigned to a particular parish as a co-worker with the Pastor in ministering to the needs of that parish.
316. The Deacon as a co-worker with the pastor is to be involved in the life of his parish.
  - a) While the pastor is the one ultimately responsible for the parish, he and the deacon with the Parochial Vicar, if there is one, form the pastoral team of the parish.
  - b) The pastor and the deacon are to agree upon the particular role that the deacon will have in helping to animate and direct the parish.
  - c) The deacon is to exercise his ministry in those areas assigned to him by the pastor, e.g. Religious Education; Baptismal and Marriage Preparation; Catechumenate; Visiting the Sick; Altar Servers Coordinator; etc.
317. The deacon receives no set financial remuneration unless his letter of appointment states a specific amount.

### **Liturgical Role of the Deacon**

318. The Deacon's primary ministry is that of serving the Divine Liturgy.
319. The deacon assigned to a particular parish has a right to participate actively in his particular capacity as deacon in all liturgical services celebrated within his parish. The proper place of the deacon is at the altar, not seated in a pew as a lay person.
320. The deacon may in the absence of the priest celebrate Typica, Vespers, Matins, Parastas, Paraklis, and Molebens.
321. The deacon may not celebrate by himself the Liturgies of St. John Chrysostom and St. Basil the Great, the Liturgy of the Presanctified Gifts, Baptism-Chrismations, Weddings, or Holy Anointing of the Sick. These Holy Mysteries by their very nature in the Byzantine Catholic

Church must be celebrated by a priest. A deacon assists the priest according to his proper liturgical role.

322. The deacon is not the ordinary minister of the Divine Eucharist, but in cases of true necessity may help with the distribution of Holy Communion according to the *Norms of the Particular Law of the Byzantine Metropolitan Church sui juris of Pittsburgh* (Canon 709, §1).
323. The deacon may preach at any liturgical service in agreement with the pastor.
324. The liturgical norms promulgated by the Byzantine Metropolitan Church *Sui Juris* of Pittsburgh and the Eparchial Bishop of Phoenix are to be observed.

### **Visiting Deacons**

325. Any deacon ordained for the Eparchy of Phoenix is welcomed to exercise his diaconal ministry in any parish of the Eparchy with the permission of the local pastor.
326. Any deacon enrolled in another eparchy who wishes to exercise his diaconal ministry in a parish of the Eparchy of Phoenix must have a letter from his bishop stating that he is in good standing and has a favorable background check before he can serve in the church in any capacity.
327. Every deacon enrolled in another Eparchy but who ministers in the Eparchy of Phoenix is bound by the liturgical norms of the Eparchy of Phoenix.
328. If there are many deacons, they are to be fully vested and take their place either in the sanctuary or front pew if room is lacking in the sanctuary.

### **Requesting a Deacon from Another Parish Within the Eparchy of Phoenix**

329. When a deacon is specifically requested by another pastor to come to his church to serve there, the requesting pastor should contact the deacon's pastor.
330. If the deacon must travel a great distance, the requesting pastor must pay the traveling expenses of the deacon from parish funds.

### **Transfer and Enrollment of Deacons**

331. A deacon who moves is still responsible to his own Eparchial Bishop until such time as he is granted enrollment in another eparchy.
332. Requesting enrollment in another Eparchy should not be undertaken unless the likelihood of returning to one's original Eparchy is remote.
333. Enrollment will not be granted to a deacon moving into the Eparchy of Phoenix until a suitable period of time, ordinarily three years, has passed within which the deacon has demonstrated consistent service in an appropriate assignment.
334. In order for a deacon already enrolled in some eparchy to be validly transferred into another eparchy, he must obtain from his Eparchial Bishop letters of dismissal signed by the same bishop and at the same time must obtain letters of enrollment signed by the eparchial bishop of the eparchy in which he wishes to be enrolled. (Canon 359)

### **Leave of Absence**

335. A leave of absence may be granted to a deacon when formally requested by the deacon in writing to the Eparchial Bishop. A leave of absence may be granted for reasons of health, study, personal problems, family commitments, change of occupation or parish situation, etc.
336. Such a leave will be granted for a specified period of time. Before the termination of the leave, the situation will be reviewed by the Eparchial Bishop and the leave extended if necessary.
337. A deacon may request a return to active ministry before the agreed-upon expiration date.
338. Although while on leave, the deacon is in good standing, he may not function in any ministerial capacity except with the permission of the Eparchial Bishop, and he may not wear clerical attire.
339. In the event that a deacon experiences marital difficulties leading to separation and/or divorce, a leave of absence from public ministry will be granted to avoid possible public scandal.
  - a) In the event of emerging reconciliation, with due time being allowed for healing among all the parties concerned, including children, the deacon will be reassigned to active ministry.

- b) In the event of non-reconciliation or ensuing legal divorce, the return to active ministry will be decided in light of the established responsibility of the deacon for the failed marriage and of his parental and financial responsibilities incurred by him as a result of the failed marriage.
  - c) In the event of an annulment, in addition to the above considerations of antecedent causal responsibilities and consequential parental and financial responsibilities, the Tribunal sentence will be reviewed before a deacon may return to active ministry.
  - d) In the event that a causal responsibility of the deacon for the marital difficulties be judged severely grave (eg: abuse, infidelity, criminality, pathology), return to the lay state may be considered by the Eparchial Bishop.
340. Every effort ought to be made to return the deacon to ministry once it has been determined that the deacon is ready emotionally and that all issues concerning scandal and canon law have been resolved.
341. A deacon who petitions for a return to the lay state is placed on inactive leave, and may not minister as a deacon in any Catholic Church nor wear clerical attire.

### **Clerical Attire**

342. When fulfilling his liturgical role at services, the deacon shall be dressed in gray or black cassock, a sticharion (dalmatic) and an orarion.
343. When not functioning but attending the Divine Liturgy, the deacon shall be fully vested. He shall come to the altar to receive the Eucharist.
344. When attending church-related social functions as an official representative of the parish, the deacon shall wear a black or gray suit with a clerical collar or cassock/riasa.
345. When attending functions or work that is not church-related, the deacon shall wear lay attire.

### **Proper Courtesy**

346. The proper address for a deacon is either *Father Deacon* or simply *Deacon* plus his first name. In correspondence he is addressed as Reverend Mr. or Reverend Deacon with his first and last name.

347. In the parish the deacon and his wife should be treated with respect and recognized at parish functions, e.g. seated at head table.

### **Bi-Ritual Deacons**

348. The bi-ritual indult is not granted by Rome to deacons to function in their capacity at the Divine Services, but by mutual consent of the proper Ordinaries.
349. A deacon of another ritual Catholic Church receives permission from the Eparchial Bishop after his proper Ordinary has granted him permission.
350. All bi-ritual deacons are obligated by all the norms and directives of the Eparchy of Phoenix while functioning within this ecclesiastical jurisdiction.
351. If a Byzantine Catholic deacon is invited to perform Baptisms and Marriages in the Latin Church using the Latin ritual, he needs permission from the Holy See.

### **Death of A Priest/Deacon**

352. At the time of a priest's death, the rectory shall be sealed by the priest/deacon appointed by the Eparchial Bishop. He will see to it that all the locks to the rectory are changed. No relative, parishioner or friends shall be allowed in the Rectory without the expressed permission and presence of the one designated by the Eparchial Bishop.
353. Any property not listed in the priest's personal inventory kept at the Pastoral Center will be treated as parish property unless proven otherwise.
354. Each priest and deacon shall have documentation with his desires regarding his funeral in his personnel file at the Pastoral Center. Any changes or updates should be forwarded to the Eparchial Bishop. He should share this with his immediate family and/or his executors.
355. A current copy of the priest's will in a sealed envelope should be sent to the Eparchial Bishop and kept in the priest's personnel file unopened.
356. The Eparchial Bishop will honor the arrangements of the deceased priest or deacon while taking into account the desires of his immediate family within the parameters of the liturgical norms.

357. If possible, the main funeral should be celebrated in the parish to which the deceased priest or deacon was last assigned.

### **Liturgical Observances a Deceased Bishop, Priest, or Deacon**

358. Each priest is to celebrate one Divine Liturgy for the eternal repose of a deceased Metropolitan, Bishop of the Metropolia, Eparchial Bishop, eparchial priest and deacon within 40 days of the cleric's death.
359. If the deceased was the Metropolitan or a Bishop who had served in the Eparchy of Phoenix, each parish is to have one Divine Liturgy for his eternal repose with a Panachida on a day that is convenient for the faithful to attend.
360. In the case of a deceased eparchial priest or deacon, each parish where the deceased served is to have one Divine Liturgy with a Panachida for his eternal repose at a time convenient for the faithful to attend.
361. When a pastor or a deacon of the parish dies,
- a) the funeral services will normally take place at the parish of assignment;
  - b) the funeral service is to include the two Vigil Services for a Priest/Deacon and the Divine Liturgy;
  - c) the parish should provide refreshments after the evening services and a luncheon after the Funeral Divine Liturgy;
  - d) all clergy are strongly encouraged to attend the funeral services;
  - e) on the 40<sup>th</sup> day after death the parish will have Divine Liturgy with a Panachida;
  - f) the deceased cleric's estate will be responsible for the funeral expenses.

### **Enrollment (Incardination) and Service in the Eparchy**

362. In accordance with Canon 260, non-enrolled priests and deacons are eligible to request enrollment into the Eparchy of Phoenix after serving a minimum of three years in the full time service of the Eparchy. The petitioner shall write to the Eparchial Bishop stating that he seeks enrollment.



363. Before completing five years of service in the Eparchy, a cleric from another Eparchy or an exclaustated religious may apply for enrollment in the Eparchy, provided he has informed both Bishops in writing of his desire to be enrolled and neither has responded in writing negatively. (See Canon 360.2)
364. When a priest from outside the Eparchy of Phoenix is first accepted for service, he shall be placed in residence or as an administrator of a parish under the guidance of an eparchial priest who will serve as his mentor and assist the priest in making the transition into eparchial life. He will make recommendations to the Eparchial Bishop regarding the permanent enrollment of the priest into the Eparchy.
365. In the case of a deacon from outside the Eparchy, he will be assigned to a parish of the Eparchy under the guidance of the pastor.
366. The following documentation is to be supplied by the petitioner to the Eparchial Bishop at the time of the request for enrollment:
- a) A personal history, date and place of birth, upbringing, schools attended and degrees received, significant illnesses, special talents or skills in the ministry, any physical and/or emotional problems, if any exists;
  - b) A ministerial history including when and where ordained, assignments held, reasons for transfers, etc.;
  - c) Reasons for requesting enrollment in this Eparchy;
  - d) Reasons for leaving the former eparchy, religious community or jurisdiction;
  - e) Types of assignments for which he feels suited;
  - f) Types of assignments for which he feels unsuited;
  - g) He must sign a release for a safe environment background check and complete the safe environment program of the Eparchy.
  - h) In case of a cleric from a monastic/religious community, a decree of exclaustation or a letter from his bishop/religious superior granting the petitioner permission to seek enrollment into this Eparchy;

- i) A certificate of health from a doctor or doctors appointed by the Eparchy. This certificate will also verify freedom from chemical dependency, provide the results of HIV testing;
  - j) A psychological evaluation by a doctor appointed by the Eparchy;
  - k) Sign a waiver that would permit the Eparchial Bishop to request the cleric's personnel file from his current Ordinary;
  - l) Letters of recommendations from those who are familiar with the background and character of the petitioner, one of which must be from a priest and/or bishop.
367. The final decision on the request for enrollment is the responsibility of the Eparchial Bishop who may consult the Personnel Board.

### **Medical and Disability Leaves of Priests**

368. After having reviewed the medical records of an eparchial priest and the recommendations and diagnosis of a duly licensed physician, the Eparchial Bishop may grant to a priest a leave of absence for medical reasons for a period not to exceed 90 days. The Eparchial Bishop may request a second opinion from another doctor designated by the Eparchial Bishop.
369. During that period, with the permission of the Eparchial Bishop, the priest may remain in his assignment and shall remain eligible for all salary allowances and benefits, including his current residence at the assigned location, payable by the parish or institution to which he is assigned.
370. During his leave, the priest may not engage in service to another parish or accept any assignments for which he will receive remuneration.
371. If the medical condition extends beyond the 90 days of the medical leave, the Eparchial Bishop may grant a disability leave under the following conditions:
- a) If the priest is unable to engage in priestly ministry, which includes but is not limited to, activities such as preaching, teaching, counseling, administration of the Holy Mysteries, or in any other gainful employment;

- b) If a duly licensed physician states in writing that the priest is unable to engage in at least one of the above-mentioned activities of priestly ministry or any other gainful employment and indicates how long such a condition is expected to remain.
372. Every six months beginning with the date of the disability leave, the priest, if he is able, and his licensed physician will submit a written report to the Eparchial Bishop about the condition of the priest.
373. The Eparchial Bishop at his sole discretion will revoke the disability leave at any time when the priest is able to engage in priestly ministry.
374. During the six-month review, the Eparchial Bishop may request additional information and/or documentation which includes, but is not limited to, medical records, psychiatric reports, etc. All such material will be treated with the appropriate confidentiality.
375. Throughout the disability leave:
- a) The priest will receive the salary of a retired priest. Both his salary and medical insurance premium will be paid from the eparchial general funds.
  - b) He is not to engage in any gainful ecclesiastical or secular employment either on a full-time or part-time basis.
  - c) The priest is permitted to retain Divine Liturgy stipends, social security or any insurance benefits to which he is entitled.
376. Failure to comply with the above mentioned stipulations or any directives of the Eparchial Bishop can result in the revocation of the disability leave.
377. During the disability leave, the priest is responsible for his own room and board and any medical expenses not covered by the health insurance.
378. When it becomes obvious that his condition is permanent, the Eparchial Bishop will grant early retirement.

### **Pastoral Leadership**

379. It is understood that a pastor's primary responsibility is to his parish and to his eparchial responsibilities. Any other special and personal

ministries are secondary and must not consume his time to the detriment of his parochial/eparchial responsibilities.

380. Priests and deacons should strive to work with the Eparchial Bishop and each other.

### **Personal Spirituality**

381. The priest or deacon is to be recognized as a man of faith who is able to communicate his faith to others in the performance of his ministry.
- a) He provides spiritual leadership which demonstrates and utilizes belief, prayer, and a deep sacramental life as motivating and sustaining influences.
  - b) He must find in his ministry to his people, in his personal prayer, and in his participation in the liturgical life of the Church, the means of spiritual growth.
  - c) Priests are encouraged to celebrate the Divine Liturgy frequently, even daily, except on the prescribed aliturgical days.
  - d) Each priest is encouraged to have a spiritual director.
  - e) He deepens his personal commitment to Christ through forgiveness, reflection, reading, study and prayer, and teaching which is part of his office.

### **Liturgical Responsibility**

382. The priest and deacon should demonstrate a willingness and an ability to celebrate all liturgical services reverently, properly and with dignity.
383. The liturgical services are to be celebrated in accord with the promulgated liturgical books of the Byzantine Metropolitan Church *sui juris* of Pittsburgh.
384. The pastor is to celebrate one Divine Liturgy for intentions of the people entrusted to his care (Pro Populo Liturgy) on all Sundays and days of precept, namely the Nativity of our Lord, the Theophany of Our Lord, the Ascension of Our Lord, Saints Peter and Paul, and the Dormition of the Theotokos, (MPL, Canon 294)
385. A pastor responsible for the care of two or more parishes and/or missions is obligated to celebrate only one Divine Liturgy for the all

people entrusted to his care on Sundays and days of precept enumerated in the previous number.

386. The pastor is to provide for the celebration of the Divine Liturgy on solemn and simple holydays.
387. According to the Decree of Vatican II *Constitution on the Liturgy* #52, a homily, which is an explanation of the Sacred Scripture, is mandatory on all Sundays and holy days.
388. Priests are encouraged to give a brief homily at all Liturgies they celebrate.
389. The priest and deacon are to give high priority in preparing and delivering quality homilies, remembering that on no other occasion will they have the opportunity of reaching so many faithful with the Word of God.

### **Spiritual Guidance**

390. Priests and deacons are to provide individual and family spiritual guidance only.
  - a) If a priest or deacon is not a certified counselor, he should refer people to others who have the specialized training and whose methods are in keeping with the teachings of the Church.
  - b) Refer to the local Roman Diocese for a list of certified counselors.

### **Pastoral Skills**

391. As the pastor or administrator, the priest strives to
  - a) Build a Faith Community;
  - b) Organize parish work and assign and supervise it in an effective manner while promoting teamwork and coordination among the pastoral staff, if there is one;
  - c) Make decisions based on his own reflection, prayer and the input of others and the particular needs of the community;
  - d) Handle satisfactorily the usual management responsibilities of program planning and operation, parish finances, plant maintenance, budget planning, fund raising, etc.

## **Pastoral Attire**

392. Whenever a priest is engaged in public, priestly or pastoral work, he will wear suitable ecclesiastical attire.

## **Pastor's Responsibility**

393. The pastor, by virtue of his office, is responsible for the daily administration of the parish entrusted to his care and is responsible for making decisions within the parish and for supervising all parish policies and expenditures
394. Although it is not necessary that the pastor perform all the duties of running a parish by himself—which in some cases is impossible—it is necessary that the pastor understands all aspects of the administrative operations in order to oversee properly these activities.
395. The pastor is accountable to the Eparchial Bishop for the proper management of the finances, physical plant, real estate, risk management, and issues of legality of the parish under his care.

## **Finances**

396. The financial obligations of the pastor include:
- a) Keeping accurate financial records according to the Directives issued by the Eparchial Finance Officer and Finance Council;
  - b) Making sure that regular financial obligations to the Eparchy (Cathedraicum, Medical Insurance, Pension Fund contributions, etc.) are paid on time;
  - c) Budgeting and controlling cash flow;
  - d) Managing parish assets;
  - e) Complying with federal, state, and eparchial reporting requirements.

## **Physical Plant**

397. In terms of physical environment of the parish plant, the pastor is responsible to oversee:

- a) that the maintenance of the buildings and the grounds are in proper repair;
- b) that the size and number of facilities for parish activities and worship is adequate.

### **Real Estate**

398. The pastor is responsible for:

- a) Initiating recommendations to the Eparchial Bishop regarding sale, acquisition or lease of real estate, none of which are to be finalized without the written permission of the Eparchial Bishop;
- b) Filing for property tax exemptions on qualified parish property;
- c) Timely payment of property taxes on any non-exempt parish properties.

### **Risk Management/Insurance**

399. To ensure the safety of the people and assets of the parish, the pastor:

- a) Takes all reasonable measures to prevent accidents; (See #21-33)
- b) Provides for proper insurance coverage for parish property, vehicles and activities;
- c) Furnishes timely and accurate reports of accidents, injuries, serious illness or death occurring on church property or on church outings to the proper agencies and to the Eparchial Bishop

### **Legal Issues**

400. The pastor also has the obligation to protect the parish and Eparchy from adverse legal action, by:

- a) Compliance with all Safe Environment requirements as mandated and found in Appendix D (Section 13);
- b) Knowledge of the legal status and requirements affecting the parish;
- c) Compliance with all federal, state, and local laws that apply to the parish and its personnel;

- d) Proper reporting of all incidents or probable violations that may lead to litigation;
- e) Referral of news media personnel to the Pastoral Center in the event of threatened litigation of a public and potentially scandalous nature;
- f) Protection of the Church's tax exemption status through strict adherence to the Eparchial policy prohibiting parish political activity or endorsement or censure of a politician or one seeking election

### **Physical Safety of Clergy & Religious**

- 401. In the face of an increasing number of crimes which target churches, rectories and convents, great care is to be taken to ensure the safety of the clergy and religious against acts of violence.
- 402. In light of these circumstances, the following precautions should be taken by everyone:
  - a) Provide ample lighting at night around the church, rectory, convent and other buildings; (See also #25)
  - b) Be certain that windows and doors are secured and security screen doors are installed on the outside rectory and office doors;
  - c) Do not allow strangers into your church (other than for services), rectory or convent especially at night;
  - d) Strangers coming to your door are to be treated with the utmost caution;
  - e) The charity you choose to do within the parish can be handled in the usual manner, but strangers should be referred to the local Catholic Charities or other agencies;
  - f) Do not broadcast by your speech or actions that you have money or that money is kept in the rectory or convent;
  - g) Unless you know the person who is calling, be hesitant to answer sick calls in the night, or go with someone else, ie, the police.



## **Retirement**

403. Eparchial priests have the responsibility of preparing themselves financially for retirement. Consideration should be given to setting aside personal funds to augment their pensions and Social Security if they qualify.
404. Retired priests are responsible for providing their own housing, daily living arrangements, and automobile expenses including insurance.
405. All eligible eparchial priests are entitled to retire with a pension of three-fourths of the salary of a pastor per month from the Priests' Retirement Fund and with continued health care benefits (MPL Canon 297 §2).
406. All priests and deacons must submit their resignation to the Eparchial Bishop at the age of seventy-five.
407. If the priest desires to remain in active parish ministry, he can indicate this desire to the Eparchial Bishop.
408. It is the right of the Eparchial Bishop to decide if the resignation is accepted or postponed on a yearly basis.
409. Deacons and non-enrolled priests are not entitled to a retirement pension from the Eparchy.
410. If possible, retired priests and deacons are encouraged to participate in the liturgical and social life of the closest Byzantine Catholic Church. They are to be supportive of the local pastor and not interfere in the administration of the parish.
411. Upon retirement, priests are to keep the Pastoral Center informed of their address so that the pension check can be mailed monthly.
412. If the resignation is accepted, the pension benefits will commence on the first day of the month subsequent to the effective date of resignation.

### **Priests' Retirement Fund**

413. The Eparchial Bishop is to establish an independent Priests' Pension program in order to provide eligible eparchial priests with a just pension as determined by the *Particular Law of the Byzantine Metropolitan sui juris Church of Pittsburgh*.

414. It is the responsibility of the Eparchial Finance Officer to monitor the insurance policies and benefits for retired priests.

## **Vacations and Day Off**

### **Vacations**

415. In accordance with the *Particular Law of the Byzantine Metropolitan sui juris Church of Pittsburgh*, Canon 392, each priest with an assignment in the Eparchy is entitled to thirty days of vacation each calendar year, including three Sundays.
416. The vacation may be taken at one time or spread over the calendar year.
417. The priest is not to be absent from his parish on the days of precept (Theophany, Ascension, SS. Peter and Paul, Dormition and Christmas), Pentecost and from the first day of the Great Fast through Bright Monday.
418. Vacation time not taken during the calendar year may not be transferred to the following year without the Eparchial Bishop's written permission.
419. Spiritual retreats, days of recollection, clergy conferences, ongoing education programs, and for conventions, meetings, workshops, etc. related to non-parochial eparchial assignments are not counted as vacation days provided they are approved by the Eparchial Bishop.
420. Each priest is to provide the Eparchial Bishop with the name and phone number of a person who will know the whereabouts of the vacationing priest and how to contact him in case of an emergency.
421. The parish will pay the stipend and travel expenses for a substitute priest for three vacation Sundays each calendar year.
422. A priest absent from his parish for more than three Sundays a year must pay the stipend and travel expenses of the substituting priest from his personal funds, unless he is away for an approved eparchial reason.

### **Day Off**

423. Each priest is entitled and encouraged to take a day off each week. The day is of a twenty-four hour duration.

## **Wives of Clergy**

424. The deacon's wife has no proper title.
425. The proper title for a priest's wife is *Pani*, unless she uses chooses to be called by her first name or Mrs.
426. The wives of clergy are to support their husbands in their ministry and to be as active in the life of the parish as they wish.
427. The wives of clergy must remember that their words and actions will be scrutinized by the faithful, and therefore they should speak and act with great prudence.

## **Lay Persons in General**

428. Canon 909 establishes canonical age.
  - a. A person who has completed the eighteenth year of age is considered an adult.
  - b. A person who has completed the seventh year of age and up to eighteen is considered a minor
  - c. A person under the completion of the seventh year is considered an infant.
429. Pastors should periodically review with the faithful, the rights of the laity as found in Canons 7-26.
430. Parishioners are entitled to quality homilies and adult religious education programs in their parishes and missions. (See also #387-388.)
431. Retreats and days of recollection for lay persons are to be strongly encouraged, and the clergy shall endeavor to promote the participation of their parishioners in such activities.
432. Lay persons are obligated to grow spiritually by participating actively in the spiritual, liturgical, educational, evangelizing work of the Church and are strongly encouraged to participate in parish social activity.
433. Lay persons are to be given proper roles in the administration and functioning of the Church as their particular talents warrant.
434. Lay persons are obligated to contribute to the financial support of their Church at the local parish, eparchial and universal levels. The faithful are encouraged to tithe as taught in Sacred Scripture.
435. Lay persons are forbidden to join organizations which contradict the teachings of the Church and/or work against the Church.

## **Membership in a Parish**

436. The Christian Faithful are incorporated into Christ through the Sacraments of Initiation and thereby become members of the Catholic Church which Christ instituted, governed by the Bishop of Rome who is the Vicar of Christ on earth and the Bishops in communion with him. The faithful have membership in a particular eparchy governed by an

Eparchial Bishop who establishes parishes and missions for the spiritual needs of the faithful and to which the faithful attach themselves for their spiritual nourishment.

437. Our parishes welcome Byzantine Catholics and any Catholic
- a) Who is interested in seeking the Lord Jesus Christ through His Word and Sacred Mysteries;
  - b) Who accepts the teachings of the Catholic Church;
  - c) Who will help form a community based on the Lord's love;
  - d) Who is willing to grow as a Christian within the legitimate spiritual traditions of our Byzantine Catholic Church within our American context;
  - e) Who acknowledges the legitimate authority of the Pope, Bishop, and Pastor;
  - f) Who will attend the liturgical services on Sundays and great holydays;
  - g) Who is willing to support the growth of the Church by sharing his/her Time, Talent and Treasure (financial support).
438. To be a recognized member of a parish or mission of this Eparchy, a person/family
- a) Must be registered at the parish or mission;
  - b) Must regularly assist at Sunday and Holyday Divine Liturgy;
  - c) Must regularly contribute to the financial support of the Church.
439. Membership in the parish or mission gives the parishioners the right to have their children receive the Holy Mysteries of Christian Initiation, be married in church, and to be buried from the church.
440. Membership in a parish organization does not constitute membership in the parish.
441. Mindful of the obligation to support one's parish both morally and financially, and for spiritual stability, one should regularly attend one's own parish church.

442. All the faithful enjoying any sort of income are obligated to contribute to the support of their local parish (tithes and donations), to the Eparchy (Bishop's Appeal and special collections) and to the Apostolic See (Peter's Pence), so that these might continue their works of charity and the fostering of the Christian life.

- a) A tithe or just portion of one's income is to be given by all;
- b) All the faithful are entitled to an annual report from the parish listing the amount they donated during that calendar year. (See # 224.)

### **Transfer of Ritual Church**

443. While clergy are forbidden to induce a person to transfer from one Ritual Church to another, formal transfers are not discouraged. Clergy are to be aware that any member of the Catholic Church may participate in the spiritual and liturgical life of any other Catholic Church *sui juris* even on a permanent basis, even without a transfer.

444. Pastors should be alert to the potential problem of jurisdiction in the Holy Mystery of Crowning in Marriage if one or both persons are not members of the Byzantine Catholic Church *sui juris*. In case of doubt, our eparchial Tribunal should be consulted.

445. A person may request a canonical transfer to the Byzantine Catholic Church for the following reasons:

- a) The return to the Byzantine Catholic Church *sui juris* of one's ancestors;
- b) Family unity;
- c) Enhancement of the Christian life in an individual or particular circumstance for the salvation of one's soul.

446. The person requesting a transfer must:

- a) Be in good standing and an active member of one of our parishes for at least one year;
- b) Be in good standing with his/her own Church *sui juris*;
- c) Have good reasons for requesting the transfer;

- d) Be mentally balanced and understand what he/she is requesting;
  - e) Have the intention of remaining in the new Church *sui juris* permanently;
  - f) Request this transfer freely.
447. Married couples must submit individual petitions.
448. Children who have not completed their fourteenth year are automatically transferred with their parents. If only one parent transfers, both parents must mutually agree to the transfer of the children (Canon 34).
449. The norms of the *Code of Canons of the Eastern Churches*, specifically Canons 29-38, are to be followed.
450. The person who wishes to transfer must know that the transfer is permanent, except for children under 14 years.

### **Procedures**

451. The person requesting the transfer must discuss the issue with his/her Byzantine Catholic pastor.
452. The requesting person must write a formal petition to the Eparchial Bishop of Phoenix in which he/she states the following:
- a) his/her name and address;
  - b) date and place of birth;
  - c) current membership in the autonomous Church from which he/she is seeking a transfer;
  - d) marital status;
  - e) brief summary of his/her spiritual journey leading to this request;
  - f) the reasons for requesting this transfer;
  - g) a statement of freedom in making this decision;
  - h) family situation;

- 1) Children under 14 years of age listed in the petition and inclusion of their Baptismal certificates;
  - 2) Parents agreement to the transfer;
    - i) signature of the adult petitioner;
    - j) understanding of the permanence of the transfer.
453. The petition must include a copy of the person's Baptismal certificate issued within the last six months.
454. The person's pastor must write to the Eparchial Bishop and state his reasons for supporting this petition.
455. The pastor mails the petition, the Baptismal certificate and his own letter to the Eparchial Tribunal. After a canonical review of the petition by the Tribunal, the petition is sent to the Bishop who will do the final review.
456. If the petition is accepted, the Eparchial Bishop sends a letter affirming the petition along with the necessary documentation to the proper Diocesan Bishop in whose territory that person resides.
457. The Diocesan Bishop reviews the petition and responds to the Eparchial Bishop in writing affirming or denying the request.
458. According to Canon 32 if the both Bishops approve the transfer, the Eparchial Bishop can issue a decree of transfer with the presumed permission of the Holy See.
459. If the Diocesan Bishop does not give consent, the Eparchial Bishop may have recourse to the Apostolic See.
460. The formal decree of transfer is sent to the pastor.
461. The transfer takes effect at the moment a declaration is made and signed by the petitioner before the pastor and two witnesses unless the decree provides otherwise (Canon 36). Since this is not a liturgical act, the signing of the decree should not be incorporated into a liturgical celebration.
462. The signed declarations:
  - a) one is to be kept by the pastor who will record it into the parish Baptismal Register;



- b) another is to be sent to the Judicial Vicar who will contact the church of Baptism and request that it be notated in the Baptismal Register (Canon 37)
- c) The final document is given the transferee for his/her records.

### **Transfer of Ritual Church at Marriage**

- 463. Canon 33 of the *Code of Canons of the Eastern Churches* states that an Eastern Catholic wife is at liberty to transfer to the Church of her husband at the celebration of or during their marriage. This does not apply for an Eastern Catholic husband wishing to transfer to his wife's ritual church.
- 464. Canon 112 §2 of the Latin *Code of Canon Law* states that a Latin spouse—husband or wife—may transfer if he or she declares at the time of marriage or during marriage that he or she is transferring to the Ritual Church *sui juris* of the other spouse.
- 465. For good order, the following procedure for this transfer is to be observed:
  - a) The person should make the statement in writing and sign it before a priest and two witnesses after the marriage takes place;
  - b) This statement should be kept with the marriage file;
  - c) A notation should be made in the Sacramental Register for Matrimony in the notation column;
  - d) The pastor/administrator is to notify the Church of Baptism.

## Burial and Cremation

466. All Catholics and Catechumens must be given an ecclesiastical funeral unless they are deprived by the law (Canon 875).
467. The burial of the body is the preference and customary practice of the Church. (Canon 876.3).
468. Those who choose cremation for their bodies, unless the choice was made for reasons contrary to the conduct of Christian life, are to be granted an ecclesiastical funeral. (Canon 876.3)
469. The Church strongly emphasizes that cremation should take place only after the Funeral Liturgy is held with the full body present. However, it is permissible to have the funeral with the cremains present.
470. If the purpose of seeking cremation, in a particular case, is to deny the immortality of the soul, the dignity and resurrection of the body, to reject Christian dogma, to express hatred for the Catholic faith or to deny life after death, funeral services are to be denied.
471. The cremains should be buried reverently in the ground, a mausoleum, or columbarium.

## Fasting Regulations

472. The Byzantine Catholic Metropolitan Church *sui juris* of Pittsburgh observes the following four seasonal observances (MPL Canon 880 §2):
  - a) **The Philip's Fast:** the forty-day fasting period which begins on November 15th and concludes on December 24th;
  - b) **The Great Fast:** the forty-day fasting period which begins on Pure Monday and concludes on the Palm Friday, and is extended by the **Fast of Holy and Great Week** through Holy Saturday.
  - c) **The Apostles' Fast:** the variable (8-42 days) fasting period which begins on the Monday after All Saints' Sunday and concludes on June 28th;
  - d) **The Dormition Fast:** the fourteen-day fasting period which begins August 1st and concludes on August 14th.

### **Simple Fast or Abstinence**

473. Simple fast or abstinence forbids the use of meat and meat products, but does not forbid the use of eggs and dairy products.
474. Simple fast or abstinence is required on
- a) All Wednesdays and Fridays of the Great Fast;
  - b) All Fridays of the other three Penitential Seasons. It is also highly recommended on the Wednesdays;
  - c) On all Fridays of the year or an equivalent penance is to be observed, except during the festive observances as found in the Number 482.

### **Strict Fast**

475. Strict Fast forbids the use of meat, eggs, and dairy products.
476. Strict Fast is observed on the First Day of the Great and Good Friday. (See also MPL 880.)
477. It is highly commendable but not required on the Vigils of Christmas and Theophany, Holy Saturday, Exaltation of the Holy Cross and the Beheading of John the Baptist. On these days simple abstinence is highly recommended.

### **Age Requirements**

478. Strict and simple fast or abstinence binds all the faithful of the Eparchy of Phoenix.
479. Priests and parents are to see to it that minors are educated in the authentic sense of penance.

### **Dispensations**

480. Expectant and nursing mothers, infants and those who are in poor health are exempt from the laws of strict fast.
481. Pastors and religious superior, for a just cause, may grant to individuals and families a dispensation or commutation of the prescribed strict or simple fasts to another equivalent penance.

### **Non-Fasting Periods**

482. The periods during which fasting is not required:
- a) The week following the Sunday of the Publican and the Pharisee;
  - b) Bright Week;
  - c) Pentecost Week
  - d) The Post feast: Nativity of the Lord: (December 25—January 4);
  - e) Major Feasts of the Lord and the Theotokos, if they fall on a Friday.

### **General Liturgical Directives**

483. Faithful to the ancient tradition of our Eastern Church and following the example of the great Apostles to the Slavs, Cyril and Methodius, the official liturgical language of our Eparchy of Phoenix is English. However, other languages may be used with the permission of the Eparchial Bishop.
484. The Divine Services are to be celebrated according to the directives established by the Council of Hierarchs as published in the officially promulgated liturgical books. The use of any other books or rubrics not in conformity with the above sources is hereby forbidden.
485. The *Typikon* published annually by the Reverend David M. Petras is to be used as a guide for the celebration of the Divine Services.
486. When an immoveable feast falls on a Sunday, only one epistle and one gospel may be read. If it is a major feast, the readings of the feast take precedence, otherwise the priest may choose the readings either of the Sunday or the feast.
487. According to the tradition of the Church confirmed by Ecumenical Councils, the faithful are not to kneel from Vespers on Saturday evening until the Vespers of Sunday night, but rather to stand in celebration of the Resurrection of Christ.
488. The liturgical postures are standing, sitting, kneeling, and prostrating as dictated in the liturgical books with exceptions noted in the *Pastoral*

*Handbook.* The Faithful who cannot physically stand for long periods of time are to be encouraged to sit.

489. Provisions are to be made in each parish and mission that the faithful know what pages the changeable parts are located for that particular service so that the flow of the prayer is not interrupted by announcements.
490. Items which have a proper place on the Holy Table are the tabernacle, gospel book, antimimension, hand cross, liturgicon or other liturgical books, candelabra, spoon, lance and lention. Flowers may be used in the sanctuary provided they are not on the Holy Table and do not obstruct the flow of the liturgical service. Care should be taken that other items are not found on the Holy Table.
491. Care is to be taken that altar linens are cleaned regularly.
492. Except during Bright Week the deacons doors are always closed unless one must pass through them (Ordo #19a).
493. It is preferred that announcements be made after the last blessing and before the "Glory to You, O Christ God our hope, glory to You".

### **Directives for Divine Liturgy**

494. The Divine Liturgy of St. John Chrysostom is celebrated on all Sundays, weekdays, and holydays, except those days which are aliturgical or on when the Divine Liturgy of St. Basil is prescribed.
495. The Divine Liturgy of St. Basil the Great is celebrated on
  - a) December 24<sup>th</sup> or 25<sup>th</sup> according to the Typikon;
  - b) January 1st, the Feast of St. Basil the Great;
  - c) January 5<sup>th</sup> or January 6<sup>th</sup> according to the Typikon;
  - d) All the Sundays of the Great Fast for at least one Liturgy if the parish has multiple Sunday Liturgies
  - e) Holy Thursday and Holy Saturday.

496. The Liturgy of the Presanctified Gifts is celebrated only on
- a) Pure Monday (if desired);
  - b) All the Wednesdays and Fridays of the Great Fast unless that day is March 25<sup>th</sup>;
  - c) The Fifth Thursday of the Great Fast (Andrew of Crete), and minor feasts according to the Typikon;
  - d) Holy and Great Monday, Tuesday and Wednesday, unless the day is March 25<sup>th</sup>.
497. Each parish is to have at least three copies of the Liturgicons for the Divine Liturgy of St. John Chrysostom, St. Basil the Great, and the Liturgy of the Presanctified Gifts for the use of concelebrants should there be any.
498. The Divine Liturgy may be celebrated at any suitable time. The Vigil Divine Liturgy is to be celebrated no earlier than 4:00 PM (MPL, Canon 707 §1.4).
499. On vigils of holydays, pastors are encouraged to celebrate Vespers or Vespers with Divine Liturgy.
500. Red wine is preferred for the celebration of the Divine Liturgy.
501. Bread for the Eucharist is to be made only of wheaten flour, water, and yeast. The prosphora bears the seal (IC XC NI KA) (MPL, Canon 707 §1.1).
502. The minimum Eucharistic fast is from solid food for one hour before the reception of the Divine Eucharist. Medications and water may be taken anytime (MPL, Canon 707 §1.2).
503. Regarding the use of the Antimension,
- a) Crumbs that accumulate on the Antimension are to be reverently consumed or disposed in the sacrarium.
  - b) A soiled Antimension is not to be washed but rather a new one should be requested from the Eparchial Bishop as soon as possible. Once a new antimension is received, the soiled one is to be returned to him.

504. Only a Bishop, a priest or a deacon may preach the homily (MPL, Canon 707 §1.7).

### **Liturgical Directives for the Great Fast**

505. The Liturgy of the Pre-Sanctified Gifts takes precedence over all other Great Fast devotions.
506. The Liturgy of the Pre-Sanctified Gifts is to be celebrated on the prescribed days normally after 4:00 PM. However, for a good reason, the Eparchial Bishop may give special permission to celebrate it earlier, but never before 12 Noon.
507. Unless the Feast of the Annunciation falls on a weekday, the Divine Liturgy is not to be celebrated on the weekdays of the Great Fast, except with the explicit permission of the Eparchial Bishop for very special circumstances.
508. In place of the daily Divine Liturgy, pastors are to offer other services in keeping with the tradition of the Byzantine Catholic Church, namely Great Fast Matins, Vespers, Hours, or Compline during which Holy Communion may be distributed.
509. The All Souls' Divine Liturgies are to be celebrated on the designated Saturdays with the reading of the Diptychs for the deceased. This is to take place at the Divine Liturgy during the Litany for the Deceased or during a Panachida service at the end of Liturgy, but not during both.
510. Priests are encouraged to take the Akathist Hymn on Akathist Saturday.
511. Bright vestments are to be worn on the Sundays of the Great Fast, except on the Third Sunday when red vestments are prescribed for the Holy Cross.
512. Services borrowed from other traditions are not to be used.

### **Liturgical Directives for Holy Week**

513. The Services for each day of Holy Week are to be celebrated according to the liturgical texts officially approved for use in the Metropolia and by the Eparchial Bishop of Phoenix.

514. Only the Liturgy of the Presanctified Gifts is to be celebrated on Holy Monday, Tuesday and Wednesday, except when the Feast of the Annunciation falls on one of those days.
515. The following services for Holy Week must be celebrated in every parish and mission having a full-time priest and ordinarily no earlier than 4:00 PM:

a) **Great and Holy Wednesday:**

The Liturgy of the Pre-Sanctified Gifts with the Holy Anointing of the Sick incorporated into the service. This service may be celebrated from 12 Noon on.

If, for Pastoral reasons, the Service of the Holy Anointing is celebrated earlier in the day, then only the Liturgy of the Pre-Sanctified Gifts need be celebrated later.

b) **Great and Holy Thursday:** The Vesper Divine Liturgy of St. Basil the Great;

c) **Great and Holy Friday:** The Entombment Vespers;

d) **Great and Holy Saturday:** The Vesper Divine Liturgy of St. Basil the Great.

516. Regarding Good Friday the following are to be observed:

- a) The Passion Matins (Strasti) with the reading of the 12 Gospels is to begin no later than Noon;
- b) The Royal Hours may be taken no earlier than 9:00 AM and no later than 3:00 PM, but only after Good Friday Matins;
- c) If no clergy are available, lay members of the parish known for their piety and commitment to the Church may carry the Holy Shroud during the procession at the end of the Entombment Vespers;
- d) The practice of placing the Divine Eucharist on the grave after the procession is strictly forbidden.

517. Regarding Holy Saturday, the following are to be observed:

- a) Jerusalem Matins may be celebrated no earlier than 10:00 PM on Great and Holy Friday and no later than Noon on Holy Saturday;



- b) During the Vesper Divine Liturgy of St. Basil the Great, the clergy change from dark to bright vestments during the chanting of the verses before the Gospel, *Arise, O God*. The Holy Shroud is then immediately transferred from the grave to the altar.
- c) Since kneeling is a sign of penance, there is to be no kneeling in church or anywhere from chanting of the Gospel at the Vesper Divine Liturgy of St. Basil the Great until the Kneeling Prayers on Pentecost Sunday. (See also # 468)
- d) After the Vesper Divine Liturgy, Paschal foods may be blessed with the singing of the Paschal Troparion.

### **Liturgical Directives for Pascha and Bright Week**

- 518. Resurrection Matins and procession are to be celebrated beginning no earlier than sunset on Saturday and no later than 9:00 AM on Sunday morning.
- 519. If Resurrection Matins is celebrated after 10:30 PM on Saturday, the Divine Liturgy of St. John Chrysostom may follow immediately, with the blessing of paschal foods.
- 520. Commemorations of the living (*Many Years*) or deceased (*Eternal Memory*) are not to be made at the end of liturgical services on Pascha and during Bright Week.
- 521. Beginning Thomas Sunday, the appropriate commemorations of the living (*Many Years*) or deceased (*Eternal Memory*) may be made at the conclusion of the Divine Liturgy with the regular response. The Paschal Troparion (*Christ is risen...*) is not substituted for these responses.
- 522. The Royal Doors and Deacon Doors are to remain open during Bright Week.
- 523. Funerals celebrated during Bright Week are to follow the provisions of *The Office of Christian Burial according to the Byzantine Rite* (Byzantine Seminary Press, 1975 edition pp. 87-107; 1983 edition pp. 147-193).

## **Liturgical Directives for Pentecost**

524. Normally the Kneeling Prayers of Pentecost are taken during Pentecost Sunday Vespers. For pastoral reasons, it is recommended that after the Ambon Prayer on Pentecost Sunday Divine Liturgy and its vigil, at least one Kneeling Prayer be taken.

## **Other Services**

525. During the year pastors are encouraged to provide liturgical services apart from the Divine Liturgy and which are in keeping with the authentic traditions of our Byzantine Catholic Church, such as Vespers, Matins, the Hours, Molebens, Akathist, and Paraklis.

## **Holy Mysteries**

### **Holy Mysteries of Christian Initiation**

526. Clerics are to be familiar with Canons 675 through 717. Pastors are to see that these Canons are implemented in the parish or mission.
527. The text to be followed for the celebration of the Mysteries of Christian Initiation is that which has been jointly promulgated by the Eparchies of Parma and Van Nuys on June 29, 1994. This text shall be in use in the Eparchy until replaced by an English text approved by the Council of Hierarchs.
528. Regarding sponsors for Baptism:
- a) One sponsor must be a practicing Catholic and in good standing in his/her ritual Church. If the sponsor is not a member of the parish where the Baptism is to take place, the sponsor's pastor must provide written documentation that they are practicing and in good standing;
  - b) The sponsor must be at least 16 years of age (See also MPL 685 §2);
  - c) Pastors should be aware that being a sponsor for Baptism creates a spiritual relationship which is an impediment to marriage between the sponsor and the one baptized.
529. There is to be a preparatory instruction for parents and sponsors prior to the celebration of Christian Initiation.

530. Christian Initiation is a public act of the whole Church. It is to be celebrated together with the Sunday Divine Liturgy. Baptisms outside of the Divine Liturgy are discouraged.
531. In accordance with the ancient traditions of our Byzantine Catholic Church, the Divine Eucharist is to be given to a person at the time of Baptism/Chrismation, regardless of the person's age (See MPL 697 §1).
532. If the Holy Mysteries of Christian Initiation are celebrated outside of the Divine Liturgy, the following are to be observed:
- a) The Precious Blood is to be reserved from that day's Divine Liturgy and to be used to communicate the newly baptized (See also MPL 697 §2).
  - b) If it is not possible for the newly baptized to receive the Divine Eucharist at the time of Baptism/Chrismation, he/she is to receive the Divine Eucharist the next time he/she is present at the Divine Liturgy (See also MPL 697 §3).
  - c) It is the moral responsibility of the parents, godparents and pastor that the newly-baptized receives the Divine Eucharist in these circumstances.
533. After the reception of the Mysteries of Initiation, an infant should continue to receive the Precious Blood at any celebration of the Divine Liturgy.
534. An infant is to receive only the Precious Blood from the communion spoon until such time as the parent notifies the priest that the child may take a portion of the Precious Body (See also MPL 710 § 1 and 2).
535. Infants and children who have already received the Mysteries of Baptism and Chrismation may be brought forward for Holy Communion, provided that their parents have undergone a proper catechesis.
536. The practice of First Solemn Communion for those who have received the Divine Eucharist at the time of their Christian Initiation is strictly forbidden.
537. The Catechumenate and the proper times for the Christian Initiation of Adults are to be observed whenever possible.

538. The unbaptized who have reached an age of understanding sufficient for catechesis are to be brought into the Church through the Catechumenate.
539. A member of the Christian faithful of an Eastern non-Catholic Church is to be received into the Catholic Church with only the Profession of Faith after doctrinal and spiritual preparation.
540. Whether it is an individual or a group, no obligation except what is necessary to correct knowledge of the Faith can be imposed on those who have been baptized in a non-Catholic Church or ecclesiastical community and who ask to enter into full communion with the Catholic Church.
541. The priest who baptizes is to record the fact along with a notation of the ascription to a certain *sui juris* Church, in the Baptism Register of the Parish where the baptism took place. After the names of the parents, the priest is also to note the *sui juris* church to which each parent belongs at the time of Baptism if they do not belong to the Byzantine Catholic Metropolitan Church *sui juris* of Pittsburgh. (See also #113.)
542. Except in danger of death, the parish church is the proper and only place for the celebration of Baptism (See also Canon 687).
543. As a guide, the following are some non-Catholic churches which may
- a) Valid Baptisms: all Eastern Orthodox Churches; Adventists, African Methodist Episcopal, Amish, Anglican, Assembly of God, Baptists, the Christian & Missionary Alliance, Church of the Brethren, Church of God, Congregational Church, Disciples of Christ, Episcopalians, Evangelical Churches, Evangelical United Brethren, Liberal Catholic Church, Old Roman Catholics, Polish National Church, Presbyterian Church, Reformed Church of Christ.
  - b) Invalid Baptism: Apostolic Church, Bohemian Free Thinkers, Christadelphians, Christian Community (Rudolf Steiner), Christian Scientists, Church of the Divine Science, Jehovah's Witnesses, Mason (no baptism at all), the New Church of Mr. Emmanuel Swedenborg (in the USA known as the Church of the New Jerusalem), Mormons, Pentecostal churches, Peoples Church of Chicago, Quakers, Salvation Army, Unitarians.
  - c) In case of doubt, a person should be baptized conditionally.

544. In ascertaining the validity of a Baptism, the names of the three Person of the Trinity must be invoked as the Father, Son and Holy Spirit with the use of natural water.

### **Chrismation**

545. In those special circumstances where an individual was baptized in the Roman Church or a non-Catholic Church and has not yet received the Holy Mystery of Chrismation, all pastors may chrismate with one anointing on the forehead and without recourse to the Eparchial Bishop.
546. When celebrating Chrismation apart from Baptism, a special entry must be made in the proper section of the Sacramental Register used for Chrismation unless the person is being received into the Church.
547. The Holy Mystery of Chrismation is to precede the reception of the Divine Eucharist.

### **Eucharist**

548. If they are properly disposed, the faithful are encouraged to receive the Divine Eucharist at each Divine Liturgy they attend, especially during Pascha. They are also encouraged to receive the Divine Eucharist if they are in the danger of death. (See also Canon 708.)

### **Reconciliation**

549. Priests are to be familiar with Canons 718 through 736. Pastors are to see that these Canons are implemented in the parish or mission.
550. Pastors are to see to it that the Faithful entrusted to their care have ample and convenient opportunities to receive the Holy Mystery of Reconciliation weekly.
551. During the Philip's Fast and the Great Fast, the pastor should invite additional priests to be available for this Mystery.
552. Pastors are to see to it that children are properly prepared to receive the Holy Mystery of Reconciliation at the age of seven or eight.

### **Crowning in Marriage**

553. Priests are to be familiar with Canons 776 through 866. Pastors are to see that these Canons are implemented in the parish or mission.

554. The celebration of the Holy Mystery of Crowning in Marriage may take place only in a church or other sacred place. Marriage ceremonies are not to take place in parks, gardens, hotel, homes, etc., unless for a good reason in which case the explicit permission of the Eparchial Bishop is required. (See also Canon 838.)
555. Persons seeking to be married must be parishioners for at least six months prior to their six month preparation period unless the pastor accepts a couple for marriage from another parish in agreement with the previous pastor.
556. A six month period of preparation before marriage is mandated in this Eparchy.
557. No date for marriage should be set until the Pre-Nuptial Investigation is completed and the appropriate Baptismal certificates are in the possession of the pastor so as to ascertain that there are no impediments to the marriage.
558. Besides the usual questioning concerning background and impediments, couples preparing for marriage should be given an approved premarital inventory designed to spot problem areas in advance of the marriage (See also MPL 784 §1 and 2).
559. The pastor or administrator has the right to deny marriage if there is any doubt regarding the stability of the impending marriage or lack of proper attitude during the couple's preparation.
560. All marriages celebrated within the parish, even if the Byzantine Marriage Ceremony is celebrated in a Roman Church, must be recorded in the Byzantine Parish Marriage Register.
561. Even if one person is Byzantine Catholic, a dispensation from Canonical Form is reserved to the Apostolic See and cannot be granted by any Eparchial or Diocesan Bishop. The request for this dispensation is to be sent to the Judicial Vicar who will request it from the Apostolic Nuncio who has the delegated faculty to grant this dispensation for all Eastern Catholics living in the United States.
562. Delegation to marry two Roman Catholics or a Roman Catholic and a non-Catholic is obtained from the proper Roman bishop.
563. For a licit celebration of marriage, a person must be at least the minimum age required by the State where the marriage is to take place (See MPL 800 §2).

564. The Metropolia Particular Law regarding the promises made by the Catholic party of a mixed marriage are to be observed (See MPL 815 §1).
565. When a couple requests a solemn betrothal (engagement service), it is to be celebrated according to the prescriptions of our liturgical books (See MPL 782 §1).
566. The Marriage Ceremony with the Divine Liturgy should not be celebrated when one person is a non-Catholic.
567. Marriage is to be celebrated by the pastor of the groom unless either particular law determines otherwise or a just cause excuses. (See Canon 831 § 2.)
568. It is recommended that marriages not be celebrated during the Great Fast and Great and Holy Week. (See also MPL 838 § 2).
569. Although the practice of the priest leading the bride and groom down the aisle is proper, it is permissible for the priest to permit the father and/or mother of the bride to walk the daughter down the aisle according to the American tradition.
570. In the premarital instruction, the priest is to remind the couple that they are not to be impaired by alcohol and/or drugs before the marriage ceremony.
571. Marriage is to be recorded in the parish sacramental register and notifications sent to the Churches of Baptism. (See also Canon 841)

### **Anointing of the Sick**

572. Priests are to be familiar with Canons 737 through 742. Pastors are to see that these Canons are implemented in the parish or mission.
573. Priests are to keep records of the sick whom they visit and the Holy Mysteries the sick received at each visit.

### **Holy Orders**

574. The names of candidates for sacred ordination to the diaconate and priesthood are to be announced publicly in his parish church on at least three consecutive Sundays and/or holydays of precept prior to ordination with the faithful admonished to make known any serious reason why the man should not be ordained (See MPL 771 §1.1 and 2).

## Care of Vocations in General

575. The vocation to the ordained ministry in the Church and/or monastic life is a gift from God to be cultivated and nourished by the individual, the parish community and, in particular, by the local clergy and monastics.
576. The pastor, ever solicitous of the spiritual and formational growth of a vocation, fosters the involvement of the person within the life of the parish community by encouraging active participation in the liturgical life of the community, especially by serving and/or reading or cantoring. The person should be invited by the pastor to attend special services, gatherings, etc., that foster the individual's growth as a member of the community and of the Church.
577. Prospective vocations are encouraged to have a spiritual mentor—either their pastor or some other priest or monastic—to guide them during the time of vocational discernment.
578. A person who wishes to follow Christ as an ordained minister and/or monastic should:
- a) be a person of faith and prayer and demonstrate this by active participation in the liturgical, spiritual, educational and social life of the parish;
  - b) desire to serve Christ and His Church by serving His people;
  - c) possess a good moral character;
  - d) be in good physical and psychological health;
  - e) have the necessary intellectual ability to pursue the required studies.

## Candidates for Ordained Ministry

579. Normally, unless the Eparchial Bishop deems otherwise, a man wishing to serve as an ordained minister in our Eparchy must observe the following:
- a) Canonically a member in the Byzantine Catholic Metropolitan Church *sui juris* of Pittsburgh;



- b) Active participation in the liturgical and parochial life of a Byzantine Catholic parish for at least five years;
  - c) Have spiritual maturity and knowledge of and love for Christ and His Church and, in particular, the spirituality and liturgy of the Byzantine Catholic Church;
  - d) Good physical, mental and moral health;
  - e) Good reputation in the parish and the local community;
  - f) Completed college with a BA degree or its equivalent;
  - g) Have the necessary intellectual ability for the required studies;
  - h) If married, be in a good and stable marriage with family support for ordination,
580. For those seeking formation for Holy Orders, the Eparchial Vocation Director:
- a) should be contacted to assess the man's stage of discernment and to continue the necessary correspondence;
  - b) will contact the Eparchial Bishop to discuss the potential candidate;
  - c) will assist the prospective candidate in the discernment process with the help of his pastor and the Eparchial Bishop.
  - d) will coordinate the necessary application procedures on behalf of the Eparchy and the Seminary.
581. The candidate is financially responsible for his education including travel and living expenses.

## Index

*The number following the entry refers to the individual numbers, not page numbers.*

### A

#### Abstinence and Fasting

- Age Requirements #478-479
- Dispensations #480-481
- Fasting Seasons #472
- Non-Fasting Periods #482
- Simple Fast or Abstinence #473-474
- Strict Fast #475-477

#### Accident Prevention #21-33

- Compliance with civil law #24, 27
- Detectors #27
- Fire Extinguishers #29
- Hazards #22, 23, 24, 25, 28, 30, 31, 32
- Lighting #25, 26
- Prevention #21-33; 36
- Safety Checks #33
- Storage #28
- Weather #22, 23, 30, 31

#### Age, Canonical #428

#### Alcohol Use on Church Premises #34-36

#### Anointing of Sick #572-573

- Deacon may not Anoint #321
- Holy Wednesday #515a

#### Archives, Parish #110-123

- Document Retention #112
- Sacramental Registers #1123-123

### B

#### Baptism

- Ascription into Ritual Church #541
- Baptism by Deacon in Roman Catholic Church #351
- Baptisms outside of Liturgy Discouraged #530
- Churches with Valid/Invalid Baptism #543
- Notification of Church of Baptism #465d, 571
- Proper Place for Baptism #542

*Baptism continued*

Register # 114, 462,  
Sponsors #528  
Trinitarian Formula #544

Bishop's Appeal #194a; 196-199

Building: Construction, Renovation, Remodeling

Architects #44  
Bids #44e  
Blueprints #46  
Church Alterations #37, 49b  
Contracts #45  
Cost #41  
Demolition #49  
Insurance #47  
Permits and Inspections #48  
Remodeling #49

Burial #466, 467

C

Cathedraticum

Date Due #181  
Definition #180  
Dispensation from #181  
Exemption #184, 185-189  
General #178-182  
Gifts  
    Non-designated #190-192  
    Restricted #193  
Subject to #183

Census #50-53

Certificates

Baptismal  
    Adoptions #116-123  
    Transfers #452, 453, 455

Chart of Accounts

Chart of Accounts: App C  
Mandated #204

Chrismation #545-547

Chrismation needed prior to reception of 1<sup>st</sup> Eucharist #531, 547

Deacons may not Chrismate #321

One anointing #545

Record in Sacramental Register #114, 546

Church Use by Others

Ecumenical Services #167, 168

Non Catholic/Non Christian #164-168

Orthodox #166

Other Catholics #169-170

Collections, Special #194-195

Communications

Fax Line #54

Email #54

Websites #55

Computers

Backup #19

Required #19

Cremation #468-471

Crowning in Marriage #553-571

Baptism Certificated Needed Prior to #557

Notification of Church of Baptism #571

Curia of the Eparchy #56

**D**

Days of Precept #384

Deacons

Attire, Clerical #342-345

Bi-ritual deacons #348-351

Enrollment #311, 331-334, 362

Leave of Absence #335-341

Liturgical Role #318-324

Married Deacons #313

Pastor's Support #312, 316

Priorities #313

Salary/Remuneration #317

*Deacons continued*

Visiting #325-330  
Wives #424, 426, 427

Death of Clergy and Hierarchs

Closure of Residence #352  
Funeral Arrangements #356, 357, 361  
Inventory #353, 354  
Memorial Liturgy #358, 359, 360

Divine Eucharist

Fast #502  
Encouraged to Receive #548  
Reception of during Christian Initiation #531-536

**F**

*Fast See Abstinence and Fasting*

Fees, Eparchial

Antimension #74a  
Tribunal #74f

Finances

Accountability #200-228  
Eparchy #209  
Parish #200, 203, 205-208  
Parish organizations #226-228  
Parishioners #224, 225  
Accounts, Signers #213  
Comingling Forbidden #212  
Reports, Annual #222, 223  
Segregation of Financial Responsibilities #229-231

Fiscal Year #20

**H**

Holy Days of Obligation *See Days of Precept*

Holy Mysteries #526-574

Anointing of the Sick #572-573  
Christian Initiation 526-544  
Chrismation #545-547  
Crowning in Marriage #553-571  
Eucharist #548

*Holy Mysteries continued*  
Holy Orders #574, 479, 581  
Reconciliation #549-552

**I**

Iconography/Iconographers #38

Inventory  
Church #86  
Clergy #8

**K**

Kenedy Directory #50-53  
Canonical Age #428

**L**

Lay Persons

Church leadership #433  
Membership: Forbidden Organizations #435  
Membership: Parish  
    General #436, 437  
    Recognized #438  
    Rights and Obligations #439,441, 442  
Spiritual Growth #431,432  
Support of the Church #434, 442  
Transfer of Ritual Church #443-462  
Tansfer of Ritual Church at Marriage #463-465

Liturgical Directives

General #483-493  
    Antimension #503  
    Homily #504  
    Prosfora (Altar Bread) #501  
    Time #498  
    Vesper Liturgy #499  
    Wine: #500

Great Fast# 505-512  
    Annunciation #507  
    Akathist Hymn #510  
    All Souls Liturgy #509  
    Divine Liturgy  
        Not on Weekdays #507

*Great Fast: Divine Liturgy continued*

- Bright Vestments #51
- Eucharist, Reception of #508
- Other Great Fast Services
  - Byzantine #508
  - Non-Byzantine: #512
- Pre-Sanctified Liturgy
  - Precedence #505
  - Time #506

Holy Week #513-517

- Good Friday #515, 516
- Holy Saturday #515, 517
- Holy Thursday #515b
- Holy Wednesday #515a
- Required Holy Week Services #515
- Time #515, 516, 517

Pascha and Bright Week

- Blessing of Paschal Foods #517d. 519
- Commemorations for Living & Departed
  - Pascha and Bright Week #520
  - Rest of Paschal Season #521
- Doors #522
- Funerals #523
- Resurrection Matins
  - Time #518, 519
- Standing #517c

Pentecost: Kneeling Prayers #524

Other Services: Encouraged to Provide Other Liturgical Services #525

Liturgy

- Pre-Sanctified Gifts #496
- St Basil the Great #495
- St John Chrysostom #494

Loans #91-93

- Criteria for Requesting #93

**M**

Marriage *See Crowning in Marriage*

Mission  
Establishment #64-71

**O**

Outreach  
Establishment #57-63

**P**

Parish  
Establishment #72-73

Parish/Mission Advisory Council #96-109  
Ex-officio Members #98  
Meetings #105  
Minutes #104  
Qualifications #102  
Responsibilities #97, 39, 40, 72  
Secretary #104  
Term: #99, 100, 109

Penitential Seasons #472

Political Activities #124-135  
Candidate  
Appearances #131-132  
Surveys #133  
Endorsements #126-128  
Financial Contributions #129  
Literature and Voter Education #130, 134-135

Priests  
Accountability #393-395  
Attire #92  
Compensation #273-307  
Anniversary #307  
Insurance  
Auto #290  
Health #289  
Bonus #301-303, 307  
Eparchy for Clergy Conferences/Retreats #297-300  
Household Expenses #293, 294  
Reimbursement: Moving Expenses #295  
Salary #276, 278, 279, 281-283



*Priests: Compensation continued*

Telephone #291, 292  
Continuing Formation/Education #308-310  
Day Off #423  
Employment Outside Eparchy #280  
Enrollment into Eparchy 362-367  
Liturgical responsibility #382-389  
Loans to Parishes #215, 278  
Medical Disability/Leave #368-378  
Priority #379  
Responsibilities #396-400  
Retirement #287, 288, 403-414  
Safety: Physical #401-402  
Skills #391  
Spirituality, Personal #381  
Vacation #415-422  
Wives #425-427

Property

Gifts #136-142  
Purchase/Sale #143-150

**R**

Rectory #151-161

Cleanliness #152, 154, 155  
Clergy Quarters #151, 152, 160  
Pets #161  
Vacant Rectory #160  
Visitors #157, 158, 159

Retirement #403-412

**S**

Sacraments *See Holy Mysteries*

Safe

Combinations #16  
Required #15

Safe Environment #162-163

Documents Appendix D, Section 14  
Rectory #156

Seal #14

Stipends, Extra Clergy  
Confessions #84  
Sunday/Holyday Liturgies #82  
Travel Expenses #85  
Weekdays #83

Stipends, Liturgical #81  
Cantors #80, 81e, 81f  
Donations for Services (Voluntary) #75, 76, 77  
Mirovanije #79

**T**

Transfer of Ritual Churches #443-465

**V**

Vacations #415-422

Visitation, Bishop #171-172

Visitation, Protosyncellus/Eparchial Finance Officer # 173-177

Vocations #575-578

Formation

Ecclesial #576

Spiritual #577

Qualities #578, 579

Role of the Vocation Director # 580

**W**

Wives of Clergy #424-427

Department of the Treasury  
Internal Revenue Service

89231938

BYZANTINE CATHOLIC BISHOP OF VAN  
NUYS  
5335 SEPULVEDA BLVD  
VAN NUYS CA 91411

Date of This Notice

If you inquire about  
your account, please  
refer to this  
number or attach a  
copy of this notice

07-29-83  
Employer Identification Number  
95-3856347

575 0 55555555  
55555555

**NOTICE OF NEW EMPLOYER IDENTIFICATION NUMBER ASSIGNED**

Thank you for your application for an employer identification number. The number above has been assigned to you. We will use it to identify your business tax returns and any other related documents, even if you have no employees.

Please keep this number in your permanent records. Use the number and your name, exactly as shown above, on all Federal tax forms that require this information, and refer to the number in all tax payments and in tax-related correspondence or documents. You may wish to make a record of the number for reference in case this notice is lost or destroyed.

Note that the assignment of this number does not grant tax-exempt status to nonprofit organizations. For details on how to apply for this exemption, see IRS Publication 557, Tax-Exempt Status for Your Organization, available at most IRS offices.

We appreciate your cooperation.

1103561

ENDORSED  
FILED

In the office of the Secretary of State  
of the State of California

FEB 9 - 1982

MARCH JOHN ELL, Secretary of State

By BILL HOLDEN  
Deputy

ARTICLES OF INCORPORATION  
OF

THE BYZANTINE CATHOLIC BISHOP OF VAN NUYS  
A CORPORATION SOLE

KNOW ALL MEN BY THESE PRESENTS, that I, THOMAS  
V. DOLINAY , Bishop of the Diocese of Van Nuys in California  
of the Byzantine Catholic Church, do hereby, for the purpose  
of administering and managing the affairs, property and  
temporalities of said Church in said Diocese, incorporate as  
a corporation sole, pursuant to and in accordance with the  
laws of the State of California and do hereby certify and  
state as follows:

FIRST: The name of said corporation sole is, and  
shall be:

"THE BYZANTINE CATHOLIC BISHOP OF VAN NUYS"

SECOND: The County in the State of California in  
which the principal office of said corporation sole is to be  
located for the transaction of its business is Los Angeles  
County.

THIRD: The manner in which the office of Bishop  
of said Diocese of Van Nuys is required to be filled, in  
accordance with the laws, rules and regulations of said  
Byzantine Catholic Church, is by appointment of the Pope of  
Rome, who is the head of said Church.

FOURTH: The territory comprising said Diocese of  
Van Nuys, and in which the jurisdiction of said corporation

sole shall be exercised and to which it shall extend, consists of the States of California, Arizona, Washington, Oregon, Alaska, Hawaii, Idaho, Nevada, Montana, Wyoming, Colorado, New Mexico and Utah.

FIFTH: This corporation is organized exclusively for religious purposes within the meaning of §501(c)(3) of the Internal Revenue Code of 1954.

SIXTH: Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from Federal income tax under §501(c)(3) of the Internal Revenue Code of 1954 (or the corresponding provisions of any future United States Internal Revenue Law) or (b) by a corporation contributions to which are deductible under §170(c)(2) of the Internal Revenue Code of 1954 (or the corresponding provisions of any future United States Internal Revenue Law).

SEVENTH: The property of this corporation is irrevocably dedicated to religious purposes. No part of the net earnings of this corporation shall ever inure to or for the benefit of or be distributable to its members, trustees, officers, or other private persons, except that the corporation shall be empowered to make payments and distributions in furtherance of the exempt purposes for which it was formed.

EIGHTH: Upon the winding up and dissolution of this corporation, after paying or adequately providing for the debts and obligations of the corporation, the remaining assets shall be distributed to a non profit fund, foundation

or corporation which is organized and operated exclusively for charitable, educational or religious and/or scientific purposes and which has established its tax-exempt status under §501 (c) (3) of the Internal Revenue Code.

NINTH: I, said THOMAS V. DOLINAY, Bishop of said Diocese of Van Nuys, as aforesaid, am duly authorized by the rules, regulations, laws and discipline of said Byzantine Catholic Church, to organize said corporation sole.

IN WITNESS WHEREOF, I execute these Articles of Incorporation at Van Nuys, California, this 22<sup>nd</sup> day of *January*, 1982.

*Thomas V. Dolinay*  
THOMAS V. DOLINAY  
Bishop of the Byzantine Catholic  
Diocese of Van Nuys

STATE OF CALIFORNIA    )  
                                  )   ss.:  
COUNTY OF LOS ANGELES )

I, THOMAS V. DOLINAY, of Van Nuys, California, first being duly sworn, do hereby depose as follows:

I am the duly appointed, authorized and acting Byzantine Catholic Bishop of the Diocese of Van Nuys, in the State of California, and as such, make this affidavit and verify the foregoing Articles of Incorporation of the

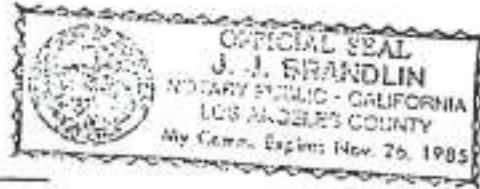
Byzantine Catholic Bishop of Van Nuys, a corporation sole.  
I have read said Articles of Incorporation and know the  
contents thereof. The same is true of my own knowledge.

*Thomas V. Dolinay*  
THOMAS V. DOLINAY  
Bishop of the Byzantine Catholic  
Diocese of Van Nuys

Subscribed to and sworn to  
before me this 21<sup>st</sup> day of

*January*, 1982.

*J. J. Brandlin*  
NOTARY PUBLIC



CALIFORNIA • MICHIGAN • MINNESOTA • MISSISSIPPI • MISSOURI • WEST VIRGINIA • NEW YORK • NEVADA  
NORTH DAKOTA • PENNSYLVANIA • SOUTH CAROLINA • SOUTH DAKOTA • MARYLAND • ARKANSAS  
ALABAMA • COLORADO • ARIZONA • MAINE • TEXAS • UTAH • ALASKA  
IOWA • LOUISIANA • WISCONSIN • TENNESSEE • IDAHO  
GEORGIA • DELAWARE • ILLINOIS • KANSAS • NORTH CAROLINA • OREGON • NEBRASKA • KENTUCKY  
NEW HAMPSHIRE • NEW JERSEY • NEW MEXICO • CONNECTICUT • FLORIDA • MASSACHUSETTS  
HAWAII • WASHINGTON • VIRGINIA • VERMONT • WYOMING • OHIO

1817



2012

# The Official Catholic Directory

Anno  
Domini

2012

Published Annually by  
P.J. Kennedy & Sons



# Holy Protection of Mary Byzantine Catholic Eparchy of Phoenix



Most Reverend  
GERALD N. DINO

Bishop of Eparchy of Phoenix; retained March 21, 1965; appointed Bishop of Phoenix Byzantine December 6, 2007; consecrated and enthroned March 27, 2008. Office: 8105 N. 16th St., Phoenix, AZ 85020.

Chancery Office: 8105 N. 16th St., Phoenix, AZ 85020.  
Tel: 602-861-9778; Fax: 602-861-9796.

Web: [www.eparchyofphoenix.org](http://www.eparchyofphoenix.org)

Email: [subishop@questoffice.net](mailto:subishop@questoffice.net)

ESTABLISHED DECEMBER 3, 1951.

Established in 1951 as the Byzantine Catholic Eparchy of Van Nuys. The name was changed to Holy Protection of Mary Byzantine Catholic Eparchy of Phoenix on February 10, 2010 by the Holy See.

Embraces all Catholics of the Byzantine-Ruthenian Church in the States of California, Oregon, Washington, Idaho, Nevada, Arizona, Utah, Wyoming, Montana, Colorado, New Mexico, Alaska and Hawaii.

Principal Patron—Holy Protection of the Mother of God (Polkov).

Legal Title: Byzantine Catholic Bishop of Van Nuys, A Corporation Sole.

## STATISTICAL OVERVIEW

<b>Personnel</b>			
Bishop	1	Elementary Students	326
Priests: Diocesan Active in Diocese	16	Total Students under Catholic Instruction	604
Priests: Diocesan Active Outside Diocese	1	<b>Vital Statistics</b>	
Priests: Retired, Sick or Absent	5	Receptions into the Church:	
Number of Diocesan Priests	22	Infant Baptism Totals	72
Religious Priests in Diocese	1	Minor Baptism Totals	1
Total Priests in Diocese	23	Adult Baptism Totals	6
Extern Priests in Diocese	3	Received into Full Communion	15
<b>Ordinations:</b>		First Communions	91
Diocesan Priests	1	Confirmations	99
Permanent Deacons	1	<b>Marriages:</b>	
Permanent Deacons in Diocese	12	Catholic	17
Total Brothers	2	Interfaith	2
Total Sisters	3	Total Marriages	19
<b>Parishes</b>		Deaths	38
Parishes	19	Total Catholic Population	2,402
With Resident Pastor:			
Resident Diocesan Priests	17		
Resident Religious Priests	1		
Without Resident Pastor:			
Administered by Priests	1		
Missions	1		
<b>Welfare</b>			
Other Institutions	1		
Total Assisted	26		
<b>Educational</b>			
Diocesan Students in Other Seminaries	2		
Total Seminarians	2		
Catechesis/Religious Education:			
High School Students	77		

**Former Bishops**—Most Revs. THOMAS V. DOLINAY, D.D., ord. May 16, 1948; cons. Nov. 23, 1976; appt. Titular Bishop of Thyatira and Auxiliary of Passaic, Sept. 23, 1976; appt. First Ordinary of the Byzantine Catholic Diocese of Van Nuys, CA; enthroned March 9, 1982; appt. Coadjutor Archbishop of Pittsburgh Byzantine Rite, March 13, 1989; succeeded to June 12, 1991; died April 13, 1993; GEORGE M. KUZMA, D.D. (Retired), ord. May 28, 1935; appt. Auxiliary Bishop of the Byzantine Eparchy of Passaic, Nov. 11, 1998; cons. Feb. 4, 1987; appt. Bishop of Eparchy of Van Nuys Oct. 23, 1999; enthroned as Second Bishop of Van Nuys, Jan. 18, 1991; retired Dec. 5, 2000; died Dec. 7, 2006; WILLIAM C. SKURLA, ord. May 23, 1967; appt. Bishop of Eparchy of Van Nuys Feb. 18, 2002; cons. April 23, 2002; appt. Bishop of Passaic Dec. 6, 2007; enthroned Jan. 29, 2008.

**Chancery Office**—Byzantine Catholic Eparchy of Phoenix, Pastoral Center, 8105 N. 16th St., Phoenix, 85020. Tel: 602-861-9778; Fax: 602-861-9796. Email: [vcnsecretary@questoffice.net](mailto:vcnsecretary@questoffice.net). Web: [www.eparchyofphoenix.org](http://www.eparchyofphoenix.org). Office Hours: Mon-Fri, 10-3.

**Protosynodal (Vicar General)**—Rt. Rev. STEPHEN G. WASHKO. Email: [sspatrial@questoffice.net](mailto:sspatrial@questoffice.net).

**Chancellor**—Rt. Rev. WESLEY W. IZER, S.T.M.

**College of Consultors**—Very Revs. KURT BURNETTE, J.C.L.; JOSEPH HUNTER; Rt. Rev. WESLEY W. IZER, S.T.M.; Very Rev. ROBERT M. PIPTA; Rt. Revs. FRANCIS M. VIVONA, S.T.M., J.C.L.; STEPHEN G. WASHKO.

**Finance Officer**—Rt. Rev. WESLEY W. IZER, S.T.M. Email: [evntreasurer2@aol.com](mailto:evntreasurer2@aol.com).

**Finance Assistant**—Sr. ALPHONSA DANOVICH, O.S.B.M.

**Finance Council**—Rt. Revs. WESLEY W. IZER, S.T.M.; STEPHEN G. WASHKO; Very Rev. KURT BURNETTE, J.C.L.; Sr. ALPHONSA DANOVICH, O.S.B.M.; Deacon JAMES DANOVICH.

**Presbyteral Council**—All priests having a Pastoral Assignment within the Eparchy.

**Secretary for the Presbyteral Council & The College of Consultors**—Rev. JAMES M. LANE.

**Eparchial Tribunal—Office of the Tribunal Eparchy of Van Nuys, P.O. Box 18318, Las Vegas, NV 89114.** Tel: 702-735-1210; Fax: 702-735-6146.

**Judicial Vicar**—Rt. Rev. FRANCIS M. VIVONA, S.T.M., J.C.L.

**Adjutant Judicial Vicar**—Very Rev. KURT BURNETTE, J.C.L.

**Promoter of Justice**—Rev. PETER ROMER, J.C.L.

**Secretary**—Mrs. PAMELA MORLEY.

**Defender of the Bond**—VACANT.

**Judge**—VACANT.

**Auditors**—Rev. MARK GOSKOW; Deacon STEPHEN CASMUS, M.A.

**Notaries**—Mrs. PAMELA MORLEY; Mrs. MARGARITA HERNANDEZ.

**Bishop's Appeal**—Sr. CHRISTOPHER MALDOVSKY, O.S.B.M.

**Building and Sacred Arts Commission**—Rt. Revs. STEPHEN G. WASHKO; WESLEY W. IZER, S.T.M.; Rev. Magr. GEORGE N. VIDA; Deacon JOHN MONTALVO III; Mr. KEVIN KOWALCHUK.

**Director of Religious Education**—Rev. ANTHONY HERNANDEZ; Sr. JEAN MARIE CHOTS, O.S.B.M., Asst. Dir.

**Director of Evangelization**—Rt. Rev. JOSEPH STANCHAL.

**Safe Environment Coordinator**—Sr. JEAN MARIE CHOTS, O.S.B.M. Email: [jean.sister@cox.net](mailto:jean.sister@cox.net).

**Victim Advocate and Assistance Coordinator**—ROSEMARIE LUDWIG, Ph.D. Tel: 602-997-1558. Email: [rtstussy@cox.net](mailto:rtstussy@cox.net).

**Vocations Office**—Very Rev. ROBERT M. PIPTA, D.D.; Rev. MICHAEL O'LOUGHLIN, Asst. Dir.; Deacon JAMES DANOVICH; Sr. JEAN MARIE CHOTS, O.S.B.M.

**Ecclésiastical Notaries**—Rt. Revs. STEPHEN G. WASHKO; WESLEY W. IZER, S.T.M.

**Newsletter**—"Light of the West" KATHLEEN SLOMKA. Editor. Email: [lightofthewest@cox.net](mailto:lightofthewest@cox.net).

**Director of Ecumenical Affairs**—Rt. Rev. STEPHEN G. WASHKO.

**Cantor**—Rt. Rev. FRANCIS M. VIVONA, S.T.M., J.C.L.

**Pro-Life Coordinator**—Rev. LEE PERRY.

**Communication and Eparchial Web Site**—KATHLEEN SLOMKA.

**Parish Committee**—Rt. Revs. STEPHEN G. WASHKO; WESLEY W. IZER, S.T.M.; Rev. Magr. GEORGE N. VIDA; Very Rev. KURT BURNETTE, J.C.L.; Rev. MARK GOSKOW.

**Personnel Board**—Rt. Revs. STEPHEN G. WASHKO; WESLEY W. IZER, S.T.M.; Very Rev. ROBERT M. PIPTA.

**Youth**—Very Rev. JOSEPH HUNTER; Rev. ROBERT BARKIN.

## CLERGY, PARISHES, MISSIONS AND PAROCHIAL SCHOOLS

### STATE OF ARIZONA

PHOENIX, MARICOPA CO., ST. STEPHEN CATHEDRAL (1965) (CEM) Rt. Rev. Stephen G. Washko, Rector; Rev. Deacon Mendonca, Parochial Vicar; Sr. Christopher Malcovsky, O.S.B.M., Admin. Sec.; Deacons John Montalvo III; James Dnasevich; Michael

### Hanafi.

Res.: 8141 N. 16th St. Pmt., 85020-3990. Tel: 602-943-5370; Fax: 602-997-4093. Email: [stpatrial@questoffice.net](mailto:stpatrial@questoffice.net). Web: [www.stateofarizona.org](http://www.stateofarizona.org). Sisters 2.

**Catechesis/Religious Program**—Sr. Jean Marie Chots, O.S.B.M., D.R.E. Students 60.  
**Convent**—St. Stephen Convent, 8141 N. 16th St. #27, 85020. Tel: 602-944-6121; Fax: 602-997-4093. Sisters 3.

GILBERT, MARICOPA Co., ST. THOMAS THE APOSTLE (1982) Rt. Rev. Wesley W. Izar; Deacon Michael Sullivan.  
 Mailing Address: P.O. Box 007, 85205-0007, Tel: 480-497-6720; Fax: 480-497-6726. Email: pastor.st.thomas@aznet.net.  
 Rectory—Tel: 480-584-6676.  
 Church: 10 W. Bruce Ave., 85233.  
 Catechesis/Religious Program—Students 19.  
 TUCSON, PIMA Co., ST. MELARY (1974) Rev. Robert Rankin.  
 Church: 1212 N. Sabuara, 85712-5018. Tel: 520-888-4295; Fax: 520-751-4574. Web: tyzantinetucson.com.  
 Catechesis/Religious Program—Students 22.

**STATE OF ALASKA**

ANCHORAGE, ANCHORAGE Co., SAINT NICHOLAS OF MYRA (1958) Rev. James R. Barrard.  
 Res.: 2250 Arctic Blvd., AK 99503-1909. Tel: 907-377-6731.  
 Catechesis/Religious Program—Students 16.  
 Mission—Blessed Theodora Russian Mission Old Sacred Heart Church, 1201 Begard Rd., Wasilla, AK 99564.

**STATE OF CALIFORNIA**

ANAHEIM, ORANGE Co., ANNUNCIATION (1980) Rev. Mggr. George N. Vida.  
 Res.: 995 N. West St., CA 92801-4305. Tel: 714-533-0292; Fax: 714-981-9735.  
 Rectory—999 N. West St., CA 92801-4305.  
 Catechesis/Religious Program—Students 30.  
 FONTANA, SAN BERNARDINO Co., ST. NICHOLAS (1958) Very Rev. Joseph Hutska.  
 Res.: 9112 Oleander Ave., CA 92335-5599. Tel: 909-822-9917; Fax: 909-822-7663. Email: hutska1009@earthlink.net.  
 Catechesis/Religious Program—Parish: 909-822-7663.  
 FRESNO, FRESNO Co., BYZANTINE CATHOLIC COMMUNITY OF FRESNO, CA, Closed. For inquiries for parish records contact the chancery.  
 LOS GATOS, SANTA CLARA Co., ST. BASIL THE GREAT (1989) Rev. Anthony Hernandez.  
 Res.: 14263 Mulberry Dr., CA 95032-1209. Tel: 408-871-0919; Fax: 408-871-0911. Email: pastor@stbasil.org. Web: www.stbasil.org.  
 Catechesis/Religious Program—Students 2.  
*Salazar Monterey Byzantine Catholic Outreach*—, Location: Blessed Edmund Rice Chapel at Palma High School, 919 Everett St., Salinas, CA. (Div. Liturgy 4th Sat. of month at 4:30 PM), 14263 Mulberry Dr., CA 95032. Email: pastor@stbasil.org. Web: www.bemonterey.org.  
 PALM SPRINGS, RIVERSIDE Co., BYZANTINE CATHOLIC COMMUNITY OF PALM SPRINGS, CA, Closed. For inquiries for parish records contact the chancery.  
 SACRAMENTO, SACRAMENTO Co., ST. PHILIP THE APOSTLE (1971) Rev. Frantisek Murin; Margot Dean, Fin. Admin.  
 Church & Mailing Address: 3895 65th St., CA 95825. Tel: 916-452-1885 (Office); Fax: 916-452-6333. Email: stphilipastor@juno.com.  
 SAN DIEGO, SAN DIEGO Co., HOLY ANGELS (1968) Very Rev. Robert M. Pipta.  
 Mailing Address: 2235 Galahad Rd., CA 92123-3931. Tel: 858-277-2511; Fax: 858-277-5792. Web: www.holyangelsandiego.com.  
 Catechesis/Religious Program—Students 29.  
 SAN LUIS OBISPO, SAN LUIS OBISPO Co., SAINT ANNE

(1986) Rev. James M. Lane; Deacon John Bradley; Mr. Paul Sawko, Fin. Admin.  
 Mailing Address: 222 E. Foothill Blvd., CA 93405-1540. Tel: 805-543-8983; Fax: 805-543-8832.  
 Catechesis/Religious Program—Students 32.  
 SAN MATEO, SAN MATEO Co., ST. MACHINA, Closed.  
 All records at the Chancery Office.  
 SHERMAN OAKS, LOS ANGELES Co., ST. MARY PHOTO-CATHEDRAL (1956) Very Rev. Melvin Rybczyk, C.J., Rector.  
 Res.: 5229 Sepulveda Blvd., CA 91411-3441. Tel: 818-907-8511; Fax: 818-951-7107.  
 Catechesis/Religious Program—5335 Sepulveda Blvd., CA 91411. Cynthia Besak, D.R.E. Students 10.  
 STOCKTON, SAN JOAQUIN Co., BYZANTINE CATHOLIC COMMUNITY OF STOCKTON, Closed. For inquiries for parish records contact the chancery.

**STATE OF COLORADO**

COLORADO SPRINGS, EL PASO Co., BYZANTINE CATHOLIC MISSION, Closed. For inquiries for parish records contact the chancery.  
 DENVER, DENVER Co., HOLY PROTECTION OF THE MOTHER OF GOD (1974) Rev. Michael O'Loughlin; Deacon Andrew Bodnar.  
 Mailing Address: 3074 S. Cook St., CO 80209-4923. Tel: 303-775-8283; Fax: 303-775-8253. Email: pastor@holyprotection.org. Web: www.holyprotection.org.  
 Church: 3291 S. Elizabeth St., CO 80210.  
 Catechesis/Religious Program—Students 17.

**STATE OF NEVADA**

LAS VEGAS, CLARK Co.  
 1—ST. GABRIEL THE ARCHANGEL (1977) Rev. Mark A. Gomez.  
 Church: 2250 E. Maule Ave., NV 89119-4607. Tel: 702-301-2431 (Office); 702-433-1935 (Rectory). Fax: 702-361-3772.  
 Catechesis/Religious Program—Students 13.  
 2—OUR LADY OF WISDOM ITALO-GREEK (1993) Rt. Rev. Francis M. Vivona; Deacon Stephen Cassus.  
 Church: 2120 Lindell Rd., NV 89146. Tel: 702-873-5101; Fax: 702-873-5104. Web: www.ourladyofwisdom.net.  
 Catechesis/Religious Program—Students 38.  
*Our Lady of Mt. Carmel Outreach*—Outreach: 6530 Rubenstein Rd., NV 89140.

**STATE OF NEW MEXICO**

ALBUQUERQUE, BERNALILLO Co., OUR LADY OF PERPETUAL HELP (1974) Very Rev. Kurt Burnette. In Res., Rev. Christopher L. Zupger (Retired).  
 Church: 1837 Alvarado Dr., N.E., NM 87110. Tel: 505-256-1538 (Rectory); 505-269-2877; Fax: 505-256-1278. Web: www.alphan.org.  
 Catechesis/Religious Program—Students 19.  
 LAS CRUCES, DONA ANA Co., BYZANTINE CATHOLIC MISSION, Closed. Records are located at Albuquerque Parish.

**STATE OF OREGON**

PORTLAND, MULTNOMAH Co., ST. BENE BYZANTINE CATHOLIC CHURCH (Rev. Frank Knusel).  
 Rectory—34799 N. Homestead Rd., Scappoose, OR 97056. Tel: 971-322-5646.  
 Church & Mailing Address: 4630 N. Maryland Ave., OR 97217.

**STATE OF UTAH**  
 SALT LAKE CITY, SALT LAKE Co., BYZANTINE CATHOLIC MISSION, Closed. For inquiries for parish records contact the chancery.

**STATE OF WASHINGTON**

OLYMPIA, THURSTON Co., ST. GEORGE BYZANTINE CATHOLIC CHURCH (1989) Rev. Lee Perry; Deacon Joseph Wargocki.  
 Res.: 9739 Yelm Hwy., WA 98512. Tel: 360-413-5651; Fax: 360-413-5651.  
 Catechesis/Religious Program—Students 36.  
 SEATTLE, KING Co., ST. JOHN CHRYSOSTOM (1961) Rt. Rev. Joseph Stanicher.  
 Res.: 1926 S. Lander St., WA 98144-5038. Tel: 206-329-9219; Fax: 206-329-6930. Web: www.stjohnchryso.com.  
 Catechesis/Religious Program—Students 50.  
*Whitcomb, Skagit & Island Outreach*—, Location: Immaculate Conception Church, Mt. Vernon, WA. (Div. Liturgy Sunday at 6:30 PM)  
 SPOKANE, SPOKANE Co., SS. CYRIL & METHODIUS (1979) Rev. William O'Brien.  
 Mailing Address: P.O. Box 16314, Spokane Valley, WA 99216-5314.  
 Res.: 4317 N. Evergreen Rd., WA 99216-1298. Tel: 509-322-4527.  
 Catechesis/Religious Program—Students 10.  
 WALLA WALLA, WALLA WALLA Co., BYZANTINE CATHOLIC MISSION, Closed. For inquiries for parish records contact the Spokane parish.

**On Special Assignment:**

Rev.—  
 Michalena, Alonzi, Chap., Georgetown Law Center, 600 New Jersey Ave., N.W., Washington, DC 20001.

**Retired:**

Revs.—  
 Daigle, Robert E., 6505 O'Bannon Dr., Las Vegas, NV 89146.  
 Gnaill, Julian, 11996 Tivoli Park Bow #3, San Diego, CA 92128. Tel: 619-582-6943.  
 Zupger, Christopher L., 1838 Palomas Dr. N.E., Albuquerque, NM 87110.  
 Very Rev. Archpriest—  
 Moran, Michael, J.C.D., 18761 Algonquin St., #307, Huntington Beach, CA 92649-3135.

**Permanent Deacons:**

Anderson, Craig, Los Gatos, CA  
 Bodnar, Andrew, Denver, CO  
 Bradley, John, San Luis Obispo, CA  
 Casius, Stephen, M.A., Las Vegas, NV  
 Dasevich, James, Phoenix, AZ  
 Escobedo, Brian, 3035 Perrysville Ave., Pittsburgh, PA 15214.  
 Hansha, Michael, Phoenix, AZ  
 Hess, David, P.O. Box 139, Granville, OH 43023.  
 San Diego, CA  
 Mandelak, Michael, 3006 Perrysville Ave., Pittsburgh, PA 15214.  
 Martwick, Gregory, Spokane, WA  
 Montalvo, John, III, Phoenix, AZ  
 Sullivan, Michael, Gilbert, AZ  
 Wargocki, Joseph, Olympia, WA

**INSTITUTIONS LOCATED IN THE DIOCESE**

**[A] RELIGIOUS COMMUNITIES**

PHOENIX, St. Stephen Convent, 5141 N. 16th St., #27, 85020. Tel: 602-944-5121; Fax: 602-951-9796.  
 Sisters Jean Marie Cibola, O.S.B.M.; Christopher Molovsky, O.S.B.M.; Alphonso Danovich, O.S.B.M.

**[B] RETIREMENT HOMES**

PHOENIX, St. Stephen Senior Citizen Apartments, 5141 N. 16th St., 85020. Tel: 602-943-5370; Fax: 602-957-4093. Web: www.ststephenbyzantine.org. Rt. Rev. Stephen G. Washka, Contact Person, Senior Citizens Apartments 26, Residents 28.

**[C] MONASTERIES AND RESIDENCES OF PRIESTS AND BROTHERS**

CALIFORNIA, *Byzantine Brothers of St. Francis, St. Francis Monastery*, 5443 Sharncliffe Rd., CA 92326. Tel: 909-446-8548. Bro. John Gray, B.B.S.F., Supr.

**RELIGIOUS INSTITUTES OF MEN REPRESENTED IN THE DIOCESE**

For further details refer to the corresponding bracketed number in the Religious Institutes of Men or Women section.

§—*Byzantine Brothers of St. Francis*—B.B.S.F.

[1980]—*Congregation of the Resurrection*—C.R.

**RELIGIOUS INSTITUTES OF WOMEN REPRESENTED IN THE DIOCESE**

[3739]—*Sisters of the Order of St. Basil the Great*—O.S.B.M.

**NECROLOGY**

† Szanyi, Edmund M., (Retired)—Died Aug. 3, 2011  
 † Ricella, Joseph, (Retired)—Died Feb. 28, 2011

An asterisk (\*) denotes an organization that has established tax-exempt status directly with the IRS and is not covered by the USCCB Group Ruling.

**Internal Revenue Service  
P.O. Box 2508  
Cincinnati, OH 45201**

**Department of the Treasury**

**Date: June 27, 2012**

**Person to Contact:**

Roger Meyer ID# 0110429

**Toll Free Telephone Number:**

877-829-5500

**Employer Identification Number:**

53-0196617

**Group Exemption Number:**

0928

United States Conference of Catholic  
Bishops  
3211 4<sup>th</sup> Street, NE  
Washington, DC 20017-1194

Dear Sir/Madam:

This responds to your June 26, 2012, request for information regarding the status of your group tax exemption.

Our records indicate that you were issued a determination letter in March 1946, that you are currently exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, and are not a private foundation within the meaning of section 509(a) of the Code because you are described in sections 509(a)(1) and 170(b)(1)(A)(i).

With your request, you provided a copy of the *Official Catholic Directory for 2012*, which includes the names and addresses of the agencies and instrumentalities and the educational, charitable, and religious institutions operated by the Roman Catholic Church in the United States, its territories, and possessions that are subordinate organizations under your group tax exemption. Your request indicated that each subordinate organization is a non-profit organization, that no part of the net earnings thereof inures to the benefit of any individual, and that no substantial part of their activities is for promotion of legislation. You have further represented that none of your subordinate organizations is a private foundation under section 509(a), although all subordinates do not all share the same sub-classification under section 509(a). Based on your representations, the subordinate organizations in the *Official Catholic Directory for 2012* are recognized as exempt under section 501(c)(3) of the Code under GEN 0928.

Donors may deduct contributions to you and your subordinate organizations as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to them or for their use are deductible for federal estate and gifts tax purposes if they meet the applicable provisions of section 2055, 2106, and 2522 of the Code.

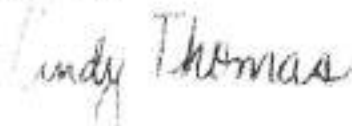
Subordinate organizations under a group exemption do not receive individual exemption letters. Most subordinate organizations are not separately listed in Publication 78 or the EO Business Master File. Donors may verify that a subordinate organization is included

in your group exemption by consulting the *Official Catholic Directory*, the official subordinate listing approved by you, or by contacting you directly. IRS does not verify the inclusion of subordinate organizations under your group exemption. See IRS Publication 4573, *Group Exemption*, for additional information about group exemptions.

Each subordinate organization covered in a group exemption should have its own EIN. Each subordinate organization must use its own EIN, not the EIN of the central organization, in all filings with IRS.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

A handwritten signature in cursive script that reads "Cindy Thomas".

Cindy Thomas  
Manager, Exempt Organizations  
Determinations



## Office of the General Counsel

3111 FOURTH STREET NE • WASHINGTON DC 20017-1194 • 202-541-3300 • FAX 202-541-3337

July 6, 2012

TO: Subordinate Organizations under USCCB Group Ruling  
[GEN: 0928]

SUBJECT: 2012 Group Ruling

FROM: Anthony Picarello, General Counsel  
(Staff: Deirdre Dessingue, Associate General Counsel)

---

This memorandum relates to the Group Ruling reaffirmation letter issued to the United States Conference of Catholic Bishops ("USCCB") on June 27, 2012 by the Internal Revenue Service ("IRS"), with respect to the federal tax status of subordinate organizations listed in the 2012 edition of the Official Catholic Directory ("OCD")<sup>1/</sup>. As explained in greater detail below, this ruling is important for establishing:

- (1) exemption of subordinate organizations under the USCCB Group Ruling from federal income tax; and
- (2) deductibility, for federal income, gift and estate tax purposes, of contributions to such organizations.

The 2012 Group Ruling letter is the latest in a series that began with the original determination letter of March 25, 1946. In the original 1946 letter, the Treasury Department affirmed the exemption from federal income tax of all Catholic institutions listed in the OCD for that year. Each year since 1946, in a separate letter, the 1946 ruling has been reaffirmed with respect to subordinate organizations listed in the current edition of the OCD<sup>2/</sup>. The annual group ruling letter clarifies important tax consequences for Catholic institutions listed in the OCD, and should be retained for ready reference. Group Ruling letters from prior years establish tax consequences with respect to transactions occurring during those years.

<sup>1</sup> A copy of the Group Ruling and this memo may be found on the USCCB website at [www.usccb.org/ogc](http://www.usccb.org/ogc), under the heading Group Tax Exemption.

<sup>2</sup> Catholic organizations with independent IRS exemption determination letters are listed in the 2012 OCD with an asterisk (\*), which indicates that such organizations are **not** covered by the Group Ruling.

**Responsibilities under Group Ruling.** Diocesan officials who compile OCD information for submission to the OCD publisher are responsible for the accuracy of such information. They must ensure that only qualified organizations are listed, that organizations are listed under their correct legal names, that organizations that cease to qualify are deleted promptly, and that newly-qualified organizations are listed as soon as possible.

## **EXPLANATION**

1. **Exemption from Federal Income Tax.** The latest Group Ruling letter reaffirms that the agencies and instrumentalities and educational, charitable, and religious institutions operated, supervised or controlled by or in connection with the Roman Catholic Church in the United States, its territories or possessions that appear in the 2012 OCD and are subordinate organizations under the Group Ruling are recognized as exempt from federal income tax under section 501(c)(3) of the Code. *(The Group Ruling does not cover organizations listed with asterisks or any foreign organizations listed in the 2012 OCD.)*

**Verification of Exemption under Group Ruling.** The latest Group Ruling letter indicates that most subordinate organizations under a group tax exemption are not separately listed in IRS Publication 78 or the IRS Exempt Organization Business Master File ("EOBMF"). As a result, most subordinate organizations under the USCCB Group Ruling will not be included in various online databases that are derived from either of these IRS sources. This does not mean that subordinate organizations included in the Group Ruling are not tax-exempt, that contributions to them are not deductible, or that they are not eligible for grant funding from corporations, private foundations, or other donors that may rely on online databases for verification of tax-exempt status. It does mean that a Group Ruling subordinate may have to make an extra effort to document its eligibility to receive contributions. The Group Ruling letter states that donors may verify that a subordinate organization is included in the Group Ruling by consulting the Official Catholic Directory or by contacting USCCB directly. It also states that IRS does not verify inclusion of subordinate organizations under the Group Ruling. *Accordingly, neither subordinate organizations nor donors should contact IRS seeking verification of inclusion under the Group Ruling.*

Subordinate organizations should refer donors, including corporations and private foundations, to the specific language in the Group Ruling letter noted above, and to IRS Publication 4573, *Group Exemptions*, available on the IRS website at [www.irs.gov](http://www.irs.gov). Publication 4573 explains that: (1) IRS does not

determine which organizations are included in a group exemption; (2) subordinate organizations exempt under a group exemption do not receive an IRS determination letter; (3) exemption under a group ruling is verified by reference to the official subordinate listing (e.g., the Official Catholic Directory); and (4) it is not necessary for an organization included in a group exemption to be listed in Publication 78 or the EOBFM.

2. **Public Charity Status.** The latest Group Ruling letter recognizes that subordinate organizations included in the 2012 OCD are not private foundations under section 509(a) of the Code, and that all subordinate organizations do not share the same sub-classification under section 509(a). In addition, although USCCB is classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(i), that classification does *not* automatically extend to subordinate organizations covered under the Group Ruling.

Verification of Public Charity Status. The latest Group Ruling letter recognizes subordinate organizations covered under its provisions as public charities under section 509(a), but does not specify the subsection of section 509(a) under which they are classified because all covered organizations do not share a common classification. Each subordinate organization must establish its own public charity classification under section 509(a)(1), 509(a)(2) or 509(a)(3) as a condition of inclusion in the Group Ruling.

As a result of requirements imposed by the Pension Protection Act of 2006 with respect to private foundation grants to section 509(a)(3) supporting organizations, private foundations may require more specific documentation of public charity status under section 509(a)(1), 509(a)(2), 509(a)(3)-Type I or 509(a)(3)-Type II.

Certain types of subordinate organizations included in the Group Ruling qualify as public charities by definition under the Code. These are:

- churches and conventions and associations of churches under sections 509(a)(1) and 170(b)(1)(A)(i) [generally limited to dioceses, parishes, religious orders, and state Catholic conferences];
- elementary and secondary schools, colleges and universities under sections 509(a)(1) and 170(b)(1)(A)(ii); and
- hospitals under sections 509(a)(1) and 170(b)(1)(A)(iii).

Other subordinate organizations covered under the Group Ruling may qualify under the public support tests of either sections 509(a)(1) and

170(b)(1)(A)(vi) or section 509(a)(2). Verification of public charity classification under either of the support tests generally can be established by providing a written declaration of the applicable classification signed by an officer of the organization, along with a reasoned written opinion of counsel and a copy of the support test portion of Form 990, if applicable. A section 509(a)(3) organization included in the Group Ruling should be able to rely upon a written declaration of the applicable supporting organization classification signed by an officer of the organization, along with a reasoned written opinion of counsel and Form 990, if applicable, to satisfy foundation grantors of its Type I or Type II supporting organization status.

3. **Deductibility of Contributions.** The latest Group Ruling letter assures donors (including individuals, corporations, and private foundations) that contributions to subordinate organizations listed in the 2012 OCD are deductible for federal income, gift, and estate tax purposes.

4. **Unemployment Tax.** As section 501(c)(3) organizations, subordinate organizations covered by the Group Ruling are exempt from federal unemployment tax. However, individual states may impose unemployment tax on subordinate organizations even though they are exempt from federal unemployment tax. Please refer to your local tax advisor any questions you may have about state unemployment tax.

5. **Social Security Tax.** All section 501(c)(3) organizations, including churches, are required to withhold and pay taxes under the Federal Insurance Contributions Act (FICA) for each employee.<sup>3/</sup> However, services performed by diocesan priests in the exercise of their ministry are not considered "employment" for FICA (Social Security) purposes.<sup>4/</sup> FICA should not be withheld from their salaries. For Social Security purposes, diocesan priests are subject to self-employment tax ("SECA") on their salaries as well as on the value of meals and housing or housing allowances provided to them.<sup>5/</sup> Neither FICA nor income tax withholding is required on remuneration paid directly to religious institutes for members who are subject to vows of poverty and

---

<sup>3</sup> Section 3121(w) of the Code permits certain church-related organizations to make an irrevocable election to avoid payment of FICA taxes, but only if such organizations are opposed for religious reasons to payment of social security taxes.

<sup>4</sup> I.R.C. § 3121(b)(8)(A).

<sup>5</sup> I.R.C. § 1402(a)(8). See also, Compensation of Priests, at <http://www.usccb.org/bishops/dfv/dualtax.htm>.



obedience and are employed by organizations included in the Official Catholic Directory.<sup>6/</sup>

6. **Federal Excise Tax.** Inclusion in the Group Ruling has no effect on a subordinate organization's liability for federal excise taxes. Exemption from these taxes is very limited. Please refer to your local tax advisor any questions you may have about excise taxes.

7. **State/Local Taxes.** Inclusion in the Group Ruling does not automatically establish a subordinate organization's exemption from state or local income, sales or property taxes. Typically, separate exemptions must be obtained from the appropriate state or local tax authorities in order to qualify for any applicable exemptions. Please refer to your local tax advisor any questions you may have about state or local tax exemptions.

8. **Form 990.** All subordinate organizations covered under the Group Ruling must file Form 990, Return of Organization Exempt from Income Tax, *unless* they are eligible for a mandatory or discretionary exception to this filing requirement. ***There is no automatic exemption from the Form 990 filing requirement simply because an organization is included in the Group Ruling or listed in the OCD.*** Subordinate organizations required to file Form 990 must do so by the 15th day of the fifth month after the close of their fiscal year.<sup>7/</sup> Among the organizations not required to file Form 990 under section 6033 of the Code are: (i) churches; (ii) integrated auxiliaries of churches<sup>8/</sup>; (iii)

---

<sup>6</sup> Rev. Rul. 77-290, 1977-2 C.B. 26. See also, OGC/LRCR Memorandum on Compensation of Religions, <http://www.usccb.org/ogc/RelComp2006.pdf> (September 11, 2006).

<sup>7</sup> The penalty for failure to file the Form 990 is \$20 for each day the failure continues, up to a maximum of \$10,000 or 5 percent of the organization's gross receipts, whichever is less. However, organizations with annual gross receipts in excess of \$1 million are subject to penalties of \$100 per day, up to a maximum of \$50,000. I.R.C. § 6652(c)(1)(A).

<sup>8</sup> I.R.C. § 6033(a)(3)(A)(i); Treas. Reg. § 1.6033-2(h). To qualify as an integrated auxiliary of a church, an organization must be described in section 501(c)(3), qualify as other than a private foundation, be affiliated with a church, and qualify as internally supported. An organization will be considered internally supported unless it both:

- (1) Offers admissions, goods, services, or facilities for sale, other than on an incidental basis, to the general public (except goods, services, or facilities sold at a nominal charge or substantially below cost), and
- (2) normally receives more than 50 percent of its support from a combination of governmental sources; public solicitation of contributions (such as through a community fund drive); and receipts from the sale of

the exclusively religious activities of religious orders; (iv) schools below college level affiliated with a church or operated by a religious order;<sup>9</sup> (v) organizations with gross receipts normally not in excess of \$50,000;<sup>10</sup> and (vi) certain church-affiliated organizations that finance, fund or manage church assets, or maintain church retirement insurance programs, and organizations controlled by religious orders that finance, fund or manage assets used for exclusively religious activities.<sup>11</sup>

Special Rules for Section 509(a)(3) Supporting Organizations. The Pension Protection Act of 2006 eliminated discretionary exceptions to the Form 990 filing requirement as applied to section 509(a)(3) supporting organizations. The discretionary exceptions likely to be affected by this provision are exceptions (v) and (vi) above. This means that if a subordinate organization under the Group Ruling is classified as a section 509(a)(3) supporting organization, it may no longer rely on exceptions (v) or (vi) above as the basis for not filing Form 990. However, a section 509(a)(3) supporting organization that qualifies as an integrated auxiliary of a church under section 6033 may continue to rely on that exception as a basis for not filing Form 990. Because it is a statutory exception, the integrated auxiliary of the church exception was not affected by the Pension Protection Act.

Form 990-N Filing Requirements. Under the Pension Protection Act of 2006, a subordinate organization under the Group Ruling that claims exception (v) above (gross receipts normally not in excess of \$50,000) as its sole basis for not filing Form 990 must file annual electronic Form 990-N ("e-postcard") as required by IRS, setting forth the following information: (1) the legal name of the organization; (2) any name under which the organization operates or does business; (3) the organization's mailing address and Internet website address; (4) the organization's EIN; (5) the name and address of a principal officer; (6) evidence of the organization's continued qualification for exemption from the Form 990 filing requirement; and (7) notification of termination, if applicable. Form 990-N must be submitted electronically through the IRS website on or before the 15<sup>th</sup> day of the fifth calendar month following the close of the fiscal year for which it is filed.<sup>12</sup>

---

*admissions, goods, performance of services, or furnishing of facilities in activities that are not unrelated trades or businesses.*

<sup>9</sup> Treas. Reg. §1.6033-2(g)(1)(vii).

<sup>10</sup> Rev. Proc. 2011-15, 2011-3 I.R.B. 322 (January 17, 2011).

<sup>11</sup> Rev. Proc. 96-10, 1996-1 C.B. 577.

<sup>12</sup> Final Regulations: Notification Requirement for Tax-Exempt Entities Not Currently

Public Disclosure and Inspection. Any subordinate organization that is required to file either Form 990 or Form 990-N must upon request make a copy of the form and its schedules and attachments (other than Form 990 contributor lists) available for public inspection during regular business hours at the organization's principal office and at any regional or district offices having three or more employees. Form 990 or Form 990-N for a particular year must be made available for a three year period beginning with the due date of the return.<sup>13/</sup> In addition, any organization that files Form 990 or Form 990-N must comply with written or in-person requests for copies of the form. The organization may impose no fees other than a reasonable fee to cover copying and mailing costs. If requested, copies of the forms for the past three years must be provided. In-person requests must be satisfied on the same day. Written requests must be satisfied within 30 days.<sup>14/</sup>

Public Disclosure of Form 990-T. Under the Pension Protection Act of 2006, Form 990-T, Exempt Organization Unrelated Business Income Tax Return, is subject to the same public inspection and copying rules that apply to Forms 990 and 990-N.

Revocation for Failure to File. Under the Pension Protection Act of 2006, the tax-exempt status of an organization, including a subordinate organization under the Group Ruling, that is required to file either Form 990 or Form 990-N but that fails to do so for three consecutive years will be considered revoked. Reapplication to IRS (not through the Group Ruling process) will be required in order to reinstate exemption. See the IRS website (charities and non-profits) at <http://www.irs.gov/charities/article/0,,id=239696,00.html> for information on automatic revocation, including the current list of revoked organizations and guidance about reinstatement of exemption.

---

*Required to File, 74 Fed. Reg. 36395 (July 23, 2009).*

<sup>13</sup> *The penalty for failure to permit public inspection of the Form 990 is \$20 for each day during which such failure continues, up to a maximum of \$10,000. I.R.C. § 6652(c)(1)(C).*

<sup>14</sup> *I.R.C. § 6104(d). Generally, a copy of an organization's exemption application and supporting documents must also be provided on the same basis. However, since Catholic organizations covered under the Group Ruling did not file exemption applications with IRS, nor did USCCB, organizations covered under the Group Ruling should respond to requests for public inspection and written or in-person requests for copies by providing a copy of the page of the current OCD on which they are listed. If a covered organization does not have a copy of the current OCD, it has two weeks within which to make it available for inspection and to comply with in-person requests for copies. Written requests must be satisfied within the general time limits.*

Group Returns. No subordinate organization under the Group Ruling is authorized to file a group return Form 990 for its own affiliated group of organizations.

9. **Revenue Procedure 75-50.** Rev. Proc. 75-50<sup>15</sup> sets forth notice, publication, and recordkeeping requirements regarding racially nondiscriminatory policies with which private schools, including church-related schools, must comply as a condition of establishing and maintaining exempt status under section 501(c)(3) of the Code. Under Rev. Proc. 75-50 private schools are required to file an annual certification of racial nondiscrimination with the IRS. For private schools not required to file Form 990, the annual certification must be filed on Form 5578, Annual Certification of Racial Nondiscrimination for a Private School Exempt from Federal Income Tax. This form is available at [www.irs.gov](http://www.irs.gov). Form 5578 must be filed by the 15th day of the fifth month following the close of the fiscal year. Form 5578 may be filed by an individual school or by the diocese on behalf of all schools operated under diocesan auspices. The requirements of Rev. Proc. 75-50 remain in effect and must be complied with by all schools listed in the OCD. ***Diocesan or school officials should ensure that the requirements of Rev. Proc. 75-50 are met since failure to do so could jeopardize the tax-exempt status of the school and, in the case of a school not legally separate from the church, the tax-exempt status of the church itself.***

10. **Lobbying Activities.** Subordinate organizations under the Group Ruling may lobby for changes in the law, provided such lobbying is not more than an insubstantial part of their total activities. Attempts to influence legislation both directly and through grassroots lobbying are subject to this restriction. The term "lobbying" includes activities in support of or in opposition to referenda, constitutional amendments, and similar ballot initiatives. There is no distinction between lobbying activity that is related to a subordinate organization's exempt purposes and lobbying that is not. There is no fixed percentage that constitutes a safe harbor for "insubstantial" lobbying. Please refer to your local tax advisor any questions you may have about permissible lobbying activities.

11. **Political Activities.** ***Subordinate organizations under the Group Ruling may not participate or intervene in any political campaign on behalf of or in opposition to any candidate for public office. Violation of the prohibition against political campaign intervention can jeopardize the organization's tax-exempt status.*** In addition to revoking tax-exempt status, IRS may also impose excise taxes on an exempt organization and its

<sup>15</sup> 1975-2 C.B. 587.

managers on account of political expenditures. Where there has been a flagrant violation, IRS has authority to seek an injunction against the exempt organization and immediate assessment of taxes due. The Office of General Counsel memorandum, *Political Campaign Activity Guidance for Catholic Organizations*, available at [www.usccb.org/ogc](http://www.usccb.org/ogc), contains detailed information regarding the prohibition against political campaign intervention. If you have any questions in this regard, please refer them to your local tax advisor.

12. **Group Exemption Number ("GEN")**. The group exemption number assigned to the USCCB Group Ruling is 0928. ***This number must be included on each Form 990, Form 990-T, and Form 5578 required to be filed by a subordinate organization under the Group Ruling.***<sup>16</sup> We advise against using GEN 0928 on Form SS-4, Request for Employer Identification Number, because in the past this has resulted in IRS improperly including USCCB as part of the subordinate organization's name in IRS records.

13. **Employer Identification Numbers ("EINs")**. Each subordinate organization under the Group Ruling should have its own EIN. A subordinate organization must use its own EIN, *not USCCB's EIN*, in all filings with IRS (e.g., Forms 941, W-2, 1099, or 990) and other financial documents. In addition, subordinate organizations may *not* use USCCB's EIN in order to qualify for online donations, grants or matching gifts.

---

<sup>16</sup> IRS has expressed concern about organizations covered under the Group Ruling that fail to include the group exemption number (0928) on their Form 990 filings, particularly the initial filing.

# HOLY PROTECTION OF MARY BYZANTINE CATHOLIC EPARCHY OF PHOENIX

## Chart of Accounts

With the mandated use of *Quick Books Pro* in all parishes and missions as of January 1, 2007, a uniform Chart of Accounts was also mandated for use in the Eparchy. The use of *Quick Books Pro* and this Chart of Accounts becomes the basis for the calculation of the monthly Cathedraticum, annual financial reports and internal audits by the Eparchial Finance Officer. With every parish, mission and outreach using *Quick Books Pro* and this Chart of Accounts should make reports much easier to do and make each entity more accountable.

### Main Categories:

#### Ordinary Income

- Collections
- Authorized Eparchial Collections
- Other Income
- Special Income

#### Ordinary Expenses

- Administrative and General Expenses
- Parish Personnel
- Church Operating Costs
- Rectory Operating costs
- Convent Operating Costs
- Other Building Operating Costs
- Cemetery Operating Costs
- Eparchial Expenses

#### Other Income

- Transfers from Parish Organizations
- Activities/Fund Raising Income

#### Other Expenses

- Activities/Fund Raising Expenses

### Chart of Accounts

1. Review Ordinary Income categories and sub-categories. You may delete any items which will not be used by your parish. Any category additions must be approved by the Eparchy.
2. Review Ordinary Expense categories and sub-categories. You may delete any items which will not be used by your parish. Remodeling, Repairs and Utilities expenses can be recorded either to the individual facility or to General & Administrative Expenses.
3. Review Parish Organizations. Add additional organizations and delete organizations which are not applicable to your parish.
4. Review Activities/Fund Raising income. This section may be customized to your parish. Delete any sub-categories which are not necessary. Add any activities or events which are applicable to your parish.
5. Review activities/Fund Raising Expenses. This section may be customized to your parish. Delete any sub-categories which are not necessary. Add any activities or events which are applicable.
6. It is preferable that the expenses be broken down by building. If that is not possible with your particular situation, then put expenses under General & Administrative. Specify place.
7. General Rule: You may always add a subcategory under the proper categories that are listed below.

## Chart of Accounts & Description

### Assets and Liabilities

<b>1000 – General Accounts</b>	Includes all Parish Checking/Savings
1010 – Primary Checking	
1020 – Secondary Checking	
1100 – Savings #1	
1110 – Savings #2	
1120 – Savings #3	
1200 – Certificate of Deposit #1	
1210 – Certificate of Deposit #2	
<b>1300 – Activities Fund-Raising Accounts</b>	Includes all activity/fund-raising accts.
1310 - Catering	
<b>1500 – Investments</b>	Stocks, Bonds, Mutual funds
<b>2000 – Loan Receivable (Parish)</b>	Optional – includes each loan receivable
<b>3000 – Loan Payable (Parish)</b>	Optional – includes each loan payable

### Ordinary Income

<b>4000 – Collections</b>	
4005- Dividend Income	
4007- Interest Income	
4010- Tithes: Adults	
4015- Tithes: Youth	
4020- Holyday: Christmas	
4025- Holyday: Lent/Pascha	
4030- Holydays: Others	
4030.01- Annunciation	
4030.02- Ascension	
4030.03- Circumcision	
4030.04- Dormition	
4030.05- Palm Sunday	
4030.06- Pentecost	
4030.07- SS. Peter & Paul	
4030.08- St. Nicholas	
4030.09- Thanksgiving	
4030.10- Theophany	
4030.11- Transfiguration	
4045- Initial Offerings	
4050- Improvements/Remodeling	Includes collections for roofs, windows, mosaics, icons, church, appointments, etc.

- 4060- Flowers/Palms
- 4065- Fuel/Energy
- 4070- Candles/votive Lights
- 4090- Other Collections (Specify)

Income from candles and votive lights.  
Collections that support parish activities,  
excludes collections where 100% of collection is  
sent to a charity, mission, etc.

**4100 – Authorized Eparchial Collections**

- 4110- Bishop's Appeal
- 4120- Home Mission
- 4130- Peter's Pence
- 4140- Religious Retirement Fund
- 4150- Authorized Charitable Collections

Exempt from Cathedraticum

**4200 – Other Income**

- 4210- Advertising
- 4220- Bequests, Gifts, Memorials
- 4223- Bishop's Appeal Rebate
- 4225- Donations
- 4230- Dividend/Interest Income
- 4240- ECF/Religious Education
- 4250- Fund Raisers (Specify)
- 4260- Investment Income/Loss
- 4270- Property Rental
- 4275- Property Sales
- 4290- Other Income (Specify)

Parish bulletins

Includes bequests from estates, trusts, gifts, and  
donations received "in memory of ..." etc.

Include unrealized gains/losses

Income not listed under any other categories.

**4300- Special Income**

- 4310- Authorized Building Funds
- 4330- Insurance Reimburse

All exempt from assessment

Insurance proceeds received from damage  
claims

**Ordinary Expenses**

**5000- Administrative & General Expenses**

- 5001- Advertising
- 5002- Advertising: Newspaper
- 5003- Advertising: Telephone
- 5004- Auto/Truck Expense
- 5005- Fuel
- 5006- Insurance
- 5007- License fee
- 5008- Maintenance
- 5009- Other vehicle

Parish owned vehicles only

Priest's personal vehicle included



5010- Bank & Service Charges	
5011- Conferences	Parish only
5012- Clergy Conference	
5013- Clergy Retreat	
5014- Clergy Travel	
5016- Bulletins, Calendars, Envelopes, etc.	
5018- Contributions/Donations	
5019- Eparchial Assessments	
5020- Cathedraicum	
5022- Eparchial Other	
5042- Equipment Purchases	Includes furniture and fixtures not recorded to church, rectory, etc.
5044- Lawn/Grounds Care	
5045- License, Fees & Permits	
5046- Office	
5047- Equipment Purchase	Computers, desks, fax, typewriter, etc.
5048- Postage/Shipping	
5049- Repair & Maintenance	Repairs & contracted services to office equipment
5050- Supplies	
5051- Pest Control	
5052- Petty cash	
5053- Professional Services	Accounting & legal services
5054- Property	
5055- Insurance	
5056- Purchase/Sale Expense	
5057- Taxes	
5058- Publications	
5059- Directory	
5060- Newsletter	
5061- Other	
5062- Remodeling & Improvements	General Not recorded to individual building
5064- Repairs & Maintenance	General Not recorded to individual building
5066- Retreats/Conferences	Includes retreats, conferences, continuing education for the parishioners
5067- Rubbish Collection	

5068- Security	
5069- Snow Removal	
5070- Subscriptions	
5071- Transportation	Bus, van rental
5080- Utilities	
5081- Electricity	Unless recorded to individual building
5084- Gas/Oil	Unless recorded to individual building
5086- Telephone	Unless recorded to individual building
5088- Water & Sewer	Unless recorded to individual building
5099- Other G & A Expenses	
<b>5100- Parish Personnel</b>	
5110- Salaries	
5111- Pastor/Administrator	
5112- Parochial Vicar	
5114- Cantor/Choir director	Only with permission of Bishop
5116- Substitute Clergy	
5120- Custodian	Includes janitor, sexton, church cleaning
5122- Extra Labor	
5126- Secretarial/Bookkeeping	
5128- Sisters	
5130- Clergy Benefits	
5132- Medical Insurance	
5134- Pension Plan	
5135- Sisters/Laity Benefits	
5137- Medical Insurance	
5139- Pension Plan	
5156- Payroll taxes	Includes both clergy & lay payroll taxes
5160- Clergy Subsistence	
<b>5200- Church Operating Costs</b>	
5210- Candles/Votive Lights	Cost of candles and votive lights
5230- ECF/Religious Education	Including tuition, subsidies, materials, supplies, training, evangelization, etc.
5242- Equipment Purchases	Includes furniture and fixtures
5250- Flowers/Decorations	

5262- Remodeling & Improvements	
5263- Rent Expense	
5264- Repairs & Maintenance	
5265- Sanctuary Supplies	Chrism, charcoal, incense, wine
5275- <i>New Construction</i>	
5280- Utilities	
5282- Electricity	Except if listed under general
5284- Gas/Oil	Except if listed under general
5286- Telephone	Except if listed under general
5288- Water & Sewer	Except if listed under general
5290- Vestment Purchase & Upkeep	
5295- Worship Expense	Includes books/printing for worship, cantor supplies, etc.
5299- Other Church Expenses	
<b>5300- Rectory Operating Costs</b>	
5310- Cable/Satellite TV Exp.	
5342- Equipment Purchases	Includes furniture and fixtures
5350- Housekeeping Expense	
5362- Remodeling & Improvements	
5364- Repairs & Maintenance	
5380- Utilities	
5382- Electricity	Except if listed under general
5384- Gas/Oil	Except if listed under general
5386- Telephone	Except if listed under general
5388- Water & Sewer	Except if listed under general
5299- Other Rectory Expenses	
<b>5400- Convent Operating Costs</b>	
5442- Equipment Purchases	Includes furniture and fixtures
5462- Remodeling & Improvements	
5464- Repairs & Maintenance	

5480- Utilities	
5482- Electricity	Except is listed under general
5484- Gas/Oil	Except if listed under general
5486- Telephone	Except if listed under general
5488- Water & Sewer	Except if listed under general
5499- Other Convent Expenses	
<b>5500- Other Building Operating Costs</b>	Includes hall, storage facilities, garages, etc
5542- Equipment Purchases	Includes furniture and fixtures
5550- Outside Labor	
5552- Personnel	
5554- Salaries	
5556- Payroll Taxes	
5562- Remodeling & Improvements	
5564- Repairs & Maintenance	
5580- Utilities	
5582- Electricity	Except if listed under general
5584- Gas/Oil	Except if listed under general
5586- Telephone	Except if listed under general
5588- Water & Sewer	Except if listed under general
5599- Other Building Expenses	Expenses that don't fit above categories (specify)
<b>5600- Cemetery Operating Costs</b>	Includes expense which are paid from the general accounts only
<b>5800- Eparchial Expenses</b>	
5820- Bishop's Appeal	
5840- Home Mission	
5860- Peter's Pence	
5580- Religious Retirement Fund	
<b>5900- Loans Repayment</b>	
5910- Interest Expense	Use this category to record the interest portion of your loan payment

## Other Income

### **6100- Parish Organizations**

- 6110- Altar Society
- 6120- Ladies Guild
- 6130- Men's Club
- 6140- Youth Group

These categories may be customized to your parish needs. Use this category for transfer of funds.

### **6200- Activities Income**

- 6210- Catering
- 6220- Hall Income
- 6230- Fund-Raising Event Income
- 6250- Gift Shop Income
- 6260- Parish Socials Income
- 6280- Other Activities Income

These categories may be customized to your parish needs

Revenue from bakery, pirohi, kielbasa,  
Revenue from hall events  
Revenue from raffles, dances, etc.  
Includes sale of religious goods  
Includes dinners, picnics, socials, etc.

## Other Expenses

### **7100- Parish Organizations**

- 7110- Altar Society
- 7120- Ladies Guild
- 7130- Men's Club
- 7140- Youth Group

### **7200- Activities Expense**

- 7210- Catering Expense
- 7220- Hall Expense
- 7230- Fund-Raising Expense
- 7250- Gift Shop Expense
- 7260- Parish Socials Expense
- 7280- Other Activities Expense

These categories may be customized to your parish needs

Expenses related to bakery, pirohi, and kielbasa  
Expenses directly related to hall events  
Expenses related to raffles, dances, etc.  
Cost of religious goods for re-sale  
Expense related to dinners, picnics, socials, etc.

**8000 – Outreach Income**

Outreach is when a new faith community is being formed from the “mother” parish.

**8100 – Collections**

- 8110- Tithes: Adults
- 8115- Tithes: Youth
- 8120- Holyday: Christmas
- 8125- Holyday: Lent/Pascha
- 8130- Holydays: Others
- 8145- Initial Offerings
- 8150- Improvements/Remodeling
- 8160- Flowers/Palms
- 8165- Fuel/Energy
- 8170- Candles/Votive Lights
- 8190- Other Collections (Specify)

**8200- Authorized Eparchial Collections**

- 8210- Bishop's Appeal
- 8220- Home Mission
- 8230- Peter's Pence
- 8240- Religious Retirement Fund
- 8250- Authorized Charitable Collections

**8300 – Other Income**

- 8310- Advertising
- 8320- Bequests, Gifts, Memorials
- 8323- Bishop's Appeal Rebate
- 8325- Donations
- 8330- Dividend/Interest Income
- 8340-ECF/Religious Education
- 8350- Fund Raisers (Specify)
- 8360- Investment Income/Loss
- 8370- Property Rental
- 8375- Property Sales
- 8390- Other Income (Specify)

**8400-Special Income**

- 8410- Authorized Building Funds
- 8430- Insurance Reimbursement

**9000 – Outreach Expenses**

Expenses of this new faith comm.

- 9001- Advertising
  - 9001.1- Advertising: Newspaper
  - 9001.2- Advertising: Telephone
- 9004- Auto expenses
  - 9004.1- Fuel
  - 9004.2- Insurance
  - 9004.3- License fee
  - 9004.4- Maintenance

9010- Bank & Service Charges

9011- Conferences

9012- Clergy Conference

9013- Clergy Retreat

9014- Clergy Travel

9016- Bulletins, Calendars, envelopes, etc.

9017- Eparchial assessments

9018- Contributions/ Donations

9042- Equipment Purchases

9044- Lawn/Grounds Care

9045- License, fees & permits

9046- Office

9047- Equipment Purchase

9048- Postage/ Shipping

9049- Repair & Maintenance

9050- Supplies

9051- Pest Control

9052- Petty Cash

9053- Professional Services

9054- Property

9055- Insurance

9056- Purchase/Sale Expense

9057- Taxes

9058- Publications

9059- Directory

9060- Newsletter

9061- Other

9062- Remodeling & Improvements

9064- Repairs & Maintenance

9066- Retreats/Conferences

9067- Rubbish Collections

9068- Security

9069- Snow Removal

9070- Subscriptions

9071- Transportation

9080- Utilities

9081- Electricity

9084- Gas/Oil

9086- Telephone

9088- Water & Sewer

9099- Other Expenses

## **9100- Outreach Personnel**

### **9110- Salaries**

- 9111- Pastor/ Administrator
- 9114- Cantor
- 9116- Substitute Clergy
- 9120- Custodian
- 9122- Extra Labor
- 9126- Secretarial/ Bookkeeping

### **9130- Clergy Benefits**

- 9132- Medical Insurance
- 9134- Pension Plan

### **9156- Payroll Taxes**

### **9160- Clergy Subsistence**

Some priests requested more space for other Holydays because they wanted to itemize them. If you need more spaces under a particular category, you may use a **decimal point** with that number as was done with Holydays: Other. Just be sure you make it a subcategory.

## **FINANCE MEMO**

**Parish Expenses**      **All parish expenses are to be paid from the general fund accounts.**

**Activities Expenses**      **Expenses paid from the activities accounts such as Catering or Hall must be directly attributed to an activity/fund-raising event. The parish expenses, such as custodians, utilities, improvements, etc. are to be paid from the general fund accounts.**

Funds received from parish organizations are recorded as transfers under the 6100's category of Other Income.

If you are paying someone more than \$200 a year, you will need to do a W-2 form for them.

If someone makes a donation of \$250 or more a donation letter needs to be sent to the donor when the donation is received. See the sample of a donation letter.





## HOLY PROTECTION OF MARY BYZANTINE CATHOLIC EPARCHY OF PHOENIX

Pastoral Center - 8105 North 16th Street - Phoenix, AZ 85020  
Phone: (602) 861-9778 - FAX (602) 861-9796  
[www.eparchy-of-van-nuys.org](http://www.eparchy-of-van-nuys.org)

### SAFE ENVIRONMENT FORMATION CHARTER

*WE PLEDGE TO PROTECT OUR MOST VALUABLE RESOURCE: OUR CHILDREN*

June 1, 2011

*Glory to Jesus Christ!  
Glory forever!*

Dear Faithful of the Eparchy of Phoenix,

Since the 2002 Bishop's meeting in Dallas, the Eparchy of Phoenix has implemented a program that provides a safe environment for minors and vulnerable adults within our parishes. The current policies are compliant with the *United States Conference of Catholic Bishops'* annual audit. The main documents are included in this special revised edition and are posted on the eparchial web site.

We have held workshops for all eparchial clergy, consecrated religious, employees, religious education teachers and students. All parents, interested adults, and catechists in the Eparchy have attended workshops. Sister Jean Marie Cihota, OSBM is the Safe Environment coordinator. The Catechists in turn will give presentations appropriate to each age group. In this way, all will have a clear understanding of our safe environment program. We hope and pray that this will prevent any future problems. If any allegations of sexual abuse against minors are discovered, they will be resolved and guided by the direction of all relevant laws of both Church and state in a prayerful and Christian way.

Yours in Christ,

*+ Gerald N. Dino*

Most Reverend Gerald N. Dino  
*Bishop of the Eparchy of Phoenix*

## TABLE OF CONTENTS

Policy and Procedures Concerning Sexual Abuse of Minors.....	3
Prevention and Education.....	4
Code of Pastoral Conduct.....	8
Volunteer's Code of Conduct.....	15
Procedures for Filing a Complaint of Sexual Abuse of Minors.....	17
Eparchial Misconduct Review Board.....	19
Appendix I. Glossary.....	23
Appendix II. Guidelines for Maintaining a Safe Environment for Minors.....	25
Appendix III. Guidelines for Digital Communications.....	30
Appendix IV. Parish Annual Safe Environment Forms	
• Parish Contact Person for Safe Environment.....	33
• Consent Form for Background Check.....	34
• Safe Environment Formation for Parish/Eparchial Employees, Parents and/or Volunteers.....	35
• Questionnaire Follow-up to Formation.....	36
• Safe Environment Formation for Minors.....	37
• Parent Opt-out Form.....	38

# POLICY AND PROCEDURES CONCERNING SEXUAL ABUSE OF MINORS BY CLERGY OR CHURCH PERSONNEL OF THE BYZANTINE CATHOLIC EPARCHY OF PHOENIX

## Preface

On June 14, 2002, the United States conference of Catholic Bishops approved a *Charter for the Protection of Children and Young People*. The charter addresses the church's commitment to deal appropriately and effectively with cases of sexual abuse of minors by priests, deacons, and other church personnel. The bishops of the United States have promised to reach out to those who have been sexually abused as minors by anyone serving the Church in ministry, employment, or a volunteer position, whether the sexual abuse was recent or occurred many years ago. They stated that they would be as open as possible with the people in parishes and communities regarding instances of sexual abuse of minors, with respect always for the privacy and the reputation of the individuals involved. They have committed themselves to the pastoral and spiritual care and emotional well-being of those who have been sexually abused and of their families.

To ensure that each diocese/eparchy in the United States of America will have procedures in place to respond promptly to all allegations of sexual abuse of minors, the United States Conference of Catholic Bishops requires that each diocese/eparchy have a written policy on the sexual abuse of minors by priests and deacons, as well as by other church personnel which is in full compliance with the *Essential Norms for Diocesan/Eparchial Policies Dealing with Allegations of Sexual Abuse of Minors by Priests or Deacons*. The Eparchial Policy is to specify, in detail, the steps to be taken in implementing the requirements of canon law, particularly CCEC, Canons 1468-1470. Each diocese/eparchy will designate a competent person to coordinate assistance for the immediate pastoral care of persons who claim to have been sexually assaulted when they were minors by priests, deacons or any eparchial personnel, while in the work of the Eparchy. (*USCCB Essential Norms for Allegations of Sexual Abuse of Minors*, Norm 2)

In addition to establishing a written policy on the sexual abuse of a minor, there is to be the establishment of a Eparchial Review Board. The board, required by the *Eparchial Charter on the Clergy Misconduct Review Board*, has already been established as the Eparchial Misconduct Review Board Regarding Sexual Abuse of Minors. This Board is an independent advisory board that makes recommendations directly to the Bishop concerning cases in which clerics are accused of sexual misconduct and in other matters relating to the Eparchial Policy on Sexual Misconduct by Clergy. As defined in Canon law, a "cleric" is a priest, deacon or bishop. The Board will consider all cases of sexual misconduct by clergy. There is to be no screening or filtering process.

## PREVENTION AND EDUCATION

The Byzantine Catholic Eparchy of Phoenix is committed to providing a safe environment wherein every person, as created in the image and likeness of God is honored. Preventative measures are necessary to cultivate a culture of prevention and safety especially for minors. These preventative measures include:

- a) the screening all clergy, catechists, volunteers and paid personnel of the Eparchy
- b) providing education and information concerning safety protocols and practices
- c) recognizing the signs of abuse in minors
- d) effectively responding to any signs of abuse or indication of abuse

All priests, deacons, minor clerics, seminarians, vowed religious, catechists, volunteers in supervisory capacities, youth directors and paid personnel of the Eparchy, having regular contact with minors, whether current or prospective are required to:

- a) sign a consent form for the purpose of undergoing a background check
- b) read and follow this ***Policy and Procedures Concerning the Sexual Abuse of Minors***
- c) attend the safe environment formation sessions, preferably annually

In addition all catechists and/or volunteers must complete the safe environment questionnaire (Appendix IV) and return to their Pastor or Parish Safe Environment Coordinator.

Prior to the canonical presentation of any non-eparchial cleric for service in the Eparchy, in addition to a letter of recommendation from his eparchial bishop or religious superior, there must be a clear disclosure of any knowledge relating to actual or alleged physical or sexual abuse. Furthermore, there is a moral obligation of the cleric's own eparchial bishop or religious superior to provide to the Eparchy all new information of actual or alleged physical or sexual misconduct.

Completed questionnaires shall be reviewed and as appropriate, investigated by the eparchial safe environment coordinator. These questionnaires shall be maintained in the personnel files of the Eparchy, with access limited to those individuals who have actual custody and control over the personnel files in accord with canon 257.

## POLICY TO BE FOLLOWED WHEN THE EPARCHY RECEIVES AN ALLEGATION

It is the policy of the Eparchy of Phoenix that reports of inappropriate behavior or sexual abuse of a minor by a priest, deacon or any eparchial personnel, while in the work of the Eparchy, will be carefully investigated by the Bishop or his delegate. The requirements of local civil law will be observed. The eparchial bishop will provide for the pastoral care of the victim(s). He may seek the advice of the Eparchial Clergy Misconduct Review Board. He will issue a decree initiating the Preliminary Investigation to determine if the allegation constitutes at least the semblance of truth about an offence. He is to inquire carefully about the facts and circumstances surrounding the offence. He approves the

canonical counsel for the accused cleric or any Church personnel. He reports to the civil authorities if required by law when the person involved is a minor and notifies civil counsel and insurer.

The person(s) making the allegations will be interviewed in an atmosphere that will insure justice and fairness to all concerned. The accused will also be interviewed. Confidentiality will be maintained, and only those necessary will be involved in the process. The policy does not address sexual misconduct in general, but only in the special circumstances described herein. It is intended to establish requirements and procedures in an effort to prevent sexual misconduct by personnel of the Eparchy involving minors and the resulting harm to others while the work of the Eparchy is being performed. Furthermore, it is intended to provide guidance to the personnel of the Eparchy on how to respond to allegations of sexual misconduct if such does occur.

## **OBLIGATION TO REPORT**

Any individual adult of the Eparchy who has actual knowledge of any or who has reasonable cause to suspect an incident of sexual misconduct, as defined in this policy, by any personnel of the Eparchy, shall comply with any applicable reporting or other requirements of State and local laws (unless to do so would violate the priest-penitent relationship of the Mystery of Reconciliation), and shall report to the Eparchy as follows:

A verbal report of the incident shall be made immediately to the pastor of the parish and a written report shall be prepared (See page 18). In the event this report cannot be made to the pastor, then it shall be made to the proto-presbyter of the area or the syncellus.

## **NOTIFICATIONS**

Notifications shall immediately be made to the eparchial bishop, safe environment eparchial coordinator and legal counsel to the Eparchy. The pastor or the head of the institution where the incident is alleged to have taken place is responsible for making this notification.

## **INVESTIGATION OF REPORTS**

Investigation shall be made in accordance with canon law and shall be conducted by a person properly qualified for this type of investigation. The investigation shall be conducted with care taken not to interfere with any criminal investigation, and with a high level of Christian care, concern and confidentiality for the alleged victim, the family of the alleged victim, the person reporting the incident, and the alleged perpetrator. Care is to be taken that any investigation does not call into question any person's good name.

## INVESTIGATION OF NON-CLERGY PERSONNEL

For accusations against all non-clergy personnel, a preliminary investigation shall be conducted by a person designated by the eparchial bishop and the results shall be immediately made known to the eparchial coordinator and legal counsel for the Eparchy. In such a case it is deemed to be in the best interest of the Eparchy or the alleged victim or perpetrator, and in the sole judgment of the eparchial bishop, that the alleged perpetrator be relieved of all responsibilities to the Eparchy and placed on administrative leave pending the outcome of any internal or external investigation. The eparchial bishop will determine if the leave is to be with or without pay. The accused shall be instructed to retain his or her own legal counsel. Any non-clergy personnel who admits to, does not contest, or is found guilty of sexual misconduct shall be immediately terminated from any employment or position within the Eparchy or parish.

## INVESTIGATION OF CLERGY

Investigations shall be made in accordance with canon law and shall be conducted promptly. If possible, the cleric shall be interviewed by a person designated by the eparchial bishop. Precautionary measures, in accord with canon law, shall be taken to assure that the alleged perpetrator not be a risk to minors.

When allegations are admitted by a priest or deacon and it is deemed appropriate by the Bishop, taking into consideration the demands of justice and the good of all involved the accused:

- a) Will have his assignment terminated. Activities involving contact with parishioners, minors, and other persons are to be forbidden except as is necessary under appropriate safeguards.
- b) May be *requested* to seek and urged to *voluntarily* comply with an appropriate medical and psychological evaluation. (*Essential Norms*, Norm 7)
- c) Will be removed permanently from ecclesiastical ministry, not excluding dismissal from the clerical state, if the case so warrants when even a single act of sexual abuse is admitted or is established after an appropriate process in accord with canon law. (*Essential Norms*, Norm 8, CCEC, c.1453)
- d) Notification of the incident shall be given to insurers in accordance with the terms of applicable policies. If there is admission to the allegation, legal counsel becomes the responsibility of the person accused.
- e) When allegations are made of sexual misconduct involving eparchial or parish personnel, contact with the alleged victim and family should be

promptly initiated by the eparchial bishop or person(s) designated by him for the purpose of pastoral care, having first obtained legal counsel. No comment is to be made as to the truth of any accusation.

- f) Any media contact or inquiries regarding any incident of sexual misconduct by personnel of the Eparchy must be directed by the director of communications in consultation with legal counsel.

When allegations are denied by the priest/deacon, the accused is to be informed of the investigation which the Bishop is bound to conduct in accord with the prescriptions of Canons 1468-1470. At the same time the priest/deacon is to be informed of his right to canonical advice, as well as his right to a trial conducted in accordance with Canons 1104, 2, 1185 ff. The priest/deacon also shall be reminded of his right to counsel from a civil and/or criminal attorney. If the accused remains firm in his denial of the allegations presented, the Bishop will conduct an investigation in accord with the procedure outlined in Canons 1468-1470, unless the accused chooses to have a canonical trial.

## **ANONYMOUS ACCUSATIONS**

No accusations should be made anonymously, since anonymous accusations do not allow for proper investigation.

## **FALSE ACCUSATIONS**

Civil, criminal and canon law each provide penalties for falsehood in which individuals become victims of false denunciation, perjury and slander. The Eparchy and the falsely accused retain the right to pursue such civil and canonical penalties against all those involved in false accusations.

## **REVIEW**

This policy shall be reviewed periodically by the Review Board of the Eparchy.

*Revised: June 1, 2011, by the Eparchy of Phoenix*

# CODE OF PASTORAL CONDUCT

For Priests, Deacons, Pastoral Ministers, Administrators, Employees and Volunteers

## PREFACE

This *Model Code of Pastoral Conduct for Priests, Deacons, Pastoral Ministers, Administrators, Employees and Volunteers* is intended for use as a risk management tool by bishops, pastors, superiors of religious communities/institutes, and administrators. The purpose of the *Code of Pastoral Conduct* is to assist in developing and implementing uniform guidelines for appropriate behavior in situations of pastoral counseling and spiritual direction. The *Code of Pastoral Conduct* is not intended to address all situations that may arise in pastoral counseling relationships. It is intended to create a structure for addressing a variety of circumstances that, if not appropriately addressed, may create a risk of incidents, allegations, claims and/or lawsuits.

The Church must be exemplary. Clergy, staff, and volunteers should and will be held accountable for their behavior. In order to maintain the highest level of accountability, there must be a clear and unambiguous blueprint of appropriate and inappropriate behavior. The *Code of Pastoral Conduct* provides a basic structure for identifying limits. It is intended as a "continuous improvement document." Therefore, your suggestions and recommendations for additions and revisions are encouraged.

## I. PREAMBLE

Priests, deacons, pastoral ministers, administrators, staff, and volunteers in our parishes, religious communities/institutes, and organizations must uphold Christian values and conduct. The *Model Code of Pastoral Conduct for Priests, Deacons, Pastoral Ministers, Administrators, and Volunteers (Code of Pastoral Conduct)* provides a set of standards for conduct in certain pastoral situations.

## II. RESPONSIBILITY

The public and private conduct of clergy, staff, and volunteers can inspire and motivate people, but it can also scandalize and undermine the people's faith. Clergy, staff, and volunteers must, at all times, be aware of the responsibilities that accompany their work. They must also know that God's goodness and grace supports them in their ministry.

Responsibility for adherence to the *Code of Pastoral Conduct* rests with the individual. Clergy, staff, and volunteers who disregard this *Code of Pastoral Conduct* will be subject to remedial action by the Eparchy of Phoenix. Corrective action may take various forms—from a verbal reproach to removal from the ministry—depending on the specific nature and circumstances of the offense and the extent of the harm.



### III. PASTORAL STANDARDS

#### 1. Conduct for Pastoral Counselors and Spiritual Directors\*

\* Pastoral Counselors and Spiritual Directors: Clergy, staff, and volunteers who provide pastoral, spiritual and/or therapeutic counseling services to individuals, families, or other groups.

*Pastoral Counselors and Spiritual Directors must respect the rights and advance the welfare of each person.*

1.1 Pastoral Counselors and Spiritual Directors shall not step beyond their competence in counseling situations and shall refer clients to other professionals when appropriate.

1.2 Pastoral Counselors and Spiritual Directors should carefully consider the possible consequences before entering into a counseling relationship with someone with whom they have a pre-existing relationship (i.e., employee, professional colleague, friend, or other pre-existing relationship). [See Section 7.2.2]

1.3 Pastoral Counselors and Spiritual Directors should not audiotape or videotape sessions.

1.4 Pastoral Counselors and Spiritual Directors must never engage in sexual intimacies with the persons they counsel. This includes consensual and nonconsensual contact, forced physical contact, and inappropriate sexual comments.

1.5 Pastoral Counselors and Spiritual Directors shall not engage in sexual intimacies with individuals who are close to the client—such as relatives or friends of the client—when there is a risk of exploitation or potential harm to the client. Pastoral Counselors and Spiritual Directors should presume that the potential for exploitation or harm exists in such intimate relationships.

1.6 Pastoral Counselors and Spiritual Directors assume the full burden of responsibility for establishing and maintaining clear, appropriate boundaries in all counseling and counseling related relationships.

1.7 Physical contact of any kind (i.e., touching, hugging, holding) between Pastoral Counselors or Spiritual Directors and the persons they counsel can be misconstrued and should be avoided.

1.8 Sessions should be conducted in appropriate settings at appropriate times.

1.8.1 No sessions should be conducted in private living quarters.

1.8.2 Sessions should not be held at places or times that would tend to cause confusion about the nature of the relationship for the person being counseled.

1.9 Pastoral Counselors and Spiritual Directors shall maintain a log of the times and places of sessions with each person being counseled.

## 2. Confidentiality

***Information disclosed to a Pastoral Counselor or Spiritual Director during the course of counseling, advising, or spiritual direction shall be held in the strictest confidence possible.***

2.1 Information obtained in the course of sessions shall be confidential, except for compelling professional reasons or as required by law.

2.1.1 If there is clear and imminent danger to the client or to others, the Pastoral Counselor or Spiritual Director may disclose only the information necessary to protect the parties affected and to prevent harm.

2.1.2 Before disclosure is made, if feasible, the Pastoral Counselor or Spiritual Director should inform the person being counseled about the disclosure and the potential consequences.

2.2 Pastoral Counselors and Spiritual Directors should discuss the nature of confidentiality and its limitations with each person in counseling.

2.3 Pastoral Counselors and Spiritual Directors should keep minimal records of the content of sessions.

2.4 Knowledge that arises from professional contact may be used in teaching, writing, homilies, or other public presentations only when effective measures are taken to absolutely safeguard both the individual's identity and the confidentiality of the disclosures. It is suggested that a priest or deacon does not make any references in the Parish in which the counselee is a member.

2.5 While counseling a minor, if a Pastoral Counselor or Spiritual Director discovers that there is a serious threat to the welfare of the minor and that communication of confidential information to a parent or legal guardian is essential to the child's health and well-being, the Counselor or Spiritual Director should:

- a) Attempt to secure written consent from the minor for the specific disclosure.
- b) If consent is not given, disclose only the information necessary to protect the health and well-being of the minor.
- c) Consultation with the appropriate Church supervisory personnel is required before disclosure.

2.6 These obligations are independent of the confidentiality of the confessional. Under no circumstances whatsoever can there be any disclosure—even indirect disclosure—of information received through the confessional.

### **3. Conduct with Teenagers**

***Clergy, staff, and volunteers working with teens shall maintain an open and trustworthy relationship between youth and adult supervisors.***

3.1 Clergy, staff, and volunteers must be aware of their own and others' vulnerability when working alone with youth. Use a team approach to managing youth activities.

3.2 Physical contact with youth can be misconstrued and should occur  
(a) only when completely nonsexual and otherwise appropriate,  
(b) never in private.

3.3 Clergy, staff, and volunteers should refrain from the illegal possession and/or illegal use of drugs and/or alcohol at all times when working with youth. (Refer to Appendix II.)

3.4 Clergy should not allow individual young people to stay overnight in the cleric's private accommodations or residence.

3.5 Staff and volunteers should not provide shared, private, overnight accommodations for individual young people including, but not limited to, accommodations in any Church owned facility, private residence, hotel room, or any other place where there is no other adult supervision present. (Refer to Appendix II.)

3.5.6 In rare, emergency situations, when accommodation is necessary for the health and well-being of the youth, the clergy, staff, or volunteer should take extra-ordinary care to protect all parties from the appearance of impropriety and from all risk of harm.

3.5.7 Use a team approach to managing emergency situations.

### **4. Sexual Conduct**

**Clergy, staff, and volunteers must not, for sexual gain or intimacy, exploit the trust placed in them by the faith community.**

4.1 Clergy, religious, staff, and volunteers who are committed to a celibate lifestyle are called to be an example of celibate chastity in all relationships at all times.

4.2 Staff and volunteers who provide pastoral counseling or spiritual direction services must avoid developing inappropriate intimate relationships with minors, other staff, or parishioners. Staff and volunteers must behave in a professional manner at all times.

4.3 No clergy, staff, or volunteer may exploit another person for sexual purposes.

4.4 Allegations of sexual misconduct should be taken seriously and reported to the Pastoral Center of the Eparchy of Phoenix and to civil authorities if the situation involves a minor. Eparchy of Phoenix procedures will be followed to protect the rights of all involved.

4.5 Clergy, staff, and volunteers should review and know the contents of the child abuse regulations and reporting requirements for the state or local authorities and should follow those mandates.

## **5. Harassment**

***Clergy, staff, and volunteers must not engage in physical, psychological, written, or verbal harassment of staff, volunteers, or parishioners and must not tolerate such harassment by other Church staff or volunteers.***

5.1 Clergy, staff, and volunteers shall provide a professional work environment that is free from physical, psychological, written, or verbal intimidation or harassment.

5.2 Harassment encompasses a broad range of psychological, physical, written, or verbal behavior, including without limitation the following:

- Physical or mental abuse
- Racial insults
- Derogatory ethnic slurs
- Unwelcome sexual advances or touching
- Sexual comments or sexual jokes
- Display of offensive materials
- Requests for sexual favors used as:
  - a condition of employment, or
  - to affect other personnel decisions, such as promotion or compensation

5.3 Harassment can be a single severe incident or a persistent pattern of behavior where the purpose or the effect is to create a hostile, offensive, or intimidating work environment.

5.4 Allegations of harassment should be taken seriously and reported immediately to the Pastoral Center of the Eparchy of Phoenix. The Eparchy of Phoenix procedures will be followed to protect the rights of all involved.

## **6. Parish, Religious Community/Institute, and Organizational Records and Information**

***Confidentiality will be maintained in creating, storing, accessing, transferring, and disposing of parish, religious community/institute, or organizational records.***

6.1 Sacramental records shall be regarded as confidential. When compiling and publishing parish, religious community/institute or organization statistical information from these records, great care must be taken to preserve the anonymity of individuals.

6.2 Most sacramental records older than 70 years are open to the public.

6.2.1 Information regarding adoption and legitimacy remains confidential, regardless of age.

6.2.2 Only staff members who are authorized to access the records and supervise their use shall handle requests for more recent records.

6.3 Parish, religious community/institute, or organization financial records are confidential unless review is required by the Eparchy of Phoenix or an appropriate government agency. Contact the Pastoral Center upon receipt of any request for release of financial records.

6.4 Individual contribution records of the parish, religious community/institute, or organization shall be regarded as private and shall be maintained in strictest confidence.

## **7. Conflicts of Interest**

***Clergy, staff, and volunteers should avoid situations that might present a conflict of interest. Even the appearance of a conflict of interest can call integrity and professional conduct into question.***

7.1 Clergy, staff, and volunteers should disclose all relevant factors that potentially could create a conflict of interest.

7.2 Clergy, staff, and volunteers should inform all parties when a real or potential conflict of interest arises. Resolution of the issues must protect the person receiving ministerial services.

7.2.1 No clergy, staff, or volunteer should take advantage of anyone to whom they are providing services in order to further their personal, religious, political, or business interests.

7.2.2 Pastoral counselors should not provide counseling services to anyone with whom they have a business, professional, or social relationship. When this is unavoidable, the client must be protected. The counselor must establish and maintain clear, appropriate boundaries.

7.2.3 When pastoral counseling or spiritual direction services are provided to two or more people who have a relationship with each other, the Pastoral Counselor or Spiritual Director must:

- Clarify with all parties the nature of each relationship,
- Anticipate any conflict of interest,
- Take appropriate actions to eliminate the conflict,
- Obtain from all parties written consent to continue services.

7.3 Conflicts of interest may also arise when a Pastoral Counselor's or Spiritual Director's independent judgment is impaired by:

- Prior dealings,
- Becoming personally involved, or
- Becoming an advocate for one (person) against another.

In these circumstances, the Pastoral Counselor or Spiritual Director shall advise the parties that he or she can no longer provide services and refer them to another Pastoral Counselor or Spiritual Director.

## **8. Reporting Ethical or Professional Misconduct**

*Clergy, staff, and volunteers have a duty to report their own ethical or professional misconduct and the misconduct of others.*

8.1 Clergy, staff, and volunteers must hold each other accountable for maintaining the highest ethical and professional standards. When there is an indication of illegal actions by clergy, staff, or volunteers, you should notify the proper civil authorities immediately. Also notify the Pastoral Center in Phoenix, Arizona.

8.2 When an uncertainty exists about whether a situation or course of conduct violates this *Code of Pastoral Conduct* or other religious, moral, or ethical principles, consult with peers, others knowledgeable about ethical issues or Pastoral Center of the Eparchy of Phoenix.

8.3 When it appears that a member of clergy, a staff member, or a volunteer has violated this *Code of Pastoral Conduct* or other religious, moral, or ethical principles, report the issue to a supervisor or next higher authority, or refer the matter directly to the Pastoral Center of the Eparchy of Phoenix.

8.4 The obligation of Pastoral Counselors and Spiritual Directors to report client misconduct is subject to the duty of confidentiality. However, any agreement or duty to maintain confidentiality must yield to the need to report misconduct that threatens the safety, health, or well-being of any of the persons involved except as provided for in Section 2.6.

## **9. Administration**

*Employers and supervisors shall treat clergy, staff, and volunteers justly in the day-to-day administrative operations of their ministries.*

9.1 Personnel and other administrative decisions made by clergy, staff, and volunteers shall meet civil and canon law obligations and also reflect Catholic social teachings and this *Code of Pastoral Conduct*.

9.2 No clergy, staff, or volunteer shall use his or her position to exercise unreasonable or inappropriate power and authority.

9.3 Each volunteer providing services to children and youth must read and sign the *Code of Conduct* before providing services.

## 10. Staff or Volunteer Well-being

***Clergy, staff, and volunteers have the duty to be responsible for their own spiritual, physical, mental, and emotional health.***

10.1 Clergy, staff, and volunteers should be aware of warning signs that indicate potential problems with their own spiritual, physical, mental, and/or emotional health.

10.2 Clergy, staff, and volunteers should seek help immediately whenever they notice behavioral or emotional warning signs in their own professional and/or personal lives.

10.3 Clergy, staff, and volunteers must address their own spiritual needs. Support from a Spiritual Director is highly recommended.

10.4 Inappropriate or illegal use of alcohol and drugs is prohibited.

## IV. VOLUNTEER'S CODE OF CONDUCT

***Our minors are the most important gifts God has entrusted to us. As a volunteer, I promise to strictly follow the rules and guidelines in this Volunteer's Code of Conduct as a condition of my providing services to the minors of our Eparchy of Phoenix. (Refer to Appendix III to verify with signatures)***

### **As a volunteer, I will:**

- Treat everyone with respect, loyalty, patience, integrity, courtesy, dignity, and consideration.
- Avoid situations where I am alone with children and/or youth at Church activities.
- Use positive reinforcement rather than criticism, competition, or comparison when working with children and/or youth.
- Refuse to accept expensive gifts from children and/or youth or their parents without prior written approval from the pastor or administrator.
- Refrain from giving expensive gifts to children and/or youth without prior written approval from the parents or guardian and the pastor or administrator.
- Report suspected abuse to the pastor, administrator, or appropriate supervisor and the Eparchy of Phoenix Pastoral Center.
- I understand that failure to report suspected abuse to civil authorities is, according to the law, a crime in most jurisdictions.
- Cooperate fully in any investigation of abuse of children and/or youth.

### **As a volunteer, I will not:**

- Smoke or use tobacco products in the presence of children and/or youth.
- Use, possess, or be under the influence of alcohol at any time while volunteering.
- Use, possess, or be under the influence of illegal drugs at any time.

- Pose any health risk to children and/or youth (i.e., no fevers or other contagious situations).
- Strike, spank, shake, or slap children and/or youth.
- Humiliate, ridicule, threaten, or degrade children and/or youth.
- Touch a child and/or youth in a sexual or other inappropriate manner.
- Use any discipline that frightens or humiliates children and/or youth.
- Use profanity in the presence of children and/or youth.

I understand that as a volunteer working with children and/or youth, I may be subject to a thorough background check including criminal history. I understand that any action inconsistent with this *Code of Conduct* or failure to take action mandated by this *Code of Conduct* may result in my removal as a volunteer with children and/or youth.



## **PROCEDURES for FILING A COMPLAINT OF SEXUAL ABUSE OF MINORS**

1. All clergy, staff, and volunteers must report knowledge or belief that a minor is the victim of sexual abuse. (See *Eparchy of Phoenix Pastoral Code of Conduct*, Section III, 8)
2. All complaints or knowledge of abuse should first be brought to the attention of the pastor of the parish, the principal of the school, the head of a religious community, or the supervisor of the particular ministry or organization.
3. If a victim or a victim's family is making a direct complaint on their own they will meet with the pastor of the parish, the principal of the school, the superior of the religious community, or the supervisor in charge of the activity. At all times, a victim or complainant, may report directly to the Bishop.
4. The person hearing the complaint will take note of the victim's name and address, the person they are accusing, the place where the incident occurred, the time that the incident took place, and a general description of the nature of the offense.
5. Upon receiving the preliminary information noted above, it is mandated that the pastor, principal, religious superior, or ministry supervisor forward the report of abuse to:
  - a) the Bishop & Protosyncellus of the Eparchy;
  - b) the local police department for your town (911) and
  - c) the Child Protection Agency or Hot Line for your area if required.
6. The Bishop and Protosyncellus, upon receipt of a complaint, will contact the Victim's Assistance Coordinator, the Eparchial Review Board, the Syncellus, the Eparchial attorney, and the Eparchial insurance company. They will also verify that the report has been filed with the local police and the appropriate Child Protection Agency if required.
7. The Bishop or representative will personally meet with all victims and their families.
8. The Bishop will begin a preliminary internal investigation of the incident in accordance with canons 1468-1470 of the Code of Canons of the Eastern Churches.
9. If there is credible evidence that sexual abuse has occurred, appropriate measures will be taken to remove the offender from ministry and place him/her on administrative leave in accordance with the provisions of canon 1473 of the Code of Canons of the Eastern Churches.

**Eparchy of Phoenix**  
8105 N 16<sup>th</sup> Street  
Phoenix AZ 85020  
(602)861-9778 Telephone  
(602)861-9796 FAX  
[jean.sister@cox.net](mailto:jean.sister@cox.net)

**Victim's Assistance Coordinator**  
Rosemarie Ludwig, Ph.D  
PO Box 83474  
Phoenix AZ 85071  
(602) 997-1550 Telephone  
[rstussy@cox.net](mailto:rstussy@cox.net)

**UNIFORM REPORT FOR CHILD PROTECTION**  
**Eparchy of Phoenix**

Date of report: \_\_\_\_\_ Reported: \_\_\_\_\_

Telephone: \_\_\_\_\_

CHILD: \_\_\_\_\_ DOB: \_\_\_\_\_ Male \_\_\_\_ Female \_\_\_\_

Parent/Guardian: Telephone: \_\_\_\_\_

Address:

\_\_\_\_\_

Suspected perpetrator: \_\_\_\_\_ Relationship to child: \_\_\_\_\_

**Public Children's Service Agency to whom report was made:**

- \_\_\_ Alaska Child Abuse Hotline (1-800-478-4444)
- \_\_\_ Arizona Child Abuse Hotline (1-888-767-2445)
- \_\_\_ Phoenix (602-530-1800 24 hrs.)
- \_\_\_ California (1-800-422-4453)
- \_\_\_ Colorado (303-866-3006)
- \_\_\_ Idaho (1-800-422-4453)
- \_\_\_ Nevada (1-800-992-5757)
- \_\_\_ New Mexico (1-800-797-3260)
- \_\_\_ Oregon (1-800-854-3508)
- \_\_\_ Washington (1-800-562-5624)
- \_\_\_ Bureau of Indian Affairs (1-800-633-5155)

\_\_\_ **National Child Abuse Hotline (1-800-422-4453)**

\_\_\_ **Other** \_\_\_\_\_

Was report made to law enforcement? \_\_\_yes \_\_\_no

To whom was the report made?

\_\_\_\_\_

Reason for report:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## **EPARCHIAL MISCONDUCT REVIEW BOARD**

### **Regarding Sexual Abuse of Minors**

#### **The Board**

The name of the board required by the *Eparchial Policy on Sexual Abuse by Clergy and Eparchial Personnel* will be the **Eparchial Misconduct Review Board**. For purposes of brevity, it will be referred to as "The Board" in the following paragraphs. The Board is an independent advisory board that makes recommendations directly to the Eparchial Bishop concerning cases in which clerics or eparchial personnel are accused of sexual misconduct and in other matters relating to the *Eparchial Policy on Sexual Misconduct by Clergy or Eparchial Personnel*. As defined in Canon Law, a "cleric" is a priest, deacon or bishop. The Board will consider all cases of sexual misconduct by clergy or eparchial personnel. There is to be no screening or filtering process. The cases presented to the Board will not be limited to behavior with minors.

#### **Board Membership**

The Board will be comprised of five members appointed by the Eparchial Bishop. The Board will include lay Catholics with expertise in a variety of areas and who are not employees of the Eparchy. An effort will be made to have the Board membership reflect the racial, ethnic, and social diversity of the Eparchy. The existence and purpose of the Board and the identity of Board members will be made public. The Board and its members will be listed in the Eparchial Pastoral Handbook. As outlined in the *Eparchial Policy on Sexual Abuse by Clergy or Eparchial Personnel*, members will be appointed for a term of five years or until a successor is appointed. Initial terms will be staggered. Members can be appointed for more than one term. There should be a reasonable turnover in membership in order to provide the Board with new perspectives and expertise.

The Eparchial Bishop will designate a Chairperson to serve for a one-year term. The term may be renewed for one but not more than two additional terms. Board members will not receive compensation for their services, but will be reimbursed for their necessary expenses. Past and present Board members will be covered by sufficient insurance to protect them from any liability that could arise from the performance of their duties.

The Eparchial Promoter of Justice will be asked to attend the meetings and to provide information to the Board but is not a member of the Board.

#### **Executive Secretary**

The Eparchial Bishop will appoint an Executive Secretary who will attend all meetings but is not a member of the Board. The Secretary is to assist the Board in the performance of its duties. This person is to be a well-qualified and experienced Catholic professional who possesses the expertise necessary to serve in this capacity and is responsible to the Board under the direction of the Chairperson.

## Functions of the Board

- A. The Board will review regularly, at least annually, the Eparchial policies on sexual misconduct and make recommendations for strengthening and enhancing the effectiveness of these policies in preventing and dealing with sexual misconduct.
  
- B. The Board will consider all complaints of sexual misconduct by clergy which occur within the pastoral boundaries of the Eparchy of Phoenix or which involve clerics assigned to or working or living within the Eparchy. This includes cases involving Eparchial clerics, clerics from elsewhere who are on assignment in the Eparchy, religious order clerics who are serving in the Eparchy, and clerics who have been granted hospitality or permission to assist in the Eparchy on a temporary basis.
  1. The Board will receive a written report, prepared by Executive Secretary, of each and every allegation of sexual misconduct lodged against a cleric. The Board will not normally receive or consider complaints involving allegations of sexual misconduct by someone other than a cleric.
  2. In order to properly carry out the functions of the Board, the Chairperson and Executive Secretary will have full access to all information about the case.
  3. The Board will verify that the Eparchy has fulfilled its commitment to report the complaint to the appropriate civil authorities.
  4. The Board will discuss each allegation, the background of the parties involved, the response of the cleric, the actions taken by the Eparchial Promoter of Justice and all other relevant information. It will have the authority and resources to obtain additional information deemed to be necessary.
  5. The Board will recommend whether it is necessary to place the accused cleric on administrative leave if that has not already been done.
  6. The Board will receive reports about the pastoral outreach extended to victims and other recommendations about further efforts to assist victims.
  7. The Board will consider whether the parish staff or parish community has been or should be advised of the cleric's misconduct.
  8. The Board will monitor each case and once sufficient information has been obtained, make a formal report to the Eparchial Bishop concerning its findings and recommendations, including whether canonical steps should be taken to remove a cleric permanently from ministry. This assessment should be made in the context of the Eparchial policy that a cleric will not be knowingly assigned to serve in the parishes, schools, pastoral ministries or any other assignment when it has been determined that he has engaged in the sexual abuse of a minor.
  9. If it appears there is a likelihood that the cleric can be restored to ministry, the Board will make recommendations as to the steps that would be necessary for this to happen and recommend a program of on-going support and supervision for the cleric.

10. The Board will periodically review the cases of clerics who have not been permanently removed from ministry. In this respect, the Board will be provided with status reports containing information obtained from the cleric's supervisor and any other helpful information, including results of psychological evaluations and treatment programs.
- C. The Eparchial Bishop will seek the advice of the Board whenever he receives indications that a cleric or church personnel may be involved in any kind of sexual misconduct.

### **Meetings**

The Chairperson will ordinarily convene and preside at meetings. The Board will conduct its business at meetings held as often as necessary to perform its duties. The Chairperson may call special meetings when exceptional circumstances are presented which require immediate attention. Meetings will ordinarily be in person; however, special meetings can be conducted telephonically.

Three Board members constitute a quorum and the concurrence of not less than three members is necessary to make a recommendation to the Eparchial Bishop.

The Eparchial Bishop will be invited to attend all meetings. The Board may invite others to attend all or some part of a meeting if necessary.

The meetings will be consultative and advisory, not adversarial and adjudicative. The meetings are not hearings but rather sessions at which the Board receives and considers information, deliberates and formulates its recommendations.

The Board proceedings are confidential and the members of the Board will not discuss the business of the Board or the information presented to the Board with persons who are not Board members or staff.

The Chair of the Board and the Promoter of Justice will communicate to the Eparchial Bishop the matters considered by and the recommendations of the Board shortly after each meeting.

### **Confidentiality of Records**

All records relating to the work of the Board are confidential. Access to these records is restricted to the Eparchial Bishop and his delegates and to those persons or agencies within the Eparchy who need to obtain the information to carry out the purposes of the Eparchial Policy on Sexual Misconduct by Clergy.

### **Review of Board Guidelines**

The Board will formally review the above Charter and the work of the Board after one year and, at least, annually thereafter and make any recommendations to the Eparchial Bishop for whatever changes it deems appropriate.

**EPARCHY OF PHOENIX REVIEW BOARD**

**His Grace, Most Reverend Gerald N. Dino**  
8105 North 16th Street  
Phoenix, AZ 85020  
(602) 861-9778 (602) 861-9796 FAX

**REVIEW BOARD MEMBERS APPOINTED BY BISHOP GERALD DINO  
on May 1, 2009**

**CHAIRPERSON**

**Deacon Michael J. Sullivan**  
1020 E. Bishop Circle  
Tempe, AZ 85282

**Dr. Regina Brown**  
22341 Destell  
Mission Viejo, CA  
92691

**Irene Groot**  
6323 Paso Los Cerritos  
San Jose, CA  
95120

**Patrick Cullen**  
7 W. Calle Montilla  
Rancho Sahuarita, AZ  
85627

**Jennifer King Mikitish**  
Office of Safe Environment Training  
400 E. Monroe Street  
Phoenix, AZ 85004-2336

**SAFE ENVIRONMENT COORDINATOR**

**Sister Jean Marie Cihota, OSBM**  
8105 N. 16th Street  
Phoenix, AZ 85020  
(602) 861-9778  
Email: jean.sister@cox.net

**VICTIM'S ASSISTANCE COORDINATOR**

**Rosemarie Ludwig, Ph. D**  
PO Box 83474  
Phoenix, AZ 85071  
(602) 997-1550 (602) 678-0235 FAX  
Email: rstussy@cox.net

## APPENDIX I. GLOSSARY

**Advocate/Victim Assistance Coordinator:** a person appointed by the Eparchial Bishop who actively assists and supports a victim of sexual abuse that involves clergy or church personnel. This coordinator seeks through a ministerial process to empower the victim to reclaim her/his own voice that the church may once again be a place of sanctuary.

**Allegation:** statement(s) given in writing that a minor has been sexually abused by any Church personnel.

**Auditor:** person appointed through USCCB (United States Conference of Catholic Bishops) to examine the data collection from the Parishes of the Eparchy of Phoenix, and files including all background checks.

**Background checks:** through the signing of a consent form, all clergy and church personnel must be screened through the Lexis Nexis Company. This Company checks the backgrounds through the use of the Social Security Number for state sexual offenders and national criminal offenders.

**Canon or Canon Law:** refers to the Code of Canons of the Eastern Churches (CCEC).

**Charter:** document created by the USCCB, *Charter for the Protection of Children and Young People*.

**Child Protective Services (CPS):** name of the governmental agency in many states of the United States that respond to reports of child abuse or neglect. This agency may use other names for such a service.

**Church Personnel:** any priest, deacon, religious, seminarian, catechists, employee or any person from the Eparchy or parish that has regular contact with minors.

**Director of Communications:** principal spokesperson for the Eparchy and official liaison with the media.

**Harassment:** verbal or physical behavior that denigrates another person and creates a hostile, offensive or intimidating environment.

**Minors:** persons who have yet to obtain their 18th birthday.

**Perpetrator:** a term commonly used by law enforcement officers to designate who actually commits a crime.

**Policy:** document for the Eparchy of Phoenix, *Policy and Procedures Concerning Sexual Abuse of Minors by clergy or church Personnel.*

**Protosyncellus:** a priest appointed by the eparchial bishop to assist him in governing the eparchy.

**Review Board:** an independent advisory committee appointed by the eparchial bishop that makes recommendations to him concerning cases of sexual misconduct of clergy and/or church personnel.

**Safe Environment Coordinator:** person appointed by the eparchial bishop to coordinate the implementation of the *Charter for the Protection of Children and Young People.*

**Sexually Abused:** a statutory offence that states that it is a crime to knowingly cause another person to engage in an unwanted sexual act by force or threat. Any sexual activity that is deemed improper or harmful, as between an adult and minor or with a person of diminished mental capacity.

**Sexual Misconduct:** Any sexual conduct of eparchial personnel while performing the work of the Eparchy involving children or minors (cfr. Canon 909, p.3), which is contrary to the moral instructions, doctrines and canon law of the Catholic church and which causes injury to another as recognized by canon law or the civil or criminal laws of the State where a parish may be located or where the alleged offense occurred.

**Victim:** one who is harmed by or made to suffer from an act, circumstance, agency or condition; one who is tricked, swindled or taken advantage.

**Vulnerable Adults:** is understood as one who habitually lacks the full use of reason, is not responsible for his/herself and is equated with a minor.



## APPENDIX II.

### GUIDELINES FOR MAINTAINING A SAFE ENVIRONMENT FOR MINORS DURING EPARCHIAL /PARISH PROGRAMS

1. **Pre-approval from the Pastor** or appropriate leadership is needed for the validity of the event.
2. **Background Checks** – All persons over the age of 18 working with the program require background checks. The necessary applications for background checks for those of the Eparchy of Phoenix can be obtained from the Pastor and submitted to the Safe Environment Office at the Pastoral Center.
3. **Safe Environment Training** – All adults working with youth must have proof of having completed Safe Environment training on file at the Pastoral Center.
4. **Required Forms** – All pertinent and required forms must be completed, i.e., Pastoral Conduct Form for adults; permission and health forms for youth.
5. **Instructions/Procedures for a Specific Event** –in preparation for a program, participants and chaperones/staff must be informed about behavioral expectations.
6. **Adult Leaders and Chaperones** –There must be at least two adult leaders (21 years of age or older) to provide sufficient leadership for all parish sponsored activities. Ratio of adult to minor should be no less than 1 adult per 6 minors.
7. **One-on-One Contact** – When working with youth, it is important that the leaders of the group do not meet one-on-one (privately) with a young person (as per policy). In the rare situations that require personal conferences, the meeting is to be conducted in view of other adults and youths.
8. **Transportation** – When youth are being transported in vehicle, two unrelated adults must be present. An adult leader or chaperone should never be alone in a vehicle with a minor.
9. **Constructive Discipline** – Discipline used in youth ministry, educational and catechetical ministry should be constructive and reflect the Church's values. Corporal punishment is never permitted.
10. **Appropriate Attire** – Proper clothing for activities is required. Modest tops or T-shirts with acceptable wording and logos are allowed. Torn, ripped, or clothes with holes are not acceptable, neither are oversized clothes. Modest dress is always required. Example: No tank tops, halter tops, transparent blouses, very short or tight shorts or skirts, etc. The discretion of the adult supervisor will be respected.

11. **No Secret Organizations** – The Church does not recognize any secret organizations as part of its programs. All aspects of the youth program are open to observations by the Bishop, pastors, parents and leaders.
12. **Hazing** – Physical hazing and initiations are prohibited and may not be included as part of any activity. Adult leaders must monitor and guide the leadership techniques used by youth leaders.
13. **Alcohol and Smoking** – Youth and adults participating in the program are prohibited from the use of alcohol, smoking, any illegal drugs or the improper use of legal drugs.
14. **Supervisory Structure for Sleeping Arrangements and Bathroom Facilities** – To insure safety, specific requirements must be in place 24 hours a day.
  - Adults (18 and older) must have separate sleeping accommodations from the youth.
  - Two chaperones, one male another female, contingent on group (if not gender specific), must be arranged to ensure adult supervision throughout the night.
  - In the case of limited bathroom facilities, appropriate arrangements must be made for youth and adult to use the facilities independently.

**PASTORAL CONDUCT FORM FOR ADULTS WORKING WITH YOUTH IN  
PARISH/EPARCHIAL PROGRAMS**

I will:

- treat everyone with respect, loyalty, patience, integrity, courtesy, dignity, and consideration.
- refrain from using foul language and foul gestures at all times.
- refrain from smoking, using tobacco products, any illegal drugs or improper use of legal drugs at any time while serving children or youth in parish/archieparchial functions.
- refrain from using, possessing, or being under the influence of alcohol or illegal drugs at any time while serving children or youth in parish/eparchial functions.
- report any suspected abuse and neglect to the person in authority who will notify the Pastoral Center's Safe Environment Office and/or local child protection agency or civil authorities.
- cooperate fully in any investigation of abuse of children or youth.

I understand that failure to report suspected abuse to civil authorities is, according to the law, a Class B misdemeanor. The only exceptions to this requirement involve information learned only within the Mystery of Reconciliation or within an attorney-client privilege.

I understand that any action inconsistent with the above may result in termination of my giving services to children or youth.

I certify with my signature below that I have read the Sexual Misconduct Policy of the Eparchy of Phoenix and the Guide to the Policy.

Adult's Printed Name \_\_\_\_\_

Adult's Signature \_\_\_\_\_

Parish \_\_\_\_\_ Date \_\_\_\_\_

Signature of Pastor (as Witness) \_\_\_\_\_

## EXPECTATIONS OF CHAPERONES/STAFF DURING YOUTH PROGRAMS

### (Tailored to the event)

- To protect both the participants and staff alike and to insure safety for all, avoid any one-on-one situations with a teen.
- Likewise to insure a Safe Environment, all participants must be present at all activities for the duration of the event. Moreover, coming and going, or partial participation disturbs the dynamic process and continuity of the Youth Event on personal and communal spirit.
- In order to keep the integrity of the event, all public announcements will be assigned to a specific person.
- Direct any potential problems to the Event Leader or staff member.
- All medical issues are to be directed to the Event Leader or First Aid attendant.
- Curfews and quiet times are applicable for everyone, especially the adults, who are models for the event.
- In emergency situations, direct those specific teens in your care to the designated area, do a head count. If all are not present inform the event leader and/or staff.
- No adults, other than the leaders and/or facilitators are to be present during the talks and reflection times. Any additional adult presence unfairly inhibits the teens' openness and participation.
- As Christian models, respect for all participants is expected. Edifying speech and behavior are necessary components in Christian models. (No yelling or talking down to teens is ever acceptable.)
- Adult leaders are not called to "police" or control participants, but rather are to guide and lead teens by emulating the love, teachings, sacrifice and service of Jesus Christ.

**Expectations for Youth during the Program  
(Tailored to the event)**

- May not leave the premises of the event
- Must observe the curfew and quiet at night in the sleeping areas
- No electronic devices
- No Public or Private Display of Affection
- No smoking, use of drugs or alcohol
- No foul language or foul gestures
- Modest clothing appropriate to the activity
- Give the highest respect and dignity to everyone
- Maintain cleanliness of facilities and property
- All equipment returned and placed in its proper location

**In case of a general emergency immediately gather in the designated meeting area.**

## APPENDIX III.

### EPARCHIAL GUIDELINES FOR DIGITAL COMMUNICATIONS

#### **Guiding Principles (adapted from the USCCB Social Media Guidelines June 2010)**

The world of digital communication, with its almost limitless expressive capacity, makes us appreciate all the more Saint Paul's exclamation: "*Woe to me if I do not preach the Gospel*" (1 Cor 9:16) – Pope Benedict XVI, 2010 World Communication Day message. Social media is the fastest growing form of communication in the United States, especially among youth and young adults. Our Church cannot ignore it, but at the same time we must engage social media in a manner that is safe, responsible and civil.

#### **Eparchy of Phoenix Guidelines**

##### **I. Introduction**

These guidelines are intended to guide and enable appropriate use of digital media. Adherence to boundary issues as posed in the Policy and Procedures of Eparchy of Phoenix are applicable, whether face-to-face or via the digital media.

The following are the **minimal** guidelines to protect Church Personnel, youth and children. Leadership may expand upon these guidelines.

##### **II. Legal Aspects of Digital Communication**

1. Use of computers and internet connectivity should be consistent with the mission of the Church. In the use of computers, equipment and other related resources, church personnel must respect the privacy of other users, respect copyright and license agreements, protect data from unauthorized use or disclosure, and safeguard their accounts and passwords.
2. Church equipment is the property of the Eparchy, therefore must be used only for professional communications. Church personnel must not use computers for any illegal or immoral purpose. They must not transmit threatening, obscene or harassing materials or correspondence.
3. Church personnel must not engage in unauthorized distribution of data and information. They must refrain from revealing or publicizing proprietary or confidential information.
4. Church personnel must not communicate or advocate religious beliefs or practices contrary to the Catholic Church's teaching. Users must refrain from inappropriately representing opinions as those of the Eparchy of Phoenix, their Parish, or any of their official sub-entities.

5. Church personnel may not use the computers for private advertizing of products or services, or for any activity meant to foster personal gain. They must refrain from uploading or downloading commercial software in violation of its copyright.

### **III. Guidelines for Eparchial / Parish Communication**

All Eparchial or Parish digital communications must involve clear visibility, accountability, and responsibility at all times. These are not appropriate mechanisms for confidentiality and should never involve secrecy.

1. For a Parish Social network site, permission of the Pastor must be given prior to establishing a social networking site.
  - A separate Parish account is to be established; do not use a personal account for a social network site. There must be absolutely no "unofficial," "unauthorized," or "personal" Parish sites of any kind that use the Parish name, logo, parish information, parish membership network, or recognition either in fact (de facto) or in law (de juris).
  - There should be at least two site administrators (preferably more) appointed by the pastor for each site, to allow rapid response and continuous monitoring of the site.
  - Passwords and names of sites must be registered with the Pastor as well as in a central location and more than one adult should have access to this information.
  - All Parish social networking, blogs, chat rooms, instant messaging, texting, and web sites must be moderated at all times. No one may post anything to the public via these sites except with the review and approval of an official Parish site administrator for each message each time.
  - All Parish moderators/site administrators will receive instruction and guidelines from their Pastor, who is ultimately responsible, or his designee(s). All subsequent questions not covered clearly by their pastoral instruction and guidelines will be referred back to the Pastor or his designee(s) for additional guidelines and instruction.
  - All users of Parish social networking must be approved in advance by the Pastor or his designee(s).
  - The Pastor will be informed of and keep record of all Parish social networking site users, as well as all guidance and instruction given to Parish social networking site administrators.

- Conversations are to be brief and in line with the Policy and Procedures of the Eparchy.
  - All Parish social networking site users except ordained clergy and professed religious shall only write in the first person and never claim to represent the official position of the Parish, Eparchy, or the Catholic Church unless specifically authorized by the Pastor. Ordained clergy and professed religious will consult with and receive authorization from the Pastor before posting official positions on Parish social networking sites.
  - It is highly recommended to save copies of the correspondence with minors or vulnerable adults to avoid any negative implications. Chat or instant messaging should be discouraged.
2. All list serve or "blast" text messages etc. to all parishioners must originate with or be approved in advance by the Pastor.
  3. Written permission must be received from parents/guardians if there are photo/video of minors or vulnerable adults in any newsletter, website, blog, brochures or other promotional materials, etc. For the safety of the individual, use only the first name and set a reasonable length of time in the use of photo/video.

In addition, parents/guardians must have access to everything provided by Parish social networking to their minor children or vulnerable adults, including the opportunity to be copied on all such communications to or from their minor children or vulnerable adults. Parental access and copies may be by means of parallel technology that is more accessible to them.

Parish social networking moderators/site administrators and all users should not communicate privately with minor children or vulnerable adults. All such communications must be public and open to both the parents/guardians and the Pastor.

4. It is acceptable to use photos/videos in which people are unidentifiable, such as group photos. Permission or release forms are not necessary.



**APPENDIX IV.  
PARISH ANNUAL FORMS**

**Contact Person for Parish Safe Environment Program for the Audit Year**

\_\_\_\_\_   
 year contact person (please print)

Parish: \_\_\_\_\_

Pastor: \_\_\_\_\_

**Address of Contact Person:**

\_\_\_\_\_   
 Street City State Zip

Phone of Contact Person: \_\_\_\_\_

Email of Contact Person: \_\_\_\_\_

*Revised 6/1/2011*

**BYZANTINE CATHOLIC EPARCHY OF PHOENIX**  
Pastoral Center - 8105 North 16th Street - Phoenix, AZ 85020  
Phone: (602) 861-9778 Fax: (602) 861-9796

*Consumer Authorization*

*Mail completed form to: Sr. Jean Marie Cihota, OSBM, 8105 N. 16<sup>th</sup> Street, Phoenix, AZ 85020*

**CONSENT FORM FOR BACKGROUND CHECK**

I, \_\_\_\_\_, hereby authorize the Eparchy of Phoenix and/or its agents to make an independent investigation of my background, references, character, past employment, education, criminal or police records, including those maintained by both public and private organizations and all public records for the purpose of confirming the information contained on my Application and/or obtaining other information which may be material to my qualifications for employment now and, if applicable, during the tenure of my employment with the Eparchy of Van Nuys.

I release the Eparchy of Phoenix and/or its agents and any person or entity, which provides information pursuant to this authorization, from any and all liabilities, claims or lawsuits in regards to the information obtained from any and all of the above referenced sources used.

The following is my true and complete legal name and all information is true and correct to the best of my knowledge:

\_\_\_\_\_  
*Full Name (Printed)*

\_\_\_\_\_  
*Maiden Name or Other Names Used*

\_\_\_\_\_  
*Present Address - How Long?*

\_\_\_\_\_  
*City/State/Country/Zip*

\_\_\_\_\_  
*Phone*

\_\_\_\_\_  
*Former Address - How Long?*

\_\_\_\_\_  
*Date of Birth*

\_\_\_\_\_  
*Parish*

\_\_\_\_\_  
*Social Security Number*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

*Note: The above information is required for identification purposes only, and is in no manner used as qualifications for employment. The Eparchy of Phoenix is an Equal Opportunity Employer; and does not discriminate on the basis of Sex, Race, Religion, Age (40 and over), Handicap, or National Origin.*

*Rev. 6/1/2011*

I have also read the *Eparchy of Phoenix Code of Pastoral Conduct*. I have retained the copy of this document for my records, and I agree to follow it.

\_\_\_\_\_  
*Signature*

**2. Safe Environment Formation Program for Parish/Eparchial Employees, Parents and/or Volunteers**

Parish: \_\_\_\_\_

Pastor: \_\_\_\_\_

Program Facilitator: \_\_\_\_\_

Name of the Program Offered: \_\_\_\_\_

Date of the Program Offered: \_\_\_\_\_

**Signatures of Attendees of the Program:**

*Print*

*Signature*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### 3. Safe Environment Questionnaire Follow-up to Formation

Volunteers, as a follow-up to your Safe Environment Formation, please complete this questionnaire on creating a safe environment. Return this questionnaire to your Pastor or Parish Safe Environment Coordinator.

1. As a volunteer, do you fully understand the eparchy's policy and code of conduct and the church's role in creating a safe environment? If not, what do you need clarified?

2. Are you aware of your responsibilities in reporting misconduct?

3. Do you know the process for reporting misconduct?

4. If you are a Catechist, are you using the lesson plans provided for the teaching of Safe Environment Formation?

5. How are you supported in your parish in creating a safe environment?

Name \_\_\_\_\_ Date \_\_\_\_\_

Parish \_\_\_\_\_ City \_\_\_\_\_

Rev. 6/1/2011

**4. Safe Environment Formation for Minors of the Parish**

Parish: \_\_\_\_\_ Pastor: \_\_\_\_\_

Date of the Formation for Minors: \_\_\_\_\_

NAME OF THE CATECHIST	GRADE LEVEL	NO. OF MINORS
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total Number of Minors Attending Safe Environment Formation Classes: \_\_\_\_\_

Signature of Pastor or Parish Safe Environment Coordinator:

\_\_\_\_\_ Date: \_\_\_\_\_

### 5. Parent Safe Environment Formation Program Opt-out Form

We, the undersigned are aware that in accord with the Charter for the Protection of Children and Young People, mandate that each Parish are to offer Safe Environment Formation for employees and volunteers, and in an age appropriate manner, to the minors of the Parish.

As parents we acknowledge our role as the primary educators of our children. We have opted this year to instruct our children in these matters in a manner that we determine as necessary and appropriate to protect our minors from crimes of sexual harrassment and molestation.

Materials from our Parish through the Eparchy of Phoenix concerning the principles of Safe Environment were offered to and received by us.

Parent Name: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

*Names of Minors instructed by parents and/or guardians:*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Please return this form to your Pastor or to the Safe Environment Coordinator of your Parish.*

## APPENDIX I. GLOSSARY

**Advocate/Victim Assistance Coordinator:** a person appointed by the Eparchial Bishop who actively assists and supports a victim of sexual abuse that involves clergy or church personnel. This coordinator seeks through a ministerial process to empower the victim to reclaim her/his own voice that the church may once again be a place of sanctuary.

**Allegation:** statement(s) given in writing that a minor has been sexually abused by any Church personnel.

**Auditor:** person appointed through USCCB (United States Conference of Catholic Bishops) to examine the data collection from the Parishes of the Eparchy of Phoenix, and files including all background checks.

**Background checks:** through the signing of a consent form, all clergy and church personnel must be screened through the Lexis Nexis Company. This Company checks the backgrounds through the use of the Social Security Number for state sexual offenders and national criminal offenders.

**Canon or Canon Law:** refers to the Code of Canons of the Eastern Churches (CCEC).

**Charter:** document created by the USCCB, *Charter for the Protection of Children and Young People*.

**Child Protective Services (CPS):** name of the governmental agency in many states of the United States that respond to reports of child abuse or neglect. This agency may use other names for such a service.

**Church Personnel:** any priest, deacon, religious, seminarian, catechists, employee or any person from the Eparchy or parish that has regular contact with minors.

**Director of Communications:** principal spokesperson for the Eparchy and official liaison with the media.

**Harassment:** verbal or physical behavior that denigrates another person and creates a hostile, offensive or intimidating environment.

**Minors:** persons who have yet to obtain their 18th birthday.

**Perpetrator:** a term commonly used by law enforcement officers to designate who actually commits a crime.

**Policy:** document for the Eparchy of Phoenix, *Policy and Procedures Concerning Sexual Abuse of Minors by clergy or church Personnel.*

**Protosyncellus:** a priest appointed by the eparchial bishop to assist him in governing the eparchy.

**Review Board:** an independent advisory committee appointed by the eparchial bishop that makes recommendations to him concerning cases of sexual misconduct of clergy and/or church personnel.

**Safe Environment Coordinator:** person appointed by the eparchial bishop to coordinate the implementation of the *Charter for the Protection of Children and Young People.*

**Sexually Abused:** a statutory offence that states that it is a crime to knowingly cause another person to engage in an unwanted sexual act by force or threat. Any sexual activity that is deemed improper or harmful, as between an adult and minor or with a person of diminished mental capacity.

**Sexual Misconduct:** Any sexual conduct of eparchial personnel while performing the work of the Eparchy involving children or minors (cfr. Canon 909, p.3), which is contrary to the moral instructions, doctrines and canon law of the Catholic church and which causes injury to another as recognized by canon law or the civil or criminal laws of the State where a parish may be located or where the alleged offense occurred.

**Victim:** one who is harmed by or made to suffer from an act, circumstance, agency or condition; one who is tricked, swindled or taken advantage.

**Vulnerable Adults:** is understood as one who habitually lacks the full use of reason, is not responsible for his/herself and is equated with a minor.



## APPENDIX II.

### GUIDELINES FOR MAINTAINING A SAFE ENVIRONMENT FOR MINORS DURING EPARCHIAL /PARISH PROGRAMS

1. **Pre-approval from the Pastor** or appropriate leadership is needed for the validity of the event.
2. **Background Checks** – All persons over the age of 18 working with the program require background checks. The necessary applications for background checks for those of the Eparchy of Phoenix can be obtained from the Pastor and submitted to the Safe Environment Office at the Pastoral Center.
3. **Safe Environment Training** – All adults working with youth must have proof of having completed Safe Environment training on file at the Pastoral Center.
4. **Required Forms** – All pertinent and required forms must be completed, i.e., Pastoral Conduct Form for adults; permission and health forms for youth.
5. **Instructions/Procedures for a Specific Event** –in preparation for a program, participants and chaperones/staff must be informed about behavioral expectations.
6. **Adult Leaders and Chaperones** –There must be at least two adult leaders (21 years of age or older) to provide sufficient leadership for all parish sponsored activities. Ratio of adult to minor should be no less than 1 adult per 6 minors.
7. **One-on-One Contact** – When working with youth, it is important that the leaders of the group do not meet one-on-one (privately) with a young person (as per policy). In the rare situations that require personal conferences, the meeting is to be conducted in view of other adults and youths.
8. **Transportation** – When youth are being transported in vehicle, two unrelated adults must be present. An adult leader or chaperone should never be alone in a vehicle with a minor.
9. **Constructive Discipline** – Discipline used in youth ministry, educational and catechetical ministry should be constructive and reflect the Church's values. Corporal punishment is never permitted.
10. **Appropriate Attire** – Proper clothing for activities is required. Modest tops or T-shirts with acceptable wording and logos are allowed. Torn, ripped, or clothes with holes are not acceptable, neither are oversized clothes. Modest dress is always required. Example: No tank tops, halter tops, transparent blouses, very short or tight shorts or skirts, etc. The discretion of the adult supervisor will be respected.

11. **No Secret Organizations** – The Church does not recognize any secret organizations as part of its programs. All aspects of the youth program are open to observations by the Bishop, pastors, parents and leaders.
12. **Hazing** – Physical hazing and initiations are prohibited and may not be included as part of any activity. Adult leaders must monitor and guide the leadership techniques used by youth leaders.
13. **Alcohol and Smoking** – Youth and adults participating in the program are prohibited from the use of alcohol, smoking, any illegal drugs or the improper use of legal drugs.
14. **Supervisory Structure for Sleeping Arrangements and Bathroom Facilities** – To insure safety, specific requirements must be in place 24 hours a day.
  - Adults (18 and older) must have separate sleeping accommodations from the youth.
  - Two chaperones, one male another female, contingent on group (if not gender specific), must be arranged to ensure adult supervision throughout the night.
  - In the case of limited bathroom facilities, appropriate arrangements must be made for youth and adult to use the facilities independently.

**PASTORAL CONDUCT FORM FOR ADULTS WORKING WITH YOUTH IN  
PARISH/EPARCHIAL PROGRAMS**

I will:

- treat everyone with respect, loyalty, patience, integrity, courtesy, dignity, and consideration.
- refrain from using foul language and foul gestures at all times.
- refrain from smoking, using tobacco products, any illegal drugs or improper use of legal drugs at any time while serving children or youth in parish/archieparchial functions.
- refrain from using, possessing, or being under the influence of alcohol or illegal drugs at any time while serving children or youth in parish/eparchial functions.
- report any suspected abuse and neglect to the person in authority who will notify the Pastoral Center's Safe Environment Office and/or local child protection agency or civil authorities.
- cooperate fully in any investigation of abuse of children or youth.

I understand that failure to report suspected abuse to civil authorities is, according to the law, a Class B misdemeanor. The only exceptions to this requirement involve information learned only within the Mystery of Reconciliation or within an attorney-client privilege.

I understand that any action inconsistent with the above may result in termination of my giving services to children or youth.

I certify with my signature below that I have read the Sexual Misconduct Policy of the Eparchy of Phoenix and the Guide to the Policy.

Adult's Printed Name \_\_\_\_\_

Adult's Signature \_\_\_\_\_

Parish \_\_\_\_\_ Date \_\_\_\_\_

Signature of Pastor (as Witness) \_\_\_\_\_

## EXPECTATIONS OF CHAPERONES/STAFF DURING YOUTH PROGRAMS

### (Tailored to the event)

- To protect both the participants and staff alike and to insure safety for all, avoid any one-on-one situations with a teen.
- Likewise to insure a Safe Environment, all participants must be present at all activities for the duration of the event. Moreover, coming and going, or partial participation disturbs the dynamic process and continuity of the Youth Event on personal and communal spirit.
- In order to keep the integrity of the event, all public announcements will be assigned to a specific person.
- Direct any potential problems to the Event Leader or staff member.
- All medical issues are to be directed to the Event Leader or First Aid attendant.
- Curfews and quiet times are applicable for everyone, especially the adults, who are models for the event.
- In emergency situations, direct those specific teens in your care to the designated area, do a head count. If all are not present inform the event leader and/or staff.
- No adults, other than the leaders and/or facilitators are to be present during the talks and reflection times. Any additional adult presence unfairly inhibits the teens' openness and participation.
- As Christian models, respect for all participants is expected. Edifying speech and behavior are necessary components in Christian models. (No yelling or talking down to teens is ever acceptable.)
- Adult leaders are not called to "police" or control participants, but rather are to guide and lead teens by emulating the love, teachings, sacrifice and service of Jesus Christ.

**Expectations for Youth during the Program  
(Tailored to the event)**

- May not leave the premises of the event
- Must observe the curfew and quiet at night in the sleeping areas
- No electronic devices
- No Public or Private Display of Affection
- No smoking, use of drugs or alcohol
- No foul language or foul gestures
- Modest clothing appropriate to the activity
- Give the highest respect and dignity to everyone
- Maintain cleanliness of facilities and property
- All equipment returned and placed in its proper location

**In case of a general emergency immediately gather in the designated meeting area.**

## APPENDIX III.

### EPARCHIAL GUIDELINES FOR DIGITAL COMMUNICATIONS

**Guiding Principles (adapted from the USCCB Social Media Guidelines June 2010)**  
The world of digital communication, with its almost limitless expressive capacity, makes us appreciate all the more Saint Paul's exclamation: "Woe to me if I do not preach the Gospel" (1 Cor 9:16) – Pope Benedict XVI, 2010 World Communication Day message  
Social media is the fastest growing form of communication in the United States, especially among youth and young adults. Our Church cannot ignore it, but at the same time we must engage social media in a manner that is safe, responsible and civil.

#### Eparchy of Phoenix Guidelines

##### I. Introduction

These guidelines are intended to guide and enable appropriate use of digital media. Adherence to boundary issues as posed in the Policy and Procedures of Eparchy of Phoenix are applicable, whether face-to-face or via the digital media.

The following are the **minimal** guidelines to protect Church Personnel, youth and children. Leadership may expand upon these guidelines.

##### II. Legal Aspects of Digital Communication

1. Use of computers and internet connectivity should be consistent with the mission of the Church. In the use of computers, equipment and other related resources, church personnel must respect the privacy of other users, respect copyright and license agreements, protect data from unauthorized use or disclosure, and safeguard their accounts and passwords.
2. Church equipment is the property of the Eparchy, therefore must be used only for professional communications. Church personnel must not use computers for any illegal or immoral purpose. They must not transmit threatening, obscene or harassing materials or correspondence.
3. Church personnel must not engage in unauthorized distribution of data and information. They must refrain from revealing or publicizing proprietary or confidential information.
4. Church personnel must not communicate or advocate religious beliefs or practices contrary to the Catholic Church's teaching. Users must refrain from inappropriately representing opinions as those of the Eparchy of Phoenix, their Parish, or any of their official sub-entities.

5. Church personnel may not use the computers for private advertizing of products or services, or for any activity meant to foster personal gain. They must refrain from uploading or downloading commercial software in violation of its copyright.

### III. Guidelines for Eparchial / Parish Communication

All Eparchial or Parish digital communications must involve clear visibility, accountability, and responsibility at all times. These are not appropriate mechanisms for confidentiality and should never involve secrecy.

1. For a Parish Social network site, permission of the Pastor must be given prior to establishing a social networking site.
  - A separate Parish account is to be established; do not use a personal account for a social network site. There must be absolutely no "unofficial," "unauthorized," or "personal" Parish sites of any kind that use the Parish name, logo, parish information, parish membership network, or recognition either in fact (de facto) or in law (de juris).
  - There should be at least two site administrators (preferably more) appointed by the pastor for each site, to allow rapid response and continuous monitoring of the site.
  - Passwords and names of sites must be registered with the Pastor as well as in a central location and more than one adult should have access to this information.
  - All Parish social networking, blogs, chat rooms, instant messaging, texting, and web sites must be moderated at all times. No one may post anything to the public via these sites except with the review and approval of an official Parish site administrator for each message each time.
  - All Parish moderators/site administrators will receive instruction and guidelines from their Pastor, who is ultimately responsible, or his designee(s). All subsequent questions not covered clearly by their pastoral instruction and guidelines will be referred back to the Pastor or his designee(s) for additional guidelines and instruction.
  - All users of Parish social networking must be approved in advance by the Pastor or his designee(s).
  - The Pastor will be informed of and keep record of all Parish social networking site users, as well as all guidance and instruction given to Parish social networking site administrators.

- Conversations are to be brief and in line with the Policy and Procedures of the Eparchy.
  - All Parish social networking site users except ordained clergy and professed religious shall only write in the first person and never claim to represent the official position of the Parish, Eparchy, or the Catholic Church unless specifically authorized by the Pastor. Ordained clergy and professed religious will consult with and receive authorization from the Pastor before posting official positions on Parish social networking sites.
  - It is highly recommended to save copies of the correspondence with minors or vulnerable adults to avoid any negative implications. Chat or instant messaging should be discouraged.
2. All list serve or "blast" text messages etc. to all parishioners must originate with or be approved in advance by the Pastor.
  3. Written permission must be received from parents/guardians if there are photo/video of minors or vulnerable adults in any newsletter, website, blog, brochures or other promotional materials, etc. For the safety of the individual, use only the first name and set a reasonable length of time in the use of photo/video.

In addition, parents/guardians must have access to everything provided by Parish social networking to their minor children or vulnerable adults, including the opportunity to be copied on all such communications to or from their minor children or vulnerable adults. Parental access and copies may be by means of parallel technology that is more accessible to them.

Parish social networking moderators/site administrators and all users should not communicate privately with minor children or vulnerable adults. All such communications must be public and open to both the parents/guardians and the Pastor.

4. It is acceptable to use photos/videos in which people are unidentifiable, such as group photos. Permission or release forms are not necessary.



**The Pastor's Canonical Index to the  
Code of Canons of the Eastern  
Churches**

Compiled by

Reverend Monsignor Edward v. Rosack

December 10, 1992

Distributed to the Clergy and Religious

of the

Byzantine Catholic Eparchy of Vans Nuys

with the consent of Monsignor Rosack

by the

Most Reverend George M. Kuzma

Eparchial Bishop of Van Nuys

December 30, 1992

This index is a selective one, focusing primarily upon those canons with which the pastor can be expected to be concerned in the ordinary administration of the pastoral affairs of his parishioners.

The index contains but 215 entries, including those which are cross-indexed. It does not pretend to be exhaustive, but it is sufficient to provide pastors with ready reference to those canons which are of concern and of interest to them.

This note: offerings (stipends, stola) for ecclesiastical funerals are the concern of Canon 878, whereas offerings for other services are the province of Canons 715-717.

Please use this index with my compliments.



**A**

Aborted Fetus and Baptism, Canon 680  
Absolution, Communal, Canons 720-721  
Abstinence, Canon 882  
Acts, Juridic, Canons 931-935  
Administrative Decrees, Recourse Against, Canons 996-1006  
Adult, Age of, Canon 909, # 1  
Affinity, Canon 919  
Age, Adult, Infant, Minor, Canon 909  
    See Canon 29, #'s 1 & 2, Canon 30  
Alienation, Canons 1034-1042  
Anointing of the Sick, Canons 737-742

**B**

(Banns of Marriage), Canons 784-788  
Baptism, Canons 29-30 and 675-691  
Baptism and Rite, Canons 29-30  
Baptism, to Prove, Canon 691  
Baptized non-Catholics Coming into Full Communion with the  
    Catholic Church, Canons 896-901  
Bond, Marriage, Dissolution of, Canons 853-862

**C**

Cemeteries, Canons 874-879  
Chrismation (Confirmation), Canons 692-697  
Christian Faithful, Rights and Obligations of, Canons 7-26  
Churches, Canons 869-873  
Communal Absolution, Canons 720-721  
Communion to Infants, Canon 710  
Computation of Time, Canons 1543-1546  
Confirmation (Chrismation), Canons 692-697  
Consanguinity, Canon 918  
Consent, Matrimonial, Canons 817-827  
Contracts, Canons 1034-1042  
Convalidation of Marriage, Simple, Canons 843-847  
Cremation, Canon 876, #3

**D**

Day of Celebration of the Divine Liturgy, Canon 704  
Days of Penance, Canons 880-883  
Death, Presumed of Spouse, Canon 1383  
Declaration of Nullity, Canons 1357-1377  
Decrees, Administrative, Recourse Against, Canons 996-1006

**D, continued**

Diaconate, Age of, Canon 759, #1  
Dismissorial Letters, Canons 750-753  
Dissolution of the Bond, Marriage, Canons 853-862  
Dissolution of Non-consummated Marriage, Canon 1384  
Distribution of Communion, Canon 709  
Divine Eucharist, Canons 698-717  
    Concelebration, Canons 700-702  
    Danger of Death, Canon 708  
    Day of Celebration, Canon 704  
    Distribution by Christian Faithful, Canon 709, # 2  
    Easter, Canon 708  
    Eucharistic Fast, Canons 707 and 713, # 2  
    Fast, Canons 707 and 713, # 2  
    In Non-Catholic church, Canon 705, # 2  
    Infants, Canon 710  
    Offerings (Stipends, Stola), Canons 715-717  
    Commemorations in the Divine Liturgy, Canon 715, # 2  
        Divine Liturgy, Canon 715, # 1  
        Liturgy of the Presanctified, Canon 715, # 2  
    Priest, Unknown, Canon 703  
    Reduction of Obligations, Canons 1052-1054  
    Reservation, Canon 714  
    Time and Place, Canon 707  
    Vestments, Canon 707  
Domicile, Canon 912

**E**

Ecclesiastical Funerals, Canons 875-879  
Ecumenism, Canons 902-908  
Enrollment in Church *sui iuris*, Canons 29-38  
Eucharist, Canons 698-717 (See Divine Eucharist  
    above)  
Examination of the Parties for Marriage, Canon 784

**F**

Fast, Canons 707, 713, # 2, and 882  
Favor of the Faith, Marriage, Canon 1384  
Feast Days, Canons 880-883  
Fetus, Aborted and Baptism, Canon 680  
Foundations, Canons 1043-1054  
Funerals, Ecclesiastical, Canons 875-879

**G**

Glossary of Latin Terms, pages 735-736

**G, continued**

Goods, Temporal of the Church, Canons 1007-1054  
Governance, Power of, Canons 979-995

**H**

Holy Days of Obligation, Canon 880, #3

**I**

Images, Sacred, Veneration of, Canons 884-888  
Impediments in Marriage, Canons 790-812  
    Diriment, Canons 790-799  
    Specifically, Canons 800-812  
Infant, Age of, Canon 909, #2  
Infants and the Eucharist, Canon 710

**J**

Juridic Acts, Canons 931-935  
Juridic Persons, Canons 920-930

**L**

Latin Terms, Glossary, pages 735-736  
Lay Distribution of Communion, Canon 709, #2  
Letters, Dimissorial, Canons 750-753  
Liturgies, Reduction of Obligations, Canons 1052-1054  
Liturgy in Non-Catholic church, Canon 705, #2  
Liturgy, Stipends (Stola), Canons 715-717

**M**

Marriage, Canons 776-866  
    Abduction, Canon 806  
    Adoption, Canon 812  
    Affinity, Canon 809  
    Age, Canon 800  
    (Banns of Marriage), Canons 784-788  
    Conjugicide, Canon 795, #3  
    Consanguinity, Canon 808  
    Consent, Canons 817-827  
    Convalidation, Simple, Canons 843-847  
    Death of Spouse, Canon 807  
    Declaration of Nullity, Canons 1357-1377  
    Diriment Impediments, Canons 790-799  
    Dissolution of the Bond, Canons 853-862  
    Dissolution of the Bond in Favor of the Faith,  
        Canon 1384

M, continued

Marriage, continued

Dissolution of a Non-consummated Marriage, Canon 1384  
Engagements, Canon 782  
Examination of the Parties, Canon 784  
Favor of the Faith, Canon 1384  
Form, Canons 828-842  
Holy Orders, Canons 804 and 795  
Impediments, Specifically, Canons 800-812  
Impotence and Sterility, Canon 801  
Married Men and Sacred Orders, Canon 758, #3  
Mixed, Canons 813-816  
Non-baptized Person, Canon 803  
Non-consummated, Dissolution of, Canon 1384  
Preparation, Canon 783  
Presumed Death of Spouse, Canon 1383  
Prior Bond, Canon 802  
Procedures, Canons 1357-1384  
Public Propriety, Canon 810  
Sanation, Radical, Canons 848-852  
Separation of the Spouses, Canons 853-866  
    Dissolution of the Bond, Canons 853-862  
    Separation While the Bond Endures, Canons 863-866  
Separation of the Spouses, Cases, Canons 1378-1382  
Spiritual Relationship, Canon 811  
Validity of between Baptized Non-Catholics, Canon 781  
Vow of Chastity, Canon 805 and 795 Minor,  
Age of, Canon 909, #1

O

Oath, Canons 889-895  
Obligations of the Christian Faithful, Canons 7-26  
Obligations, Divine Eucharist, Reduction of Canons 1052-  
1054  
Offerings (Stipends, Stola), Canons 715-717  
Commemorations in the Divine Liturgy, Canon 715, #2  
    Divine Liturgy, Canon 715, # 1  
    Ecclesiastical Funerals, Canon 878, # 2  
    Liturgy of the Presanctified, Canon 715, # 2  
Offices, Canons 936-978  
Ordination, Sacred, Canons 743-775  
    Married Men and Sacred Orders, Canon 758, # 3

P

Pastors, Canons 1388-1400  
    Removal, Canons 1389-1396  
    Transfer, Canons 1397-1400  
Penance, Canons 718-736  
    Cases of Infirmary, Canon 736, #2  
    Place, Canon 736, #1  
Penance, Days of, Canons 880-883  
Peregrinus , Canon 911  
Persons, Juridic, Canons 920-930  
    Definition, Canon 921, # 2  
Persons, Physical, Canons 909-919  
Place of the Celebration of the Divine Liturgy, Canon  
    707  
Places, Sacred, Canons 868-879  
Power of Governance, Canons 979-995  
Preparation for Marriage, Canon 783  
Presbyter, Age of, Canon 759, #1  
Prescription, Canons 1540-1542  
Preservation of Rites, Canons 39-41  
Presumed Death of a Spouse, Canon 1383  
Priest, Unknown, Canon 703  
Procedures, Matrimonial, Canons 1357-1384

Q

Quasi-domicile, Canon 912

R

Reason, Age of, Canon 909, # 2  
Reception into the Church of one who has not completed his  
    fourteenth year, if parents are opposed, Canon 900, # 1  
Recourse Against Administrative Decrees, Canons 996-1006  
Reduction of the Obligations of Divine Liturgies,  
    Canons 1052-1054  
Relics and Veneration, Canons 884-888  
Removal of Pastors, Canons 1389-1396  
Reserved Sins, Canons 728-729  
Rights and Obligations of Christian Faithful, Canons 7-26  
Rite, Definition, Canon 28  
    Enrollment, Canons 29-38  
    Preservation, Canons 39-41  
    Transfer, Canons 31-38

## S

Sacramentals, Canon 867  
 Sacred Images, Veneration, Canons 884-888  
 Sacred Ordination, Canons 743-775  
     and Married Men, Canon 758, #3  
 Sacred Places, Canon 868-879  
 Saints, Veneration, Canons 884-888  
 Sanation, Radical, Canons 848-852  
 Separation, while the Bond endures, Canons 863-866  
 Separation of Spouses, Cases, Canons 1378-1382  
 Sick, Anointing of, Canons 737-742  
 Sinners and Ecclesiastical Funeral, Canon 877  
 Sins, Reserved, Canons 728-729  
 Sponsor at Baptism, Canons 684-685  
     if no sponsor, Canon 688  
 Stipends (Offerings, Stola), Canons 715-717  
 Commemorations in the Divine Liturgy, Canon 715, #2  
     Divine Liturgy, Canon 715, #1  
     Ecclesiastical Funerals, Canon 878, #2  
     Liturgy of the Presanctified, Canon 715, #2  
 Sui iuris, Definition, Canon 27  
 Sunday Obligation, Canon 881

## T

Temporal Goods of the Church, Canons 1007-1054  
     Acquisition, Canons 1010-1021  
     Administration, Canons 1022-1033  
     Alienation, Canons 1034-1042  
     Contracts, Canons 1034-1042  
     Foundations, Canons 1043-1054  
     Wills, Canons 1043-1054  
 Terms, Glossary of, pages 735-736  
 Time, Computation of, Canons 1543-1546  
 Time and Place for the Celebration of the Eucharist,  
     Canon 707  
 Transfer of Rite, Canons 31-38  
 Transferring of Pastors, Canons 1397-1400  
 Traveler, Canon 911

## U

Unknown Priest, Canon 703

## V

Veneration of Relics, Canons 884-888  
 Veneration of Sacred Images, Canons 884-888  
 Veneration of Saints, Canons 884-888 Vestments,  
     Canon 707  
 Vow, Canons 889-895

## W

Wills, Canons 1043-1054

**CCEO Requirements for Consent or Consulting the Consultors-Presbyteral Council-Finance Council**

<b>CANON</b>	<b>SUMMARY</b>	<b>Consultors</b>	<b>Presby Council</b>	<b>Finance Council</b>
236 §1	Convening of Eparchial Assembly		Consult	
262 §1	Appointment of Eparchial Finance Officer	Consult		Consult
262 §2	Removal of Eparchial Finance Officer	Consult		Consult
263 §1	Appointment of Finance Council	Consult		
263 §4	Matters of great economic importance			Consult
276 §2	Establish, modify, suppress Protoperbyterates		Consult	
280 §1	Establishing personal parish		Consult	
280 §2	Erect, modify, suppress a parish		Consult	
282 §1	Erect a parish in the church of a religious institute		Consult	
284 §3 3°	Naming a religious pastor of a religious parish for a set term	<b>CONSENT</b>		
291	Remuneration of offerings for pastoral services		Consult	
873 §2	Relegate a church to profane but not sordid use		Consult	
1012 §1	Impose a tax on a juridic person			<b>CONSENT</b>
1036 §1 1°	Alienation of property within minimum and maximum	<b>CONSENT</b>		<b>CONSENT</b>