

Clergy Transition

Metropolis Strategic Plan Goal 2.2

Opening Letter

Greetings in the Name of our Lord and Savior Jesus Christ!

Welcome to the comprehensive resource for Clergy Transition from the Greek Orthodox Metropolis of Atlanta.

Through this resource, we hope to offer a guide for clergy and their families who are in the process of assignment or transition to a parish. This resource also offers a guide for parishes who are also in the process of transition seeking a priest to serve their parish family.

This resource offers guidelines and helpful tips to clergy and lay leadership in order to insure a smooth transition during a critical stage for all those concerned.

These guidelines are based on data received from questionnaires, interviews with Church leaders, and feedback from both clergy and laity. They are presented in order to make the process of receiving a new priest a joyful one for the parish, the clergyman and his family. It is understood that each parish will have particular needs unique to their situation and that these things should always be taken into consideration with the assistance and guidance of the local Hierarch and Chancellor.

The information provided may not be able to anticipate every possible scenario involving clergy transition, but our prayer is to make this a joyful experience that reflects an Orthodox Christian phronema or mindset.

Through the Grace of our Lord and Savior Jesus Christ, the True High Priest, the Love of God the Father and the Holy Spirit, which makes God works operable in our lives, may we rejoice toward the goal of providing our parishes with the best possible leaders to grow our Orthodox Faith for many years to come.

The Metropolis of Atlanta 2.2 Task Force Team

Overview of Clergy Transition

“And as you wish that men would do to you, do so to them.”

Luke 6:31.

“Let all things be done decently and in order.”

1st Corinthians 14:40.

Framework of Clergy Transition

- Clergy Transition includes many variables for Clergy and their families and the parish.
- Since the assignment of a priest to a community can be considered as sacred as the marital relationship, it is crucial that all steps are taken to make the right match for the priest and the parish. Clergy want to succeed in their priestly ministry and parishes want to have a faithful and skilled leader.
- The first step in all circumstances, following the proper protocol, is for Priest seeking assignment and for a parish in need of a priest to contact their respective Hierarch and Chancellor.
- The second step is to Pray. Prayer is essential for a spiritually wholesome transition – Perhaps the most thoughtful action for clergy and a parish during the transition process is to pray to God in the Holy Spirit to be their constant Guide. Our most profound example is our Lord and Savior Jesus Christ Who prior to calling His disciples, went out to the mountain to pray to His God and Father. In the Gospel of St. Luke, we read that He prayed all night. When the sun came up, He called His disciples to serve. He did this by calling them by name (Luke 6:12). He then proceeded to heal all those He encountered to convey several important teachings in what we know as The Beatitudes. In verse 31, of the same chapter he says, “And as you wish that men would do to you, do so to them.” St. Paul adds in his first letter to the Corinthians the following, “Let all things be done decently and in order” (1 Cor. 14:40).
- Prayer will remind us to be mindful of our Lord and St. Paul’s words in order to make the entire experience of clergy and parish transition a successful and seamless one. This is the goal of these guidelines and it is for the good of the Church, the parish and the clergy. Therefore, we begin this important journey by praying for the Holy Spirit to come down upon all those participants in this momentous process.

There are Fourteen (14) Steps to assist in times of Clergy Transition.

Those Steps are:

STEP 1

- Becoming Acquainted with the Leadership of our Metropolis

STEP 2

- A Written in-depth Biography

- STEP 3
- Family details
- STEP 4
- Education and Work Experience
- STEP 5
- Special Health Considerations
- STEP 6
- Timing of Assignments and Transfers
- STEP 7
- Reveal Meeting and/or Visiting the Parish in Advance of Assignment
- STEP 8
- Preparing the way for your successor
- STEP 9
- Clergy Welcoming Committee and Welcoming Packet
- STEP 10
- Housing Considerations During Transition
- STEP 11
- Parish Information Packet
- STEP 12
- Remuneration Details
- STEP 13
- The Archdiocese Pension Program
- STEP 14
- THE ASSIGNMENT OF AN EPHIMERIOS/ASSISTANT PRIEST

Step 1

Becoming Acquainted with the Leadership of our Metropolis

Each clergyman who is seeking assignment in or transferring into the Metropolis of Atlanta should become acquainted with the leadership in the Metropolis where he may be assigned. It is also highly recommended that all clergy within the Metropolis meet periodically with His Eminence

and the Chancellor to discuss their particular desires to seek a transfer now or in the near future. Dialogue with His Eminence and the Chancellor will keep everyone informed and assist in assigning clergy to parishes that may be in need of a clergyman.

Step 2

A Written in-depth Biography

A clergyman should provide the Metropolitan and the Chancellor with a written in-depth biography regarding his own life and calling to the Holy Priesthood and a current resume.

Step 3

Family details

In addition, the clergyman should provide, when applicable, details about his family, (number of children, if any, their age, etc).

Step 4

Education and Work Experience

To achieve the best fit, the clergyman should provide details of his and his presbytera' s education, work experience, accomplishments, and any other important information that would assist in the transition process.

Step 5

Special Health Considerations

The Clergy Families' welfare is directly related to the success of the clergyman in his parish. Therefore, sharing with the Hierarch and Chancellor any and all special health considerations is very important.

For example:

- A. Health concerns or special requirements for the priest, presbytera or children.
- B. Children that may require particular assistance with daily needs and educational support.
- C. Special medical treatment that is only available in certain geographical areas.

Step 6

Timing of Assignments and Transfers

There are many practical aspects that must be considered regarding the timing of an assignment or transfer.

It is highly recommended that clergy should be not assigned to a new parish for a prolonged period without his entire family, (wife and children) joining him.

Moving is stressful for all clergy. There can be both positive and negative emotion for all concerned. (See Step 10 Relocation tips and guidelines)

A Clergy Welcoming Committee formed in each parish is crucial to providing a smooth and joyful transition for the clergy, his presbytera and family.

Step 7

Reveal Meeting and/or Visiting the Parish in Advance of Assignment

It is up to the discretion of the Hierarch as to the procedure for introducing a newly assigned clergyman to the parish. The present practice is for His Eminence and the Chancellor to present the newly assigned clergyman officially at a reveal meeting with members of the Parish Council.

When possible, it would be beneficial to both the clergy and the parish lay leadership to meet in advance of the official assignment.

The expenses of such a visit should be assumed by the parish.

The parish should provide the prospective clergyman with parish historical information or the priest should request such information.

Step 8

Preparing the way for your successor

There are many issues to consider when one clergyman is leaving a parish and a new one is being assigned. There are challenges for the clergy and the parish. Please read further for detailed guidelines to assist in making this a smooth transition for all.

GUIDELINES FOR CLERGY LEAVING THEIR PRESENT PARISH AND PREPARING THE WAY FOR THEIR SUCCESSOR

- ▶ For the clergyman leaving his parish, the central task is to leave well and prepare the way for a successor.
- ▶ St. John the Baptist often is cited as a model. His total life in ministry was preparing the way for another, even to the point where essentially tells his disciples to, “Quit following me and to follow him.”
- ▶ For long-time leaders, especially those who retire, leaving can raise fears about loss of power and position. In the parish setting, transitions stir a range of emotions, including loss, anger, elation, indifference, confusion and hope.
- ▶ Consequently, it is essential that the priest exit be handled well.
- ▶ A good ending is the foundation of a good new beginning for the next priest.

- ▶ The clergyman leaving his parish should make sure the church is in good order, with strong and functioning lay leadership and clear, updated financial, sacramental registry records and any other records.
- ▶ A confidential memo or briefing on issues in the parish, assessments of lay leadership, and other matters also can be useful for the new assigned clergyman.
- ▶ A list of church personnel and volunteers, access passwords for parish computer programs, etc., membership data, pastoral care matters such as shut-in members, upcoming sacraments, church schedules and more.
- ▶ Part of a successful transition is emotional, as well. In the time before leaving the parish, the priest should help the parish shift its focus to the future.
- ▶ If people want to throw a going-away party, for example, the priest should ensure the event is not about him, but is a celebration of their ministry together.
- ▶ If the priest who is leaving knows the new priest being assigned it would be good for him to verbally encourage the parishioners to welcome and support him. Saying things in a positive light about the new priest reassures the parish that the transition will go smoothly.

- ▶ For many priests, there is the temptation to stay involved with former parishioners -- to return for funerals, baptisms and weddings, etc., but this should be resisted, as it does not assist the new priest in connecting with his parishioners.

The following steps should have been taking place simultaneously throughout the entire transition process. The steps below provide important details.

Step 9

CLERGY WELCOMING COMMITTEE AND WELCOME PACKET

*Each parish under the leadership of their
Parish Council will form a
Clergy Welcoming Committee*

Upon the Official Assignment by the Hierarch, the Clergy should contact the Welcoming Committee to coordinate the following:

- 1) A reception for the new priest (and his family when applicable), after the first Sunday Divine Liturgy or when the entire priest's family can be present.
- 2) Other events so that the priest, (presbytera and his family) can meet members of the parish family.
- 3) We should not overlook the importance of offering our Presbyteres the same care and attention in the moving experience. Studies tell us that much of the pressure of any relocation falls on the shoulders of our spouses. It is important to direct some personal attention to our Presbyteres, which will also help to relieve much of the pressure that is on our Clergy during their relocation.
- 4) Create a welcoming plan customized to meet the unique needs of the individual priest and parish.
- 5) To review upcoming meetings, events, etc., so that a Welcome Committee member can be assigned to accompany the priest and presbytera to various events in the first month and help him and her get acquainted with the leaders of various ministries and parishioners. (i.e. The Philoptochos President meets with the new clergyman and

presbytera and accompanies them to the first general meeting).

Step 10

Housing Considerations During Transition

Relocation Policy Guidelines Greek Orthodox Metropolis of Atlanta

PROGRAM ADMINISTRATION

The Greek Orthodox Metropolis of Atlanta relocation program is intended to assist you by providing a benefit program to facilitate your relocation while minimizing personal disruption. **All Clergy and Parishes in transition may choose the services Hilldrup Relocation but are not obligated to do so.**

The specific categories of assistance provided to transferees are as follows:

- Program Administration
- Home Marketing Assistance
- Transportation of Household Goods
- Destination Services
- Tax Information

At any time during your relocation, please contact your Hilldrup Consultant with any questions.

All requests for information or services other than questions about the Relocation services should be directed to The Greek Orthodox Metropolis of Atlanta.

IRS DISTANCE AND TIME REQUIREMENTS

According to the Archdiocese regulations moving expenses are to assumed by the parish the priest is being assigned to, however, there may be occasion when there are additional expenses related to the move that may be tax deductible. Below are the statues that apply.

This Program is subject to current federal statutes regarding move distance requirements related to eligibility for tax deduction; the distance over the shortest, most commonly traveled route from the former residence to the new work location must be fifty (50) miles greater than the distance from the former residence to the former work location.

In order for a taxpayer's moving expenses to be deductible, an employee must not only meet the distance requirement, but must also be a full-time employee in the general location of the new residence for at least thirty-nine (39) weeks in the twelve (12) month period immediately following the start of work in the new location.

RECORD KEEPING

The tax ramifications involved with relocation require very careful record keeping by you and the parish in which the clergyman is being assigned. It is important for you to understand that all records and receipts should be accurately kept to comply with tax regulations and to facilitate efficient implementation of the relocation process.

HOME MARKETING ASSISTANCE

Hilldrup Relocation will provide marketing assistance by referring two (2) relocation-trained and experienced agents to you. They will each present a thorough marketing strategy and prepare a Broker Market Analysis (BMA) which includes:

- Suggestions on how to prepare your home for sale
- A recommended list price and “Most Likely Sales Price”
- Information on competing properties for sale and recently closed comparable homes
- A designated buyer profile for your property

All real estate commission and closing costs associated with the sale of your home are not eligible for payment or reimbursement.

HOME PURCHASE ASSISTANCE

For those associates planning to purchase in the destination location, Hilldrup offers professional home finding consultation and assistance. All closing costs associated with the purchase of a new home are not eligible for payment or reimbursement.

A qualified real estate broker in the destination area will be referred to assist you with selecting a community and home or rental in the new work location. Hilldrup will help you by evaluating your housing, community needs, relocation benefits interpretation, and financial/mortgage pre-qualification. The home finding program includes the following assistance:

- Identifying your needs concerning housing
- Referrals to national mortgage lenders that offer competitive-rate products
- Recommending a qualified real estate broker in the new area
- Placing you in touch with this broker
- Assisting you with local custom information and negotiation strategy
- On-going support and follow-up

The recommended real estate broker/rental agent in the new area will:

- Answer questions about area communities, tax and school comparisons, public transportation, medical, cultural, shopping, banking and recreational facilities, and other data
- Provide relocation packets that contain state and local information of interest, maps, updated mortgage information and any other material you may specifically request
- Provide a guided tour of area homes and communities

- Coordinate the search for a suitable home based on your needs and preferences, with information on homes in the appropriate price range in selected areas

RENTAL ASSISTANCE

If you chose to rent in the new location, you are eligible for Rental Counseling provided by Hilldrup. This includes services, such as:

- Website referrals
- Reviewing the lease terms
- Installing a job transfer cancellation clause

TRANSFER CLAUSE

You SHOULD include the following "Transfer Clause" when executing a lease agreement in the new area:

"It is mutually agreed by the parties hereto, that this lease may be terminated by the tenant in the event he/she is transferred from (your new residence area), provided the tenant gives 60 days' notice in writing of such cancellation, and if tenant agrees to forfeit his/her security deposit, and the transfer is confirmed in writing by the employer."

Hilldrup can also offer a rental assistance program that provides a streamlined, personal solution for the rental assistance needs of relocating associates. Associates will work hand in hand with a Destination

Services Consultant to perform customized research and property vetting. The program includes:

- Phone consultation and needs assessment to determine housing, lifestyle, commute and area preferences
- Destination area overview including neighborhood characteristics, rent ranges and rental market trends
- Initial list of properties best matching budget, needs lifestyle, and area preferences

HOUSE HUNTING TRIP

Associates will be permitted up to a four (4) day house hunting trip prior to relocation. This trip allows for the associate along with one significant other to travel to their given work destination and seek housing, become familiar with the community and help determine their needs prior to moving. Hilldrup Relocation will assist with the coordination of your round trip airfare, rental car and hotel accommodations. A fourteen (14) day advance notice is required for all travel arrangements.

- Flights to and from destination.
- Rental car charges (Intermediate rental car)
- Round trip mileage from origin to destination if driving a personal vehicle
- Reasonable hotel stays up to the four (4) day travel limit
- A \$50 meal allowance per person/per day
- If desired, a realtor guided tour of the area and surrounding communities would be conducted during this trip

TRANSPORTATION OF HOUSEHOLD GOODS

Hilldrup will coordinate moving your personal household goods to the new location. All usual and reasonable costs for packing, loading, valuation, transporting, and delivery of the furniture and household effects will be direct-billed to parish of the new assignment.

When you are planning your move (please provide at least thirty (30) days prior to the move date), you should immediately notify Hilldrup. Hilldrup will coordinate moving services and authorize a Company approved moving company to contact you. The moving company will make an appointment to survey the household goods to determine approximate van space requirements and set packing, loading and delivery dates. They will provide you with a range of delivery dates within which you can expect delivery of your goods. ***You must be available to accept delivery from the first scheduled delivery date, while the carrier is obligated to deliver by the last date.*** All moves will be scheduled during weekday dates and normal business hours for packing, loading, and delivery.

Various items that will not be shipped at Company expense include, but are not limited to, the following:

1. Jewelry and precious stones
2. Coin and stamp collections
3. Perishable items, combustible items, or items that may cause contamination or damage to other goods
4. Potentially hazardous items, corrosive liquids, and flammable items (i.e., bleach, antifreeze, disinfectants, spot cleaners, etc.)
5. Handguns and ammunition cannot be moved in compliance with federal laws
6. Gun safes
7. Patio slate, bricks, cement, sand, firewood, rocks, lumber or building materials
8. Boats or other watercraft
9. Motorcycles
10. Recreational vehicles or airplanes
11. Indoor/outdoor plants, fertilizer
12. Large machinery/workshop equipment, outbuildings, storage sheds, greenhouses or farm equipment
13. Satellite dishes in excess of 18"
14. Wine collections that require special climate control environments for shipping or storage
15. Disassembled vehicles and motors
16. Swimming pools
17. Live animals of any kind
18. Draining of waterbeds will not be authorized for payment
19. Playground equipment, unless it is of reasonable size, and dismantled/reassembled by owner
20. Cash, financial documents, deeds

21. Special equipment or additional manpower required by the van line to move heavy personal items (pool tables)

Other expenses that will not be authorized:

1. Weekend or holiday packing, loading or delivery
2. Extra pick-ups outside a fifty (50) mile radius
3. Exclusive use of moving van
4. Waiting time
5. Removing any mounted items from ceilings and walls, i.e.: light fixtures, chandeliers & TV's
6. Disassembly of any weight, work out equipment, trampolines or any outdoor play equipment
7. Disconnect/Reconnection of any electronic or computer equipment
8. Disconnect/Reconnection of appliances with the exception of clothes washers, clothes dryers and ice makers

SHIPMENT OF AUTOMOBILES

One vehicle will be transported for moves greater than 500 miles. Shipment of your auto will be via the most cost-efficient method, via car carrier service.

VALUATION COVERAGE OF HOUSEHOLD GOODS

Full valuation coverage is provided for loss and/or damage of authorized household goods and personal effects. The actual amount of coverage is based upon the total weight of the shipment.

LOSS AND/OR DAMAGED CLAIMS

It is your responsibility to file a claim with the moving company due to loss or damages related to transported goods as soon as possible but no later than ninety (90) days after delivery. Upon completion of the delivery, you should inspect all belongings and note any damages to shipped items or the boxes they were transported in on the inventory list. *When you sign the delivery receipt, the goods are accepted in "as is" condition except as noted on the receipt you must note on the form "subject to further inspection".* Any noticeable damage at the time of delivery should be brought to the attention of the driver and followed up by you with a claim in writing to the carrier. The best proof of claim is a notation on the bill of lading, inventory listing or delivery report provided by the carrier at the time of delivery. The moving company may restore any damaged articles to its preloading condition or replace them at their full value, whichever is less. For missing items and those that cannot be repaired, the moving company will pay you an amount equal to the cost of a similar item of the same kind of quality e.g. like, make, and model. In all cases, in order to submit a claim, you must sign the inventory list acknowledging articles that are being loaded and the condition of those articles at the time of loading in the van.

TEMPORARY STORAGE

The parish where the priest is being assigned is asked to cover up to thirty (30) days of temporary storage at destination.

TEMPORARY LIVING

Temporary living accommodations can be available if you are unable to move into your new home or apartment at the time of arrival at your new location. Hilldrup Relocation will provide you with temporary lodging accommodations. Authorization is up to thirty (30) days.

FINAL RELOCATION REIMBURSEMENT

The final trip to the home destination includes reimbursement for travel expenses, such as reasonable lodging, meals & mileage. A one-way flight to destination will be covered for all members of the employee's family, if traveling over 500 miles. If traveling by personal vehicle, mileage from origin to destination will be reimbursed. A \$50 meal allowance per person/per day is provided.

TAX TREATMENT AND TAX ASSISTANCE

Under current Internal Revenue Service regulations, The new parish is required to report as income to you most of the relocation expenses paid on your behalf or for which you are reimbursed. However, you may be entitled to claim a deduction on your personal income tax return for certain expenses.

You are encouraged to seek tax advice from the IRS or your tax advisor or accountant in order to determine the impact of deductible and non-deductible reimbursements on your individual tax liability.

Step 11

Parish Information Packet

Important information from the Parish Council

The Parish Council should provide (at a minimum) to the newly assigned priest the following information:

- 1. A detailed narrative on the state of the parish.**
- 2. Current number of pledging families.**
- 3. The most current financial reports, including the annual budget, profit and loss statements and balance sheets.**
- 4. Most recent parish directory, bulletins/newsletters from the previous year to present.**

5. A Master Calendar with upcoming services and events.
6. Past parish yearbooks and directories.
7. A list of parish ministries with names and contact information of chairpersons/leaders.
8. The Parish Council may also choose to include other pertinent information that would assist the newly assigned priest in becoming acquainted and up to speed with the parish.

Step 12

Remuneration Details

Compensation of the clergy is a very important and sensitive area during clergy transition. Read the guidelines to assist in making this process a successful one.

REMUNERATION DETAILS

- Clergy should not discuss remuneration with the prospective parish of assignment.
- Clergy should provide the respective Hierarch and Chancellor with a written document outlining current compensation and amount owed for all student loans, if applicable.
- The clergyman and his presbytera should arrange to meet with the Hierarch and Chancellor to discuss financial expectations or special circumstances.

- Information regarding the obligatory participation in the pension program and the health plan of the Archdiocese should be provided.
- The Archdiocese Remuneration Scale, which is distributed to all parishes annually, shall serve as a foundational guide in determining salary and benefits.
- Special considerations, i.e. cost of living based on geographical location, size of the parish, education level and experience of clergyman should all be considered in determining remuneration.
- Parishes should also contact the Archdiocese Chancellor's Office for guidelines on issuing W-2 forms and other tax laws regarding housing allowances, transportation, health insurance, etc.
(Reference also Archdiocese Regulation, Article 17, section 8).
- Especially for first assignments, priests should also contact the Archdiocese Chancellor's Office to obtain guidance on current clergy tax laws.
- A W-4 form must also be completed and kept on file in the church office before the first pay period.

Step 13

The Archdiocese Pension Program

Participation in the Archdiocesan Pension Program is essential for both the Clergy and Parish.

The Clergy offer a personal monthly contribution that directly affects their pension.

The Parish offers a monthly contribution for each clergyman serving their parish. These funds are not considered a part of the Clergy's annual compensation. These funds help maintain the viability of the Pension Program.

THE ARCHDIOCESE PENSION PROGRAM

- **Every parish that has been assigned a priest must participate in the Archdiocese Pension Program and be current in their monthly contributions.**
- **The monthly parish contribution is to help maintain the financial viability of the pension program, cover the cost of administration and offer the following benefits:**
 - **Basic Life Insurance**
 - **AD&D – Accidental death and dismemberment**
 - **Long-term disability**
 - **Travel accident coverage**
 - **Aetna (CAP) Program – Confidential Assistance Program**

Step 14

THE ASSIGNMENT OF AN EPHIMERIOS/ASSISTANT PRIEST

Several parishes in our Metropolis have more than one clergyman assigned and serving the faithful.

All the steps above should be applied and in addition, please read below for more guidelines.

ASSIGNMENT OF AN EPHIMERIOS/ASSISTANT PRIEST

- **A collaborative effort is imperative between the Hierarchy, Chancellor and Proistamenos when considering candidates for assignment as Ephimerios/Assistant Priest.**
- **The Proistamenos should meet with potential candidates, with the blessings of the Hierarchy and offer feedback to the Hierarchy and Chancellor.**
- **The Hierarchy, Chancellor, Proistamenos and Parish Council President should meet the potential candidate in advance of final assignment.**

- **If this is the first time the Proistamenos will be having an Assistant Priest, he should seek the counsel of his Hierarch and Chancellor and other Proistamenoι with experience in this area.**
- **All the Guidelines in this document and the Guidelines for Parishes pertaining to the assignment of a Proistamenos should apply to the Assistant Priest as well.**

IMPORTANT STANDARDS TO CONSIDER IN THE WORKING RELATIONSHIP BETWEEN PROISTAMENOS AND ASSISTANT PRIEST

- **The Proistamenos should schedule several meetings with the new Assistant Priest to get acquainted and discuss expectations, including but not limited to, work schedule, days away from the office and overall parish vision.**
- **The Assistant Priest's essential role is to be supportive of the Proistamenos at all times and never undermine him in his priestly ministry.**
- **Differences of opinions should only be discussed privately and never in a meeting or in front of parishioners.**
- **On occasion, a new Proistamenos may be assigned to a parish that already has an**

Assistant Priest, in these instances, the same courtesies and procedures should be extended.