

**COUNCIL OF PRIESTS**  
**The Catholic Center**  
**Raleigh, NC**  
**Tuesday, May 10, 2016**

Lunch was served at noon in Conference Room 1A and 1B – First Floor

**MEMBERS OF THE COUNCIL**

President: Most Reverend Michael F. Burbidge

Deans:

Very Reverend James Garneau, V.F., Very Reverend Gregory Lowchy, V.F., Very Reverend Gregory Spencer, V.F., Very Reverend Scott E. McCue, V.F., Very Reverend John E. McGee, O.S.F.S., V.F, Monsignor Steven V. Carlson, V.F. Very Reverend Justin Kerber, C.P.,V.F.

At-Large Elected Members:

Monsignor Michael P. Shugrue, Monsignor Gerald L. Lewis, Reverend Donald F. Staib, Reverend Thomas S. Tully, Reverend Daniel D. Oswald, Reverend Michael T. Martin, O.F.M. Conv., Reverend Phillip R. Hurley, S.J.

Ex-Officio Members:

Monsignor David D. Brockman, V.G., Very Rev. Marcos Leon-Angulo, V.E. Very Reverend Carlos Arce, V.E., Monsignor Girard M. Sherba, V.J., Monsignor John Williams, V.E.

College of Consultors:

From the Council of Priests, the following are appointed to the College of Consultors: Very Reverend Carlos N. Arce, V.E. Monsignor David D. Brockman, V.G. Very Reverend S. James Buchholz, Very Reverend James F. Garneau, V.F. Monsignor Jeffrey A. Ingham, Monsignor Girard M. Sherba, V.J., Reverend Joseph G. Vetter

Excused for today's meeting: Monsignor Steven V. Carlson, V.F., Monsignor Girard M. Sherba, V.J. and Reverend Justin Kerber, C.P., V.F.

Very Reverend John E. McGee, O.S.F.S., V.F., Vice Chair, chaired this meeting.

Minutes of the February 23, 2016 Meeting were approved.  
The agenda for this meeting was also approved.

### Father John McGee Report on the Meeting of the Deans

Items Reported on:

Funding requests to help lower the subsidy for parishes in the Cap Fear, Raleigh, and Tar River Deaneries.

Discussion of Priest Personnel issues

Update on the high school feasibility study for Cape Fear Deanery

Update on the 2017 Confirmation schedule

Update on the incardination processes for priest applicants

Reports made by the Deans from each Deanery

Mr. Ryan Flood reported on the parish assistance grants

Cathedral update

Mr. Michael Bayer was introduced as the new Senior Diocesan Director of Youth and Young Adult Ministry

Bishop Burbidge asked for continued prayers for Msgr. Steven Carlson and also for Rev. Justin Kerber and also for the Passionists Order, which is holding their community meetings this week.

## Proposed Diocesan Budget for 2016-17

Mr. Russ Elmayer, Mr. Michael D'Ercole

Mr. Elmayer and Mr. D'Ercole gave descriptions of items which were part of the Budget information sent to members.

Items presented are in Attachment 1

Motion made to accept the Budget as proposed.

Motion passed

## Priest Pension Plan Funding: Analysis and Recommendation

Mr. Russ Elmayer, Mr. Michael D'Ercole

Items presented are in Attachment 2

Given that the funded status of the priest pension plan is expected to be at just over 90% funded at the end of June 2016, and given that a 90% funded status is a reasonable target, motion made to reduce the Contingent Liability Self-insurance assessment by 50% for 2016-17, then eliminate it in 2017-18. Also, to reduce the Priest Welfare and Retirement assessment from 5.8% of prior year offertory to 5.0% of prior year offertory for the 2016-17 year.

Motion passed

## Proposed Catholic Charities Budget for 2016-17

Mr. Russ Elmayer

Mr. Elmayer noted the Catholic Charities budget will be presented after Mr. Shane Nolan, newly appointed Special Advisor to the President of Catholic Charities, has a chance to review the operations and make

recommendations; a fiscal year end deficit of \$350,000 is projected. Revenues from grants and other sources were below budget, and there was not a reduction in expenditures when the budgeted revenues did not materialize.

### Review of Updated Document: *General Norms for the Celebration of the Sacred Liturgy of the Mass in the Forma Ordinaria*

Father Ryan Elder, Mr. Aaron Sanders

Father Elder and Mr. Sanders answered several questions regarding the document revised since the last Council meeting. The revised document was sent to members of the Council before today's meeting.

Motion made to accept the document as revised.

Motion passed

Motion made to change the title of the document to eliminate the words '*Forma Ordinaria*' from the title of the document.

Motion defeated

### Liturgical Formation on *Revised Order of Celebrating Marriage*

Msgr. David Brockman, Mrs. Aimee Viana and Mr. Aaron Sanders

Msgr. Brockman noted preparations are being made to provide workshops and information for priests, deacons, and lay leaders for the revised order, which is to implemented in the Church throughout thr world on December 31, 2016.

## Rite of Christian Initiation

Msgr. David Brockman, Mrs. Aimee Viana and Mr. Aaron Sanders

Information as presented to show an increase the numbers of school age children being presented in parishes for initiation into the Church.

Presenters also reported on recent experiences of the Diocesan Rite of Election and on the RCIA program in parishes.

The Diocese will survey parishes about experiences with children seeking sacraments and reception into the Church regarding best practices and what assistance is needed in parishes.

Members of the Council offered many observations, questions, and suggestions for the survey and study.

## Review of Draft Document: *Protocols for Receiving Priests from Outside the United States for Ministry in the Diocese of Raleigh*

Msgr. Brockman

Discussion revolved around document sent to members and which has been detailed since the presentation of a schema for the document at the previous meeting. The members made suggestions for additions to the document, especially with regard to cultural orientation, administrative orientation and the content of the Memorandum of Understanding.

## Cathedral Project Update

Bishop Burbidge noted that the Project is now 50% complete.

Naming opportunities are continuing.

Diocese will contact 13,000 who are new to the Diocese since the first Campaign.

A Dedication Committee is being formed.

June 2017 is the tentative completion date for the Cathedral Project. A dedication date will be coordinated with the schedule of the new Nuncio to the United States, Archbishop Pierre Christophe.

### Remarks by Bishop Burbidge

Bishop stated that he will ordain 2 Transitional Deacons to the Priesthood on June 4, 2016. At his request, Deacon Philip Johnson will be ordained to the Priesthood on January 7, 2017. The Bishop encouraged continues prayerful support for former seminarian, Tim Ahn.

Also, the Bishop has asked that prior to each meeting that the Council Chair invite all priests to submit recommended agenda items for the Council.

### ATTACHMENTS

Attachment 1 – Budget Presentation

Attachment 2 – Priest Pension Plan Funding: Analysis and Recommendation

Attachment 3 – Draft Document: *Protocols for Receiving Priests from Outside the United States for Ministry in the Diocese of Raleigh*

Council	Action	Items/Administrative	Action	Items/New
Business:				

RCIA

Update on Catholic Charities

Recommendation of Diocesan Finance Council on change of Assessments

Update on mentoring of newly appointed pastors

The meeting adjourned at 4:30 pm

## Dates for Future Scheduled Meetings:

Tuesday, October 11, 2016

Tuesday, December 6, 2016

Tuesday, March 7, 2017

Tuesday-Wednesday, May 23-24, 2017

Tuesday, October 10, 2017

Tuesday, December 5, 2017

Respectfully submitted,

Approved,

Reverend Donald M. Staib

Secretary

May 20, 2016

Most Reverend Michael F. Burbidge

Bishop of Raleigh

May 31, 2016

**STRICTLY CONFIDENTIAL**

TO: Council of Priests

FROM: Russell C. Elmayan  
Chief Financial Officer/Chief Operating Officer

SUBJECT: 2016-17 Proposed Diocesan Budget

DATE: May 4, 2016

I write to transmit a summary of the major issues related to the 2016-17 Diocesan Budget. This is the culmination of a process that included the following steps:

- A survey of all priests regarding Diocesan services.
- An initial meeting at each Deanery to discuss the purpose of the survey.
- A second meeting at each Deanery to discuss the results of the survey and to obtain a Deanery consensus response.
- Updates were provided at each one of the Council of Priests meetings over the last several months.

The 2016-17 proposed budget is balanced. I call your attention to the following key aspects of the budget:

- Operating income is assumed to be \$14.5 million and day to day operating expenses, prior to capital spending and new operating expenses, is assumed to be \$14.1 million.
- Capital Expenditures are expected to be \$170,000.
- New areas of spending are a net increase of \$229,000, identified in the section below.
- The BAA goal was increased by 2%. Cathedraticum is maintained at the current rate, but grows by 2% based upon offertory growth trends.
- Salaries are budgeted to increase by 3%, and most other expenses are budgeted to increase at approximately 1%.
- BAA overage to the Diocese, which would result from a surplus of estimated BAA pledge payments vs. goal after all rebates have been paid, will not be budgeted for 2016-17.
- As was the case last year, this budget includes several less conservative assumptions than in prior years. Depreciation expenses are not budgeted, there is not a plan in the budget to increase reserves, budgeted contingency for unexpected items remains at 1.5% of the operating budget, and increased Development related revenue assumptions balance the budget, as existing revenues are growing slower than expenses.



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- The Diocesan operating budget has \$312,000 for full or partial funding for eight priests and one religious sister serving in parishes or hospital chaplaincies across the Diocese. This includes \$139,000 of funding for the priest chaplain at Wake Medical Center, partial funding for the priest chaplain for the hospital in Greenville, and funding for a priest serving in the Cape Fear Deanery and UNC-Wilmington. If the requests to the Cape Fear, Tar River, and Raleigh Deaneries result in a favorable response to a request to fund half of those costs, this would result in approximately \$70,000 in the operating budget which could be used for other ministries, or it could be added to the contingency to provide funding for unexpected expenses.
- The Diocesan operating budget also provides, on an ongoing basis, approximately \$170,000 in subsidies to 9 small parishes so that a Catholic presence can be maintained in lesser populated areas of the Diocese.

### **REVENUES ADDED TO THE BUDGET ABOVE AND BEYOND TYPICAL INCREASES**

- a) In the 2015-16 fiscal year, \$200,000 was added to the base of the budget for assumed additional revenues, outside of the BAA, from Development initiatives, of which \$100,000 has been realized to date. In the 2016-17 fiscal year, an additional \$100,000, or a total of \$300,000, is included in the budget for additional revenues anticipated from Development initiatives.

### **EXPENSES ADDED TO THE 2016-17 BUDGET**

Key expense items added to the 2016-17 budget are as follows:

- b) As turnover occurs in positions at the Diocesan offices, those positions are often refilled at higher salary, given the status of the employment market. Based upon the hiring decisions made, salaries and related expenses for newly filled positions will be \$110,000 above what was in the budget for the previous year.
- c) A half time position will be added in the Tribunal due to increased volume stemming from the initiative by Pope Francis and by the elimination of nullity fees. The hours for the staff person assisting the Archivist will be increased. The total cost of both positions will be \$59,000.

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- d) Because the BAA has taken more months in which to meet goal in recent years, the number of BAA related mailings to parishioners has increased. In order to budget a realistic amount for to cover these costs, the budget for BAA related mailings has increased by \$50,000.
- e) Other key expense items impacting the budget are an increase in the retainer fee for Diocesan legal counsel, an increase in subsidies for a small parish and a mission, and another health care premium holiday due to favorable claims experience.

### **REORGANIZATION IN THE SECRETARIAT FOR LAY FORMATION, MARRIAGE, AND FAMILY LIFE**

In part because of the information obtained from the survey of priests, a reorganization has occurred which combine several departments – Evangelization, Catechesis, Marriage Preparation and Enrichment, Human Life and Dignity, Hispanic Ministry, African Ancestry Ministry, Youth and Young Adult Ministry, and Lay Ministry - under one umbrella in a new Secretariat. Because this reorganization is still in process, the budget has not been finalized, and it is currently represented in the previous format. A commitment has been made to have the new budget for the Secretariat not exceed the existing budgets for all of the areas mentioned above.

### **SHORT JOURNEY CENTER**

Short Journey Center will end the 2015-16 year with a sizeable deficit, as it did in the previous year. In conjunction with the less conservative budget assumptions which were implemented overall for the Diocese in 2015-16, this will likely result in a small operating deficit for the overall Diocesan operating budget.

There is a significant amount of deferred maintenance needs at the Short Journey facility. After a wind down period, a hiatus will be placed on further use of the facility while next steps are being studied.

### **2017-18 and 2018-19 FORECAST**

The initial forecast for 2017-18 and 2018-19 shows small operating deficits, as expenses are forecast to increase at a faster rate than revenues. It is not the intention to submit deficit budgets for those years. It is the expectation that the preliminary deficits will be eliminated through a combination of increased revenues and/or decreased expenses.

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### **CATHOLIC CHARITIES**

As a separate legal entity, Catholic Charities has its own budget and financial statements apart from the Diocesan budget. It has had financial challenges during 2015-16, as revenues have not grown, some grants were not received as expected, and expenses were not adequately reduced in order to maintain equilibrium. The overall deficit is expected to be \$350,000 out of an overall budget of just under \$5 million.

Beginning this month, an additional management resource will be added to Catholic Charities for a period of one year, to make the necessary recommendations and decisions to bring spending in line with the budget, to cultivate additional benefactors so that revenues for Catholic Charities can be enhanced, and to shepherd Catholic Charities through the process of taking on the management of the new multi-service center for the homeless in downtown Raleigh. (An official announcement will be forthcoming).

Because of all of these moving parts, there is not a budget in place to present at this time for Catholic Charities for 2016-17. The intent is for Catholic Charities to operate at as close to a balanced budget as possible for the coming fiscal year. Once the necessary recommendations and decisions are made, in conjunction with the Catholic Charities Board, a budget will be submitted and finalized for the 2016-17 year.

Catholic Diocese of Raleigh							
Priest Council Presentation - May, 2016							
Sources of Revenue for Allocation							
		Proposed		Proposed		Proposed	
	Budget	Budget	% Inc/	Budget	% Inc/	Budget	% Inc/
Revenue Source	2015/16	2016/17	Dec	2017/18	Dec	2018/19	Dec
Cathedraticum	\$ 4,020,000	\$ 4,101,000	2.0%	\$ 4,183,000	2.0%	\$ 4,267,000	2.0%
Bishop's Annual Appeal	6,486,000	6,619,000	2.1%	6,751,000	2.0%	6,886,000	2.0%
Endowment (including GWOC and operating)	1,133,590	956,700	-15.6%	1,004,815	5.0%	1,055,407	5.0%
Rents - Mission Valley	570,000	570,000	0.0%	570,000	0.0%	570,000	0.0%
Deposit and Loan Management Fee	400,000	400,000	0.0%	400,000	0.0%	400,000	0.0%
Departmental and Project Fees; Other Revenue	1,482,503	1,827,942	23.3%	1,828,428	0.0%	1,829,463	0.1%
Total Sources of Revenue to be Allocated	\$ 14,092,093	\$ 14,474,642	2.7%	\$ 14,737,243	1.8%	\$ 15,007,870	1.8%

Catholic Diocese of Raleigh					
Priest Council Presentation - May, 2016					
Total Annual Revenue Budget for Ministry and Administrative Areas					
		Budget	Proposed	Proposed	Proposed
		Budget	Budget	Budget	Budget
Division & Department		2015/16	2016/17	2017/18	2018/19
<b>Office of the Bishop</b>					
Office of the Bishop		399,843	402,396	409,804	417,425
Vicar for Priests		38,418	38,931	39,993	40,739
Office of Vocations		185,303	187,919	194,173	199,427
Candidates and Seminarians		1,266,637	1,297,863	1,340,151	1,375,413
Priests Council		15,500	15,650	16,077	16,377
Continuing Education and Formation of Priests		182,050	183,465	86,590	88,205
Subtotal		2,087,751	2,126,224	2,086,788	2,137,586
<b>Office of the Vicar General</b>					
Office of the Vicar General		170,655	185,638	190,703	194,260
Office of Divine Worship		283,653	241,208	247,708	252,272
Office of Sacred Music		-	59,922	61,556	62,704
Ecumenical Commission		9,466	9,697	9,962	10,148
Office of Child and Youth Protection		121,857	125,013	128,424	130,819
Office of the Permanent Diaconate		170,203	156,820	160,690	163,407
Priestly Ministry		271,925	385,230	391,621	396,109
Subtotal		1,027,759	1,163,528	1,190,664	1,209,719
<b>Office of the Judicial Vicar/Chancellor</b>					
Chancellor		109,392	119,035	122,283	124,564
Council for Religious		8,300	8,200	8,423	8,580
Tribunal		226,882	241,579	248,171	252,800
Archives		28,230	45,669	46,936	47,841
Subtotal		372,804	414,483	425,813	433,785
<b>Office of the CFO/COO</b>					
Office of the CFO/COO		260,277	553,693	568,800	579,409
Construction Coordinator		104,396	107,198	110,122	112,176
Office of Stewardship and Advancement		389,752	402,693	411,232	417,229
Bishop's Annual Appeal		331,812	437,535	449,473	457,856
Office of Business Services		739,719	503,970	517,721	527,377
Fiscal Services		557,941	541,256	554,378	563,593
Diocesan Auto Fleet		25,900	27,900	27,736	27,621
Subtotal		2,409,797	2,574,245	2,639,462	2,685,261
<b>Office of Catholic Education and Communications</b>					
Office of Catholic Formation and Education		361,758	340,916	349,942	356,277
Campus Ministry		473,640	476,061	489,577	499,472
Office of Communications		288,600	299,704	307,063	312,231
Audio-Visual Production		87,447	96,951	99,464	101,034
NC Catholic Magazine		491,402	506,198	519,736	529,243
Webmaster		42,600	42,550	43,711	44,526
Subtotal		1,745,447	1,762,380	1,809,493	1,842,783
<b>Office of Human Resources</b>					
Office of Human Resources		338,717	331,495	340,540	346,892
Computer Services		298,904	294,296	302,326	307,965
Catholic Center Building and Grounds		580,255	704,710	721,365	733,061
Data Services		295,936	245,948	252,658	257,370
Short Journey Retreat Center		314,772	316,161	318,899	320,822
Avila Retreat Center		364,036	388,130	391,954	394,639
Subtotal		2,192,620	2,280,740	2,327,742	2,360,749
<b>Secretariat for Lay Formation, Marriage and Family Life</b>					
Secretariat		-	152,421	156,579	159,499
Catholic Formation and Evangelization		180,360	101,607	104,379	106,326
Office of New Evangelization		47,329	45,951	47,204	48,084
Marriage and Family Life		130,361	135,581	137,351	138,594
Youth Ministry		207,382	358,306	361,387	363,690
Catechesis and Family Formation		141,462	114,902	118,373	121,371
Lay Ministry Formation		119,032	120,995	125,191	128,870
Office of African American Ancestry		211,769	180,073	183,509	185,969
Office of Hispanic Ministry		630,551	643,204	661,617	676,249
Office of Human Life & Dignity		254,859	254,679	260,233	264,133
Subtotal		1,923,105	2,107,719	2,155,823	2,192,785
<b>Other Departments / Capital Expenditures &amp; Long Term Reserve</b>					
Grants		1,691,206	1,625,250	1,675,244	1,714,676
Contingency		203,644	200,000	205,457	209,289
Home Mission Society		25,000	25,000	25,000	25,000
Catholic Voice North Carolina		25,000	25,073	25,757	26,237
Capital Expenditures /LT Reserve		387,960	170,000	170,000	170,000
Subtotal		2,332,810	2,045,323	2,101,458	2,145,202
<b>Totals - Operating Departments</b>		<b>14,092,093</b>	<b>14,474,642</b>	<b>14,737,243</b>	<b>15,007,870</b>
<i>Catholic Charities Subsidy (a component of Grants)</i>		<i>1,031,817</i>	<i>1,062,772</i>	<i>1,110,597</i>	<i>1,163,350</i>

### Income Statements - Total Operating Divisions

			Proposed		Proposed		Proposed	
		Budget	Budget	% Inc/Dec	Budget	%	Budget	%
		2015/16	2016/17	vs. Budget	2017/18	Inc/Dec	2018/19	Inc/Dec
<b>Revenues</b>								
	Diocesan Allocation	\$ 11,801,600	\$ 12,121,833	3%	\$ 12,342,513	2%	\$ 12,569,548	2%
	Gifts and Bequest	81,190	49,500	-39%	49,500	0%	49,500	0%
	Grants	118,000	112,000	-5%	112,000	0%	112,000	0%
	Endowment	1,007,990	830,300	-18%	871,815	5%	915,407	5%
	Rents	533,388	543,187	2%	543,187	0%	543,187	0%
	Department Fees	239,565	359,834	50%	359,834	0%	359,834	0%
	Project Fees	269,260	416,988	55%	416,988	0%	416,988	0%
	Other Revenue	41,100	41,000	0%	41,406	1%	41,406	0%
	<b>Total Revenues</b>	\$ 14,092,093	\$ 14,474,642	3%	\$ 14,737,243	2%	\$ 15,007,870	2%
<b>Expenses</b>								
	Payroll Related	\$ 6,184,833	\$ 6,658,137	8%	\$ 6,910,751	4%	\$ 7,239,008	5%
	Supplies	166,090	133,115	-20%	135,004	1%	137,369	2%
	Postage	186,572	208,546	12%	210,784	1%	214,774	2%
	Travel	364,173	382,794	5%	388,226	1%	395,033	2%
	Printing and Copying	300,120	326,576	9%	330,083	1%	336,330	2%
	Telephone & Utilities	405,920	397,095	-2%	402,723	1%	409,768	2%
	Repairs & Maintenance	347,254	331,726	-4%	336,433	1%	342,328	2%
	Project Expense	997,531	1,118,338	12%	1,108,338	-1%	1,108,338	0%
	Purchased Services	745,490	804,917	8%	813,562	1%	828,958	2%
	Communications & Advertising	155,780	177,883	14%	179,792	1%	183,196	2%
	Conference & Meetings	88,315	67,955	-23%	68,918	1%	70,127	2%
	Dues & Subscriptions	103,379	99,803	-3%	101,220	1%	102,994	2%
	Education & Training	1,102,872	1,112,753	1%	1,084,542	-3%	1,103,535	2%
	Special Projects	38,000	12,000	-68%	12,170	1%	12,383	2%
	Grants & Subsidies	2,162,456	2,085,634	-4%	2,164,167	4%	2,250,789	4%
	Property Tax	6,320	13,320	111%	13,463	1%	13,718	2%
	Depreciation	-	-	0%	-	0%	-	0%
	Building Insurance	136,484	164,800	21%	166,570	1%	169,722	2%
	Other Expenses	212,544	209,250	-2%	211,497	1%	215,500	2%
	<b>Total Operating Expenses</b>	\$ 13,704,133	\$ 14,304,642	4%	\$ 14,638,243	2%	\$ 15,133,870	3%
	Capital Expenditures	237,960	170,000		170,000		170,000	
	Long Term Reserve	150,000	-		-		-	
	<b>Total Expenses</b>	\$ 14,092,093	\$ 14,474,642		\$ 14,808,243		\$ 15,303,870	
	<b>Net Surplus (Deficit)</b>	\$ -	\$ -		\$ (71,000)		\$ (296,000)	

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statements - Bishop's Office Division								
	Budget	Proposed Budget	%	Proposed Budget	%	Proposed Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 1,614,321	\$ 1,740,824	8%	\$ 1,682,903	-3%	\$ 1,714,292	2%	
Gifts and Bequest	11,040	-	-100%	-	0%	-	0%	
Endowment	446,590	369,700	-17%	388,185	5%	407,594	5%	
Project Fees	1,200	1,200	0%	1,200	0%	1,200	0%	
Other Revenue	14,600	14,500	-1%	14,500	0%	14,500	0%	
<b>Total Revenues</b>	\$ 2,087,751	\$ 2,126,224	2%	\$ 2,086,788	-2%	\$ 2,137,586	2%	
<b>Expenses</b>								
Payroll Related	\$ 468,603	\$ 479,401	2%	\$ 453,973	-5%	\$ 475,538	5%	
Supplies	13,000	20,000	54%	20,284	1%	20,638	2%	
Postage	9,100	8,580	-6%	8,672	1%	8,837	2%	
Travel	132,943	134,840	1%	136,754	1%	139,149	2%	
Printing and Copying	3,200	3,500	9%	3,538	1%	3,605	2%	
Telephone & Utilities	15,647	16,200	4%	16,421	1%	16,698	2%	
Repairs & Maintenance	10,320	9,996	-3%	10,139	1%	10,317	2%	
Project Expense	186,975	233,625	25%	223,625	-4%	223,625	0%	
Purchased Services	39,600	37,404	-6%	37,806	1%	38,521	2%	
Communications & Advertising	3,400	3,540	4%	3,578	1%	3,646	2%	
Conference & Meetings	26,435	21,900	-17%	22,210	1%	22,599	2%	
Dues & Subscriptions	70,110	73,110	4%	74,148	1%	75,447	2%	
Education & Training	1,059,378	1,072,128	1%	1,043,340	-3%	1,061,611	2%	
Special Projects	38,000	12,000	-68%	12,170	1%	12,383	2%	
Grants & Subsidies	11,040	-	-100%	-	0%	-	0%	
Depreciation	-	-	0%	-	0%	-	0%	
Building Insurance	-	-	0%	-	0%	-	0%	
Other Expenses	-	-	0%	-	0%	-	0%	
<b>Total Expenses</b>	\$ 2,087,751	\$ 2,126,224	2%	\$ 2,066,658	-3%	\$ 2,112,614	2%	
<b>Net Surplus (Deficit)</b>	\$ -	\$ -		\$ 20,130		\$ 24,972		

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statements - Vicar General Division								
		Proposed		Proposed		Proposed		
	Budget	Budget	%	Budget	%	Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 978,759	\$ 994,528	2%	\$ 1,021,664	3%	\$ 1,040,719	2%	
Gifts and Bequest	-	-	0%	-	0%	-	0%	
Grants	-	-	0%	-	0%	-	0%	
Endowment	-	-	0%	-	0%	-	0%	
Rents	-	-	0%	-	0%	-	0%	
Department Fees	30,000	151,000	403%	151,000	0%	151,000	0%	
Project Fees	19,000	18,000	-5%	18,000	0%	18,000	0%	
<b>Total Revenues</b>	<b>\$ 1,027,759</b>	<b>\$ 1,163,528</b>	<b>13%</b>	<b>\$ 1,190,664</b>	<b>2%</b>	<b>\$ 1,209,719</b>	<b>2%</b>	
<b>Expenses</b>								
Payroll Related	\$ 726,938	\$ 852,203	17%	\$ 890,548	4%	\$ 932,845	5%	
Supplies	21,950	20,090	-8%	20,376	1%	20,733	2%	
Postage	2,710	3,100	14%	3,133	1%	3,193	2%	
Travel	34,230	52,300	53%	53,042	1%	53,973	2%	
Printing and Copying	6,200	12,350	99%	12,483	1%	12,719	2%	
Telephone & Utilities	12,680	20,010	58%	20,296	1%	20,652	2%	
Repairs & Maintenance	2,220	4,660	110%	4,726	1%	4,808	2%	
Project Expense	151,701	147,475	-3%	147,475	0%	147,475	0%	
Purchased Services	32,500	16,500	-49%	16,677	1%	16,992	2%	
Communications & Advertising	480	240	-50%	243	1%	248	2%	
Conference & Meetings	8,500	11,000	29%	11,155	1%	11,350	2%	
Dues & Subscriptions	7,100	6,800	-4%	6,897	1%	7,017	2%	
Education & Training	15,400	11,300	-27%	11,460	1%	11,662	2%	
Grants & Subsidies	-	-	0%	-	0%	-	0%	
Depreciation	-	-	0%	-	0%	-	0%	
Building Insurance	-	-	0%	-	0%	-	0%	
Other Expenses	5,150	5,500	7%	5,559	1%	5,664	2%	
<b>Total Expenses</b>	<b>\$ 1,027,759</b>	<b>\$ 1,163,528</b>	<b>13%</b>	<b>\$ 1,204,070</b>	<b>3%</b>	<b>\$ 1,249,331</b>	<b>4%</b>	
<b>Net Surplus (Deficit)</b>								
	\$ -	\$ -		\$ (13,406)		\$ (39,612)		



Catholic Diocese of Raleigh

Priest Council Presentation - May, 2016
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### Income Statement - Judicial Vicar Division

			Proposed		Proposed		Proposed	
		Budget	Budget	%	Budget	%	Budget	%
		2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec
Revenues								
	Diocesan Allocation	\$ 371,804	\$ 413,583	11%	\$ 424,868	3%	\$ 432,793	2%
	Endowment	1,000	900	-10%	945	5%	992	5%
	Department Fees	-	-	0%	-	0%	-	0%
	Project Fees	-	-	0%	-	0%	-	0%
	Total Revenues	\$ 372,804	\$ 414,483	11%	\$ 425,813	3%	\$ 433,785	2%
Expenses								
	Payroll Related	\$ 285,183	\$ 316,463	11%	\$ 330,708	5%	\$ 346,417	5%
	Supplies	10,200	13,000	27%	13,184	1%	13,415	2%
	Postage	4,450	6,450	45%	6,519	1%	6,643	2%
	Travel	12,325	13,200	7%	13,389	1%	13,624	2%
	Printing and Copying	700	1,900	171%	1,920	1%	1,957	2%
	Telephone & Utilities	8,902	9,385	5%	9,517	1%	9,683	2%
	Repairs & Maintenance	8,750	12,560	44%	12,738	1%	12,962	2%
	Project Expense	4,600	4,600	0%	4,600	0%	4,600	0%
	Purchased Services	27,150	28,600	5%	28,907	1%	29,454	2%
	Communications & Advertising	-	-	0%	-	0%	-	0%
	Conference & Meetings	8,200	5,900	-28%	5,984	1%	6,088	2%
	Dues & Subscriptions	1,370	1,300	-5%	1,318	1%	1,341	2%
	Education & Training	974	1,125	16%	1,141	1%	1,161	2%
	Depreciation	-	-	0%	-	0%	-	0%
	Other Expenses	-	-	0%	-	0%	-	0%
	Total Expenses	\$ 372,804	\$ 414,483	11%	\$ 429,925	4%	\$ 447,345	4%
	Net Surplus (Deficit)	\$ -	\$ -		\$ (4,112)		\$ (13,560)	

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statement - CFO/COO Division								
		Proposed		Proposed		Proposed		
	Budget	Budget	%	Budget	%	Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 2,225,132	\$ 2,390,315	7%	\$ 2,455,532	3%	\$ 2,501,331	2%	
Gifts and Bequest	-	-	0%	-	0%	-	0%	
Rents	4,200	4,200	0%	4,200	0%	4,200	0%	
Department Fees	180,465	179,730	0%	179,730	0%	179,730	0%	
Other Revenue	-	-	0%	-	0%	-	0%	
<b>Total Revenues</b>	<b>\$ 2,409,797</b>	<b>\$ 2,574,245</b>	<b>7%</b>	<b>\$ 2,639,462</b>	<b>3%</b>	<b>\$ 2,685,261</b>	<b>2%</b>	
<b>Expenses</b>								
Payroll Related	\$ 1,731,133	\$ 1,797,124	4%	\$ 1,877,996	5%	\$ 1,967,201	5%	
Supplies	13,250	14,200	7%	14,401	1%	14,654	2%	
Postage	40,665	52,061	28%	52,620	1%	53,615	2%	
Travel	25,000	31,375	26%	31,820	1%	32,379	2%	
Printing and Copying	7,650	60	-99%	61	2%	62	2%	
Telephone & Utilities	18,332	15,622	-15%	15,845	1%	16,123	2%	
Repairs & Maintenance	49,472	51,800	5%	52,534	1%	53,454	2%	
Project Expense	19,650	39,210	100%	39,210	0%	39,210	0%	
Purchased Services	360,400	422,700	17%	427,240	1%	435,325	2%	
Communications & Advertising	103,800	131,600	27%	133,013	1%	135,530	2%	
Conference & Meetings	21,775	7,400	-66%	7,505	1%	7,637	2%	
Dues & Subscriptions	9,750	3,643	-63%	3,695	1%	3,760	2%	
Education & Training	2,920	2,450	-16%	2,485	1%	2,528	2%	
Property Tax	-	-	0%	-	0%	-	0%	
Depreciation	-	-	0%	-	0%	-	0%	
Building Insurance	5,800	4,800	-17%	4,852	1%	4,944	2%	
Other Expenses	200	200	0%	202	1%	206	2%	
<b>Total Expenses</b>	<b>\$ 2,409,797</b>	<b>\$ 2,574,245</b>	<b>7%</b>	<b>\$ 2,663,479</b>	<b>3%</b>	<b>\$ 2,766,628</b>	<b>4%</b>	
<b>Net Surplus (Deficit)</b>								
	<b>\$ -</b>	<b>\$ -</b>		<b>\$ (24,017)</b>		<b>\$ (81,367)</b>		

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statement - Catholic Education and Communications								
		Proposed		Proposed		Proposed		
	Budget	Budget	%	Budget	%	Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 1,635,197	\$ 1,660,180	2%	\$ 1,705,477	3%	\$ 1,737,286	2%	
Endowment	28,000	28,200	1%	29,610	5%	31,091	5%	
Department Fees	10,000	10,000	0%	10,000	0%	10,000	0%	
Gifts and Bequest	30,000	30,000	0%	30,000	0%	30,000	0%	
Grants	-	-	0%	-	0%	-	0%	
Project Fees	15,750	7,500	-52%	7,500	0%	7,500	0%	
Other Revenue	26,500	26,500	0%	26,906	2%	26,906	0%	
<b>Total Revenues</b>	<b>\$ 1,745,447</b>	<b>\$ 1,762,380</b>	<b>1%</b>	<b>\$ 1,809,493</b>	<b>3%</b>	<b>\$ 1,842,783</b>	<b>2%</b>	
<b>Expenses</b>								
Payroll Related	\$ 656,329	\$ 682,336	4%	\$ 713,043	5%	\$ 746,913	5%	
Supplies	10,550	10,270	-3%	10,415	1%	10,598	2%	
Postage	116,440	125,904	8%	127,257	1%	129,665	2%	
Travel	19,035	21,775	14%	22,084	1%	22,473	2%	
Printing and Copying	275,000	300,041	9%	303,262	1%	309,001	2%	
Telephone & Utilities	9,950	11,920	20%	12,089	1%	12,301	2%	
Repairs & Maintenance	1,800	4,600	156%	4,666	1%	4,748	2%	
Project Expense	72,925	39,195	-46%	39,195	0%	39,195	0%	
Purchased Services	101,960	84,686	-17%	85,596	1%	87,217	2%	
Communications & Advertising	34,700	34,503	-1%	34,873	1%	35,533	2%	
Conference & Meetings	4,900	5,450	11%	5,527	1%	5,625	2%	
Dues & Subscriptions	6,258	7,100	13%	7,201	1%	7,328	2%	
Education & Training	1,000	-	-100%	-	0%	-	0%	
Grants & Subsidies	434,600	434,600	0%	454,157	5%	475,729	5%	
Depreciation	-	-	0%	-	0%	-	0%	
Building Insurance	-	-	0%	-	0%	-	0%	
Other Expenses	-	-	0%	-	0%	-	0%	
<b>Total Expenses</b>	<b>\$ 1,745,447</b>	<b>\$ 1,762,380</b>	<b>1%</b>	<b>\$ 1,819,365</b>	<b>3%</b>	<b>\$ 1,886,326</b>	<b>4%</b>	
<b>Net Surplus (Deficit)</b>								
	<b>\$ -</b>	<b>\$ -</b>		<b>\$ (9,872)</b>		<b>\$ (43,543)</b>		

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statement - Human Resource								
		Proposed		Proposed		Proposed		
	Budget	Budget	%	Budget	%	Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 1,649,732	\$ 1,722,649	4%	\$ 1,769,651	3%	\$ 1,802,658	2%	
Department Fees	19,100	19,104	0%	19,104	0%	19,104	0%	
Gifts and Bequest	1,800	-	-100%	-	0%	-	0%	
Other Revenue	-	-	0%	-	0%	-	0%	
Rents	521,988	538,987	3%	538,987	0%	538,987	0%	
<b>Total Revenues</b>	<b>\$ 2,192,620</b>	<b>\$ 2,280,740</b>	<b>4%</b>	<b>\$ 2,327,742</b>	<b>2%</b>	<b>\$ 2,360,749</b>	<b>1%</b>	
<b>Expenses</b>								
Payroll Related	\$ 1,137,774	\$ 1,246,283	10%	\$ 1,302,363	4%	\$ 1,364,225	5%	
Supplies	86,190	46,855	-46%	47,520	1%	48,351	2%	
Postage	8,580	7,546	-12%	7,626	1%	7,770	2%	
Travel	12,340	18,000	46%	18,256	1%	18,577	2%	
Printing and Copying	7,020	6,665	-5%	6,736	1%	6,864	2%	
Telephone & Utilities	312,839	308,650	-1%	313,030	1%	318,514	2%	
Repairs & Maintenance	265,492	245,750	-7%	249,236	1%	253,603	2%	
Project Expense	55,815	15,300	-73%	15,300	0%	15,300	0%	
Purchased Services	154,550	186,576	21%	188,580	1%	192,150	2%	
Communications & Advertising	2,900	1,000	-66%	1,010	1%	1,030	2%	
Conference & Meetings	900	7,395	722%	7,500	1%	7,632	2%	
Dues & Subscriptions	2,866	2,500	-13%	2,535	1%	2,579	2%	
Education & Training	10,000	13,900	39%	14,097	1%	14,344	2%	
Property Tax	6,320	13,320	111%	13,463	1%	13,718	2%	
Depreciation	-	-	0%	-	0%	-	0%	
Building Insurance	128,034	160,000	25%	161,718	1%	164,778	2%	
Other Expenses	1,000	1,000	0%	1,011	1%	1,030	2%	
<b>Total Expenses</b>	<b>\$ 2,192,620</b>	<b>\$ 2,280,740</b>	<b>4%</b>	<b>\$ 2,349,981</b>	<b>3%</b>	<b>\$ 2,430,465</b>	<b>3%</b>	
<b>Net Surplus (Deficit)</b>	<b>\$ -</b>	<b>\$ -</b>		<b>\$ (22,239)</b>		<b>\$ (69,716)</b>		

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statement - Secretariat for Lay Formation, Marriage and Family Life								
		Proposed		Proposed		Proposed		
	Budget	Budget	%	Budget	%	Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 1,372,345	\$ 1,428,131	4%	\$ 1,467,095	3%	\$ 1,494,459	2%	
Endowment	181,400	182,800	1%	191,940	5%	201,538	5%	
Department Fees	-	-	0%	-	0%	-	0%	
Gifts and Bequest	35,850	19,500	-46%	19,500	0%	19,500	0%	
Grants	93,000	87,000	-6%	87,000	0%	87,000	0%	
Project Fees	233,310	390,288	67%	390,288	0%	390,288	0%	
Rents	7,200	-	-100%	-	0%	-	0%	
Other Revenue	-	-	0%	-	0%	-	0%	
<b>Total Revenues</b>	<b>\$ 1,923,105</b>	<b>\$ 2,107,719</b>	<b>10%</b>	<b>\$ 2,155,823</b>	<b>2%</b>	<b>\$ 2,192,785</b>	<b>2%</b>	
<b>Expenses</b>								
Payroll Related	\$ 1,157,783	\$ 1,263,231	9%	\$ 1,320,075	4%	\$ 1,382,777	5%	
Supplies	10,900	8,700	-20%	8,824	1%	8,980	2%	
Postage	4,577	4,885	7%	4,937	1%	5,031	2%	
Travel	128,150	111,250	-13%	112,826	1%	114,802	2%	
Printing and Copying	-	800	100%	809	1%	824	2%	
Telephone & Utilities	27,550	15,300	-44%	15,517	1%	15,789	2%	
Repairs & Maintenance	9,200	2,360	-74%	2,394	1%	2,436	2%	
Project Expense	505,865	638,933	26%	638,933	0%	638,933	0%	
Purchased Services	6,450	3,700	-43%	3,740	1%	3,810	2%	
Communications & Advertising	10,500	7,000	-33%	7,075	1%	7,209	2%	
Conference & Meetings	17,605	8,910	-49%	9,037	1%	9,196	2%	
Dues & Subscriptions	4,425	5,350	21%	5,426	1%	5,522	2%	
Education & Training	13,200	11,850	-10%	12,019	1%	12,229	2%	
Grants & Subsidies	21,700	22,900	6%	23,238	1%	23,610	2%	
Depreciation	-	-	0%	-	0%	-	0%	
Building Insurance	2,650	-	-100%	-	0%	-	0%	
Other Expenses	2,550	2,550	0%	2,577	1%	2,626	2%	
<b>Total Expenses</b>	<b>\$ 1,923,105</b>	<b>\$ 2,107,719</b>	<b>10%</b>	<b>\$ 2,167,427</b>	<b>3%</b>	<b>\$ 2,233,774</b>	<b>3%</b>	
<b>Net Surplus (Deficit)</b>								
	\$ -	\$ -		\$ (11,604)		\$ (40,989)		

Catholic Diocese of Raleigh								
Priest Council Presentation - May, 2016								
Income Statement - Other Departments								
		Proposed		Proposed		Proposed		
	Budget	Budget	%	Budget	%	Budget	%	
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec	
<b>Revenues</b>								
Diocesan Allocation	\$ 1,566,350	\$ 1,601,623	2%	\$ 1,645,323	3%	\$ 1,676,010	2%	
Gifts and Bequest	2,500	-	-100%	-	0%	-	0%	
Grants	25,000	25,000	0%	25,000	0%	25,000	0%	
Endowment	351,000	248,700	-29%	261,135	5%	274,192	5%	
Other Revenue	-	-	0%	-	0%	-	0%	
<b>Total Revenues</b>	<b>\$ 1,944,850</b>	<b>\$ 1,875,323</b>	<b>-4%</b>	<b>\$ 1,931,458</b>	<b>3%</b>	<b>\$ 1,975,202</b>	<b>2%</b>	
<b>Expenses</b>								
Payroll Related	\$ 21,090	\$ 21,096	0%	\$ 22,045	4%	\$ 23,092	5%	
Grants & Subsidies	1,695,116	1,628,134	-4%	1,686,772	4%	1,751,450	4%	
Printing and Copying	350	1,260	260%	1,274	1%	1,298	2%	
Telephone & Utilities	20	8	-60%	8	0%	8	0%	
Purchased Services	22,880	24,751	8%	25,016	1%	25,489	2%	
Conference & Meetings	-	-	0%	-	0%	-	0%	
Depreciation	-	-	0%	-	0%	-	0%	
Dues & Subscriptions	1,500	-	-100%	-	0%	-	0%	
Supplies	50	-	-100%	-	0%	-	0%	
Postage	50	20	-60%	20	0%	20	0%	
Travel	150	54	-64%	55	2%	56	2%	
Other Expenses	203,644	200,000	-2%	202,148	1%	205,974	2%	
<b>Total Expenses</b>	<b>1,944,850</b>	<b>1,875,323</b>	<b>-4%</b>	<b>1,937,338</b>	<b>3%</b>	<b>2,007,387</b>	<b>4%</b>	
<b>Net Surplus (Deficit)</b>								
	<b>\$ -</b>	<b>\$ -</b>		<b>\$ (5,880)</b>		<b>\$ (32,185)</b>		

Catholic Diocese of Raleigh									
Priest Council Presentation - May, 2016									
Income Statement - Capital Expenditures / Long Term Reserve									
		Proposed		Proposed		Proposed			
	Budget	Budget	%	Budget	%	Budget	%		
	2015/16	2016/17	Inc/Dec	2017/18	Inc/Dec	2018/19	Inc/Dec		
<b>Revenues</b>									
Diocesan Allocation	\$ 387,960	\$ 170,000	-56%	\$ 170,000	0%	\$ 170,000	0%		
<b>Total Revenues</b>	\$ 387,960	\$ 170,000	-56%	\$ 170,000	0%	\$ 170,000	0%		
<b>Expenses</b>									
Capital Expenditures	\$ 237,960	\$ 170,000	-29%	\$ 170,000	0%	\$ 170,000	0%		
Long Term Reserve	150,000	-	-100%	-	0%	-	0%		
<b>Total Expenses</b>	387,960	170,000	-56%	170,000	0%	170,000	0%		
<b>Net Surplus (Deficit)</b>	\$ -	\$ -		\$ -		\$ -			

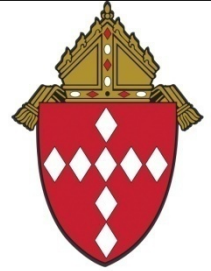
**Catholic Diocese of Raleigh**  
**Priest Council Presentation - May 2016**  
**Balance Sheet FY17 Budget**

**\$'s in Thousands**

	<b>Actual FY2013</b>	<b>Actual FY2014</b>	<b>Actual FY2015</b>	<b>Forecast FY2016</b>	<b>Budget FY2017</b>
<b>Assets</b>					
Cash	44,034	55,460	68,395	64,321	55,352
Investments	44,549	49,797	47,415	46,901	51,540
Accounts Receivable	31,233	24,678	19,825	17,825	10,725
Notes Receivable	50,023	52,594	49,400	44,051	45,051
Beneficial Interest in Perpetual Trusts	5,601	6,051	5,817	5,817	5,817
Fixed Assets	20,056	20,647	23,666	42,346	54,799
Other Assets	1,917	1,538	1,262	1,392	1,578
<b>Total Assets</b>	<b>197,413</b>	<b>210,765</b>	<b>215,780</b>	<b>222,653</b>	<b>224,862</b>
<b>Liabilities &amp; Net Assets</b>					
Long Term Debt	32,103	30,089	27,985	25,151	23,575
Parish Deposits	44,740	48,689	52,583	54,412	55,575
Obligations from Future Benefits	17,156	16,406	17,330	17,580	17,830
Custodial Endowments	12,503	13,978	14,526	14,961	14,829
Rate / Swap Liability	-	-	-	-	-
Other Liabilities	4,435	5,621	5,000	4,061	2,346
<b>Total Liabilities</b>	<b>110,937</b>	<b>114,783</b>	<b>117,424</b>	<b>116,165</b>	<b>114,155</b>
Unrestricted Net Assets	2,739	2,502	3,694	2,769	2,769
Other Unrestricted Net Assets	22,411	25,856	27,909	38,616	60,184
Temp Restricted Net Assets	53,011	58,749	58,099	56,449	39,099
Permanently Restricted Net Assets	8,316	8,875	8,655	8,655	8,655
<b>Total Net Assets</b>	<b>86,477</b>	<b>95,982</b>	<b>98,356</b>	<b>106,488</b>	<b>110,706</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>197,413</b>	<b>210,765</b>	<b>215,780</b>	<b>222,653</b>	<b>224,861</b>



# Roman Catholic Diocese of Raleigh



## 2016-2017 Budget

# Diocese of Raleigh

## 2016 – 2017 Budget Process

### **Budget Process Changes:**

- Survey of all priests regarding Diocesan services
- Initial Deanery meeting discussing purpose of the survey
- Follow-up Deanery meeting to discuss results and obtain responses
- Updates provided at each of the Council of Priests meetings



# Diocese of Raleigh

## 2016 – 2017 Budget Information and Assumptions

### Diocesan Preliminary Budget Assumptions:

**BAA Revenue** – a 2.0% increase from prior year (increase in pledges from prior year, 95% redemption rate) and 2.0% increases in FY2018 and FY2019 – **overages are not being budgeted.**

**Cathedraticum Revenue** – no change in the assessment rate, however a 2.0% increase is expected in offertory over prior year and 2.0% in FY2018 and FY2019.

**Additional Revenue** – \$300K of in new revenue from new major gift initiatives budgeted (same for FY2018 and FY2019).

**Salary Increases (Lay, Priest and Religious)** – a 3.0% increase planned for in FY2017, as well as, FY2018 and FY2019.

**Health Insurance** – no change in premium and a one month contribution holiday has been granted, similar to FY2016, so no change in health insurance. 7.5% increases in FY2017 an FY2018.

**Lay Pension** – no change in the assessment rate (9.8% of gross salaries of eligible employees).

**Seminarians** – 30 Seminarians budgeted in FY2017, (30 are budgeted in the out years as well)

**Property / Liability Insurance** – 5.0% increase over prior year (out years as well)

**Postage / Mailing Expense** – 3.0% increase over prior year (out years as well)

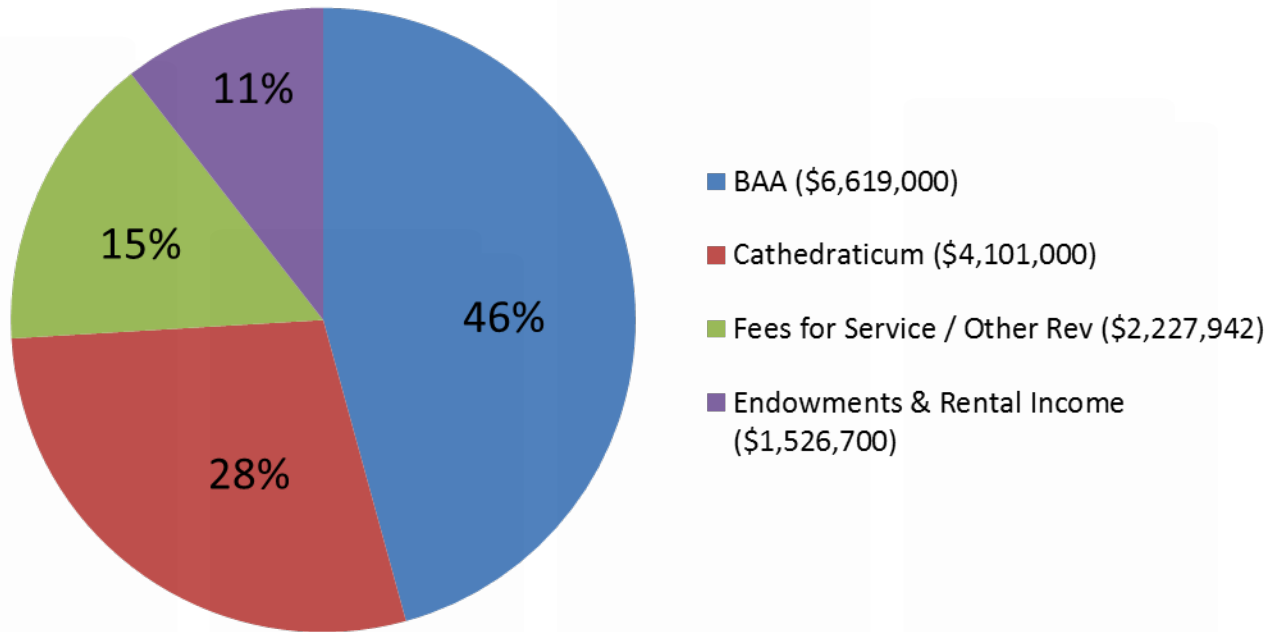
**Other Non-Personnel Expenses** – 1.0% inflation (out years as well)



# 2016-17 Diocesan Operating Budget

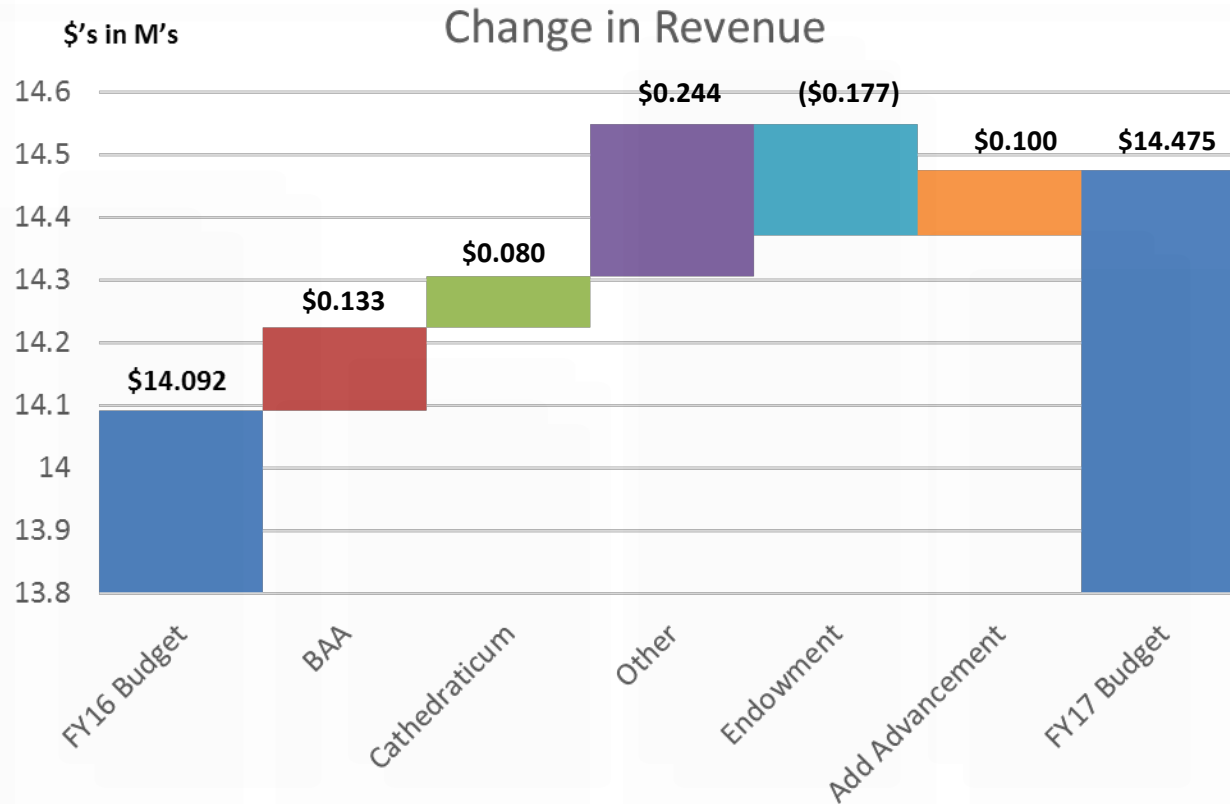
## Revenue - \$14,474,642

### Revenue



# 2016-17 Diocesan Operating Budget

## Revenue - \$14,474,642



**Revenue change of \$0.383M or 2.7% from prior year**

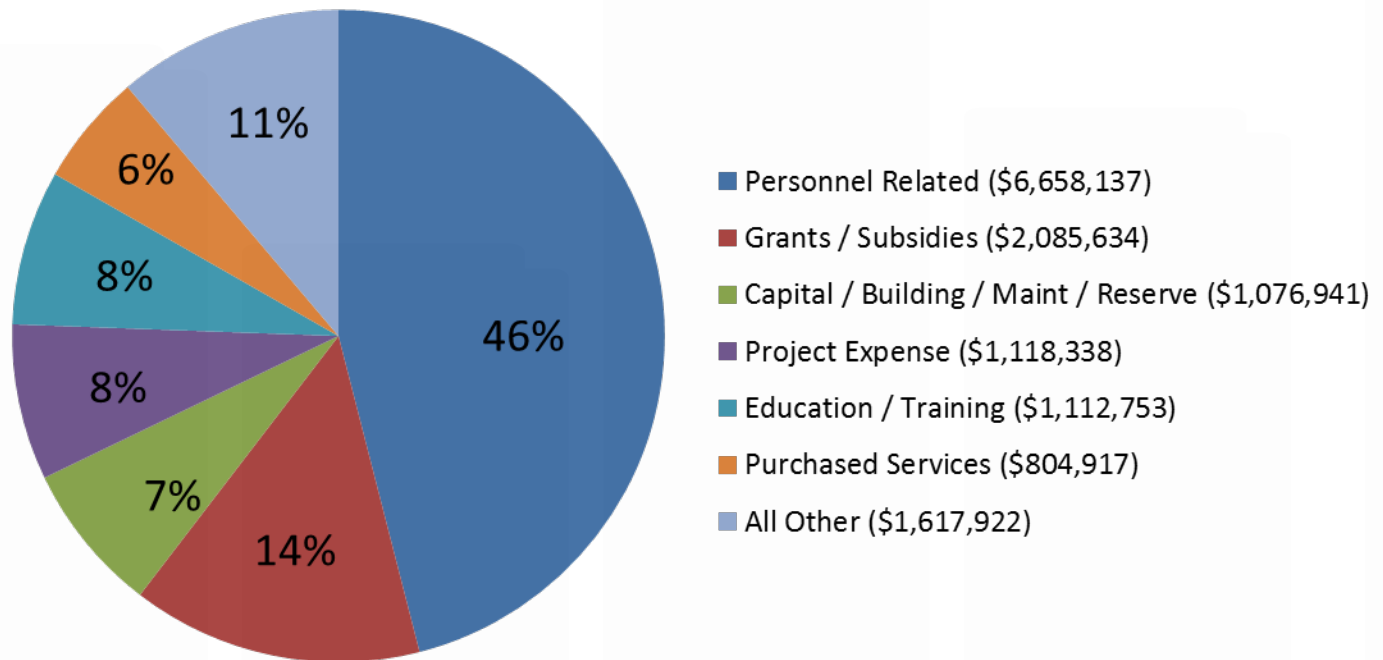
Diocese of Raleigh



# 2016-17 Diocesan Operating Budget

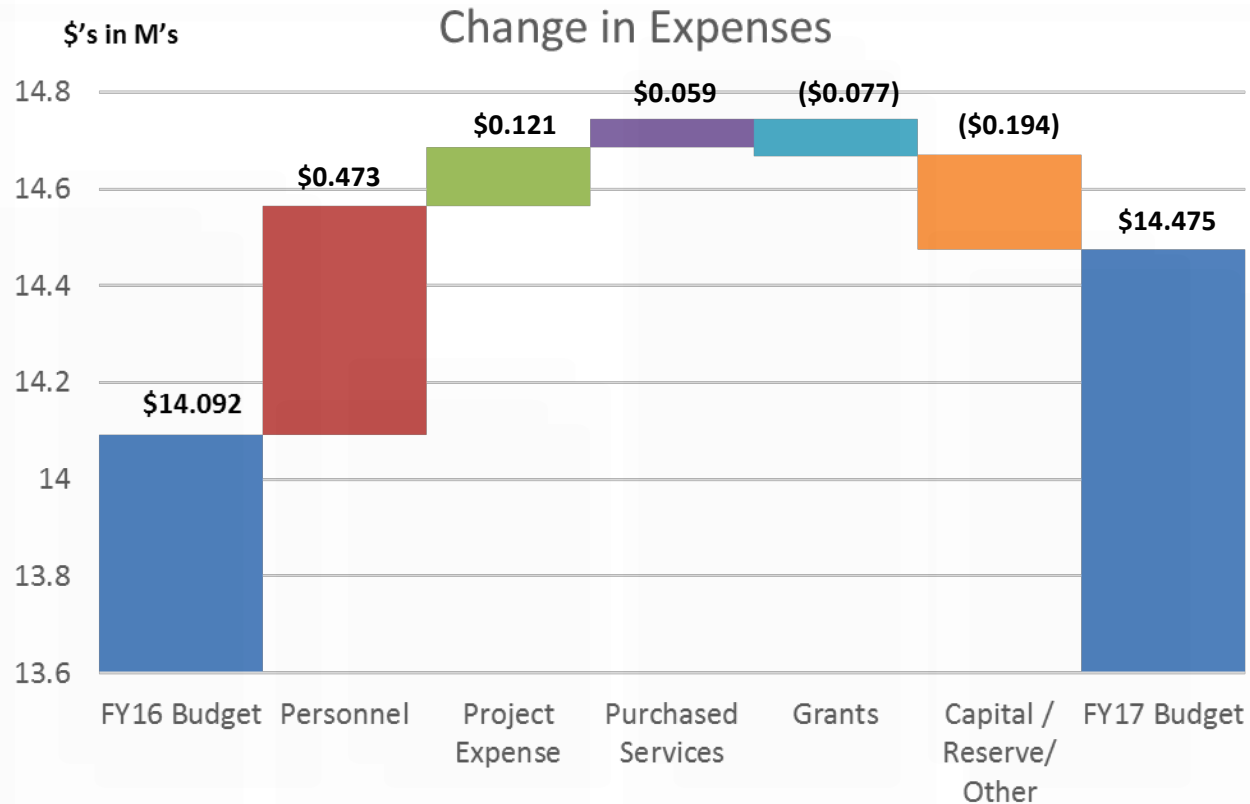
## Expenses - \$14,474,642

### Expenses



# 2016-17 Diocesan Operating Budget

## Expenses - \$14,474,642



**Expense change of \$0.383M or 2.7% from prior year**

Diocese of Raleigh



# 2016-17 Diocesan Operating Budget

## Balance Sheet

\$'s in Thousands

	Actual FY2013	Actual FY2014	Actual FY2015	Forecast FY2016	Budget FY2017
<b>Assets</b>					
Cash	44,034	55,460	68,395	64,321	55,352
Investments	44,549	49,797	47,415	46,901	51,540
Accounts Receivable	31,233	24,678	19,825	17,825	10,725
Notes Receivable	50,023	52,594	49,400	44,051	45,051
Beneficial Interest in Perpetual Trusts	5,601	6,051	5,817	5,817	5,817
Fixed Assets	20,056	20,647	23,666	42,346	54,799
Other Assets	1,917	1,538	1,262	1,392	1,578
<b>Total Assets</b>	<b>197,413</b>	<b>210,765</b>	<b>215,780</b>	<b>222,653</b>	<b>224,862</b>
<b>Liabilities &amp; Net Assets</b>					
Long Term Debt	32,103	30,089	27,985	25,151	23,575
Parish Deposits	44,740	48,689	52,583	54,412	55,575
Obligations from Future Benefits	17,156	16,406	17,330	17,580	17,830
Custodial Endowments	12,503	13,978	14,526	14,961	14,829
Rate / Swap Liability	-	-	-	-	-
Other Liabilities	4,435	5,621	5,000	4,061	2,346
<b>Total Liabilities</b>	<b>110,937</b>	<b>114,783</b>	<b>117,424</b>	<b>116,165</b>	<b>114,155</b>
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# Priest Pension Plan Funding Proposal

Council of Priests Meeting  
May 10, 2016



# Priest Pension Plan Funding Update

## Funded Status of the Priest Pension Plan Dropped to 43% in 2008/09

- Investment performance below actuarial assumptions
- Males living longer
- Early retirements
- Benefits increased
- "Welfare" related expenses

## Actions Taken to Increase the Funded Status of the Pension Plan

- 50% of unrestricted estate proceeds to the Pension Plan
- Assessment increased
- Better Investment Performance vs. Actuarial Assumptions
- Unused self insurance liability assessment reserves above a threshold amount put towards the Priest Pension Plan



# Priest Pension Plan Funding Update

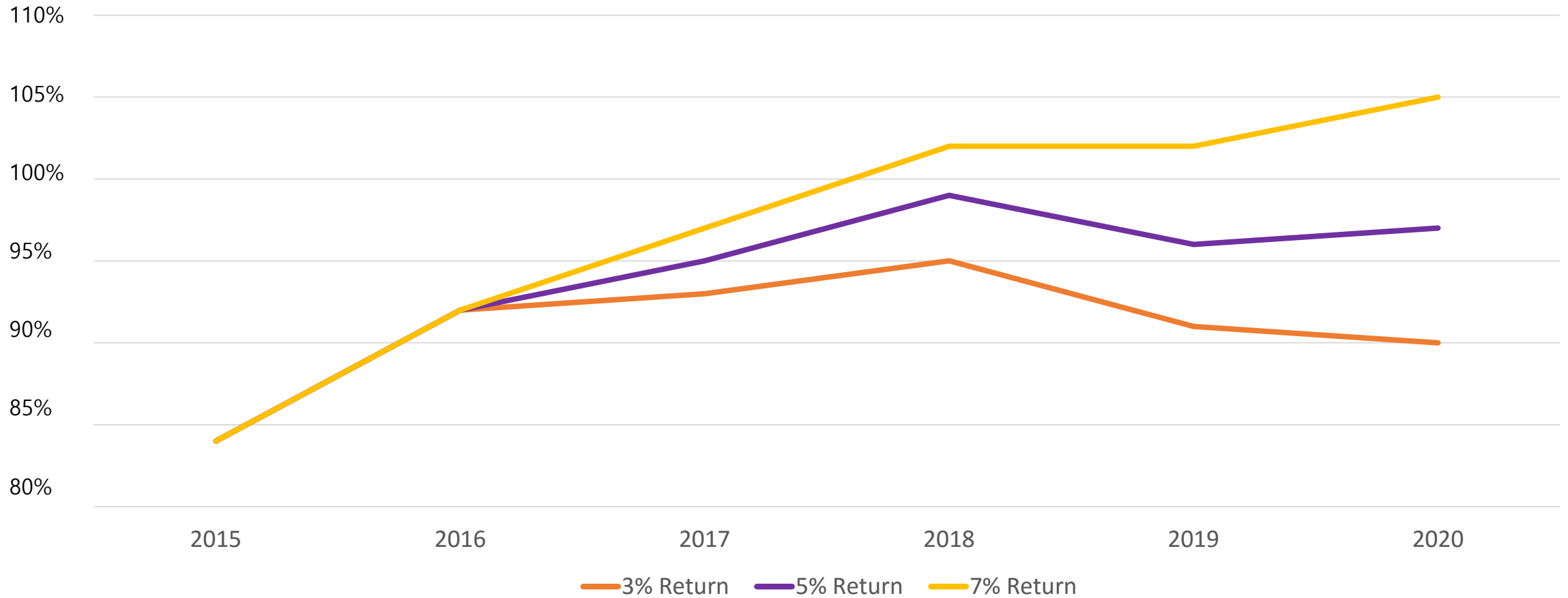
- Currently the funded status of the plan is 84%
- Even assuming a 0% investment return for 2015-16, the estimated funded status of the Plan as of July 2016 is 92% because of the expected liability insurance reserve contribution.
- Consideration to eliminate the contingent liability insurance premium for 2016-17. Reserves are at targeted levels for contingent liabilities and the priest pension plan should be above 90% funded status. This would result in a 30% reduction in property and liability insurance premiums for parishes.
- Consideration could be given to reducing the Priest Welfare and Retirement Assessment as well. This year or a future year?



# Funded Status of Priest Pension Plan

Assumes extraordinary self-insurance contributions are reduced by 50% in 2016-17 and eliminated in 2017-18 and beyond

Assumes Priest Welfare and Retirement Assessment Drops from 5.8% to 5.0% of offertory in 2016-17





## **DIOCESE OF RALEIGH**

Version: 5/10/16

### **Protocols for Receiving Priests from Outside the United States for Priestly Ministry in the Diocese of Raleigh**

#### **1. Introduction**

The purpose of this document is to provide a summary of Diocesan protocols regarding the reception of priests from outside the United States for priestly ministry in the Diocese of Raleigh. For a more comprehensive review of this topic, please see *Guidelines for Receiving Pastoral Ministers in the United States* (USCCB, 2014).

The Diocese of Raleigh reflects a genuine catholicity with faithful now with domicile throughout eastern North Carolina coming to the United States and the Diocese from countries throughout the world. This is also reflected in the interest of Diocesan extern and consecrated Religious priests from outside the United States to serve in priestly ministry in this local Church, some of whom already have connection to various cultural groups of the faithful through familial relationships or those formed in their common country or (Arch)Diocese of origin.

Relatedly, the acceptance of priests from outside the United States for priestly ministry in the Diocese of Raleigh can be a rich source of pastoral and spiritual graces for this local Church, as each of these priests not only brings with him his particular language, but also his culture and the manner in which the mission of Christ has been exercised in his country of origin.

The following protocols will address the process for inquiry and consideration for acceptance of priests from outside the United States and also speak to assimilation and formation with respect to parochial ministry and administration in the Diocese of Raleigh.

#### **2. Assessment and Acceptance**

##### **2.1 Initial Inquiry**

Priests expressing interest in exercising priestly ministry in the Diocese of Raleigh are asked to contact the Office of the Bishop or the Office of the Vicar General by letter. This letter may also be accompanied by a letter of introduction from a brother priest currently serving in priestly ministry in the Diocese of Raleigh or a family member among the faithful, who has domicile in this local Church. This letter must state that the priest making this inquiry has contacted his Diocesan Bishop or Major Superior and received permission to make the inquiry with the Diocese of Raleigh. Note that a more formal letter from the Diocesan Bishop or Major Superior of the priest will be required later in the process, as outlined below.

Also, in addition to a proven conversational ability in the English language, all priests making this inquiry must also have a conversational ability in the Spanish language, especially given the significant number of Hispanic faithful in the Diocese of Raleigh. The exception to this requirement of ability in the Spanish language is for those priest applicants for personal parishes or chapels within the Diocese of Raleigh.

## 2.2. Interview and Assessment

Following a review of the letter of inquiry, the Diocesan Bishop may direct that an interview take place. This direction is given in relation to the current or upcoming priest personnel needs within the Diocese that have been identified. The interview normally takes place by phone, but can also occur in person, if the priest is visiting family or friends within the Diocese.

The interview is scheduled and conducted by the Vicar General, along with the Priests Personnel Coordinator among the Deans and assesses spoken and written English language abilities, spoken Spanish language abilities, the ability to celebrate the sacred liturgy in English and Spanish, any need for accent reduction, a readiness and willingness to exercise priestly ministry in a new cultural environment, the capacity for collaboration with others, capacity for rectory living with other priests, independent living and driving capabilities and the ability to live in a rural area.

Upon conclusion of the interview, a written recommendation is made by the Vicar General to the Diocesan Bishop regarding the next steps, to include: 1) direction to proceed to next step in the process, 2) direction for a follow-up interview with the priest applying or 3) communication to the priest applying expressing gratitude for the inquiry, but that no appointment is possible at this time.

## 2.3. Canonical Requirements

To proceed to the next step in the process a formal Letter of Permission from the Diocesan Bishop of the priest applicant, or if he is a consecrated Religious, from his Major Superior to live outside of his community *ad experimentum*, must be sent and received by the Bishop of Raleigh. Included in this letter must be included the suitability for priestly ministry of the applicant, especially with regard to child and youth protection considerations and fidelity to Magisterium of the Church. The letter also is to state the period of time for which permission is extended for appointment to priestly ministry in the Diocese of Raleigh. A sample of this suitability letter is provided in Appendix A, both in English and Spanish.

Additionally, a copy of the degree of ordination to the Priesthood for the priest applicant must be forwarded with the Letter of Permission from the Diocesan Bishop of the priest applicant, or if he is a consecrated Religious, from his Major Superior.

## 2.4. Formal Application

Upon receipt and review of the letter of permission and statement of suitability for priestly ministry, the Diocesan Bishop may instruct the Vicar General to forward via e-mail and by regular letter, the formal application for priestly ministry in the Diocese of Raleigh to the priest applying. A sample of the application is provided in Appendix B. With this application, the following documents are required.

#### 2.4.1 Child and Youth Protection Considerations

Included in the formal application is a statement with respect to compliance with Child and Youth Protection requirements, which must be signed by the Diocesan Bishop of the priest applying or if a consecrated Religious, by his Major Superior. As Dioceses and Religious communities outside differ in their formation for maintaining a safe environment for children and young people, if the priest applying is accepted for priestly ministry in the Diocese of Raleigh, he will be required to complete the Diocese of Raleigh training for priests upon arrival in this local Church.

#### 2.4.2 Personal Health

Included in the application materials is a report on the physical health of the priest applicant from his physician.

#### 2.4.3 International Criminal Background Check

An international background check must be completed by the priest applicant, even if he has already completed this process in his country of origin. This process is completed by the priest applicant and is submitted to an independent agency contracted by the Diocese of Raleigh.

#### 2.4.4 Immigration Documentation

The priest applicant is to include a copy of his passport from his country of origin, as well as a copy of his valid, International Driver's License. The copy of the passport should also include any pages within that document which may contain documentation from a previously issued Visa(s) for travel and residence within the United States.

This documentation assists in the assessment of the immigration status of the priest applicant. This assessment is done by Diocesan Counsel. Note that the costs associated with this portion of the application are covered by the Diocese of Raleigh.

### 2.5 Initial Preparations for Priestly Ministry in the Diocese of Raleigh

- 2.5.1 Upon review of the completed formal application process and the reception of his R-1 or H1B Visa, the Vicar General recommends to the Bishop of Raleigh that the priest applicant be permitted to travel to the Diocese of Raleigh and complete the necessary documents in order to receive a Social Security number, which must be obtained prior to the appointment of the priest applicant to ministry in the Diocese of Raleigh. If the Diocesan Bishop grants permission for this travel, the following steps are to be followed.

If the priest applicant already has a valid R-1 or H1B Visa or Permanent Residency in the United States, along with a valid Social Security number, he must submit this documentation. In this case, the Vicar General recommends to the Bishop of Raleigh the appointment of the priest to priestly ministry in the Diocese of Raleigh. Steps 2.5.1.1 through 2.5.1.3 are to follow, as well as those outlined in number 3 below, with the exception of step 3.1.4.

- 2.5.1.1 Diocesan Benefits – The Vicar General forwards via electronic copy a summary of the current Diocesan benefits to include, priests' salary structure with and without a Diocesan provided car. The Vicar General states that these benefits will only commence once the Social Security Number is obtained, following the arrival of the priest in the Diocese of Raleigh.
- 2.5.1.2 Travel to the Diocese of Raleigh – The Vicar General coordinates travel dates and options for flights to the Diocese of Raleigh and communicates these to the priest for review. All travel of the priest to the Diocese is covered by the Office of the Vicar General.
- 2.5.1.3 Conference Call – The Vicar General coordinates a Conference Call with the priest to review travel arrangements to the Diocese of Raleigh and to address any additional questions prior to arrival.

### 3. Reception and Orientation

#### 3.1. Welcome and Initial Orientation

The priest is welcomed to the Diocese of Raleigh with the following protocols for initial orientation to life in the United States and priestly ministry in this local Church.

##### 3.1.1. Airport greeting, initial hospitality

The priest is greeted at Raleigh Durham International Airport (RDU) by a Diocesan staff and or representatives from the parish to which he has been appointed to priestly ministry. Depending on distance to this parish, hospitality may be arranged locally in order to complete the steps below in 3.1.2 through 3.1.3 in the days following arrival in the Diocese.

##### 3.1.2. Meeting with the Bishop of Raleigh and the Vicar General

A meeting is scheduled for the extern priest with the Bishop of Raleigh and the Vicar General, as soon as possible following his arrival to formally welcome him to the Diocese of Raleigh.

##### 3.1.3. Completion of Diocesan Benefits Paperwork

If at all possible, on the same visit to the Catholic Center for the meeting described above in 3.1.2, the priest will also meet with the Diocesan Benefits Administrator to review health insurance for priests, the coverage provided and details with respect to policy claims.

##### 3.1.4 Social Security Number and Acceptance for Priestly Ministry

The Office of the Vicar General will provide instructions to the priest on obtaining a Social Security number and coordinate a member of the parish to which he is assigned to accompany him to the local Social Security Administration office to present the documents for application.



Upon reception of a Social Security number, the Bishop of Raleigh formally accepts the priest for ministry in the Diocese of Raleigh on a provisional basis (see section 4 below). The Vicar General provides the Letter of Appointment to the priest, with faculties to exercise priestly ministry. A copy of the Letter of Appointment is provided to his Diocesan Bishop of the extern priest or if a consecrated Religious, to his Major Superior. It is only following this acceptance that the salary for priest may commence.

#### 3.1.4. Diocesan Child and Youth Protection Training

Additionally, given the priority for training in the Diocesan protocols for the protection of children and young people, a date is scheduled with the Diocesan Director for Child and Youth Protection and the priest as soon as possible upon his arrival to the Diocese of Raleigh.

#### 3.1.5. Transportation

As noted above, upon arrival to the Diocese of Raleigh, the priest is provided initial transportation, coordinated through the Office of the Vicar General. The priest is offered the use of a car from the Diocesan fleet. Note that this use results in a particular benefits structure, as stated in section 2.5.1.1 above. The use and service of this vehicle is administered through the Office of the Diocesan COO/CFO. The priest may initially use this vehicle from the Diocesan fleet and then purchase his own vehicle, resulting in a different salary structure, as stated.

#### 3.1.6. Preparation for and Obtaining a North Carolina Driver's License

A priest from outside the United States assigned in this local Church is required to have a valid International Driver's License. Upon arrival in the United States, he may legally drive for a period of three months. In this period, the priest must apply for a Social Security number. Once the priest receives his Social Security number, he may also apply for a North Carolina Driver's License. The Office of the Vicar General coordinate a member of the parish to which he is assigned to accompany him to a local NC State Driver's License Office to obtain the necessary materials for study and also to make application.

#### 3.1.7. On-going Support

A priest mentor for the priest is appointed by the Diocesan Bishop to provide pastoral support to assist the priest with his life and ministry in the new setting and culture of the Diocese of Raleigh, to include a resource to assist with accent reduction, if needed. Note the orientation processes outlined below in 3.1.9 and 3.1.10. Additionally, the priest will meet with his mentor on a monthly basis. A more complete description of the role of the mentor is provided in Appendix C.

#### 3.1.8. Administrative Orientation

The Vicar General coordinates with the Diocesan Bishop and each member of his executive staff for a series of orientation days for the priest on the following topics of review, to include: Diocesan documentation and protocols for sacramental records; parish

leadership bodies and their function; basic finances and stewardship; building and grounds and Human Resources.

Additionally, for an orientation to personal administration, the priest will be provided a review of important Diocesan calendar dates, as well as a resource to assist them with an understanding of Federal and NC State Taxes and the filing processes.

### 3.1.10 Cultural Orientation

The United States Conference of Catholic Bishops recommends the following components for a program of formation for priests from outside the United States assigned to local Churches in this country, whether Diocesan priests or consecrated Religious assigned separate from the community life of their Order, *ad experimentum* (see *Guidelines for Receiving Pastoral Ministers in the United States*, USCCB, 2014).

In summary, these components are as follows: a framework for understanding culture; cultural values of the United States; adjustment to life and priestly ministry in the United States; a review of the history of the local Church to which the priest is assigned; the approach to gender roles, leadership styles and conflict resolution; intercultural communication skills; rectory living, to include meals, self-care and attire expectations; personal foundational attitudes and flexibility in cross-cultural ministry; an understanding of faith formation in the United States; and ecumenism and interreligious relationships.

These formation components are developed through the Office of the Vicar General and may be administered either in person or via distance learning methodologies, with further possible instruction needed for the priest with regard to the latter means.

## 3.2. Orientation at Parish Assignment

### 3.2.1. Travel to Assignment

The Office of the Vicar General will coordinate with a member of the parish to which the priest is to be assigned, so that he may be accompanied to his assignment.

### 3.2.2. The Relationship with the Pastor and/or Mentor

The priest establishes a professional and fraternal relationship with his pastor, if he is appointed as a Parochial Vicar and also with the mentor which is appointed for him. As part of this relationship the following components are included.

#### 3.2.2.1. Discussion and Preparation of Memorandum of Understanding

A Memorandum of Understanding is utilized as a means to convey pastoral expectations and the structure of fraternal life to assist in the relationship between a Pastor and Parochial Vicar. This document is prepared in collaboration with the local Dean and a copy is also kept on file in the Office of the Vicar General in the file of the priest. If the priest has been appointed at Administrator of the parish, the document is prepared in the same manner.

#### 3.2.2.2. Orientation to Parish Facilities and Protocols

The priest is provided with an orientation to parish facilities and protocols by the Pastor or a member of the parish staff or member of the parish, who is designated in collaboration with the Vicar General and the local Dean.

#### 3.2.2.3. Orientation to area Hospitals, Nursing Homes and Prisons

The Pastor or the same designated staff member or parishioner also ensures that the extern priest is familiar with the area hospitals, nursing homes and prisons for which the parish is responsible. For the later, documentation is required to be completed and submitted to the State of North Carolina in order for any priest to visit the incarcerated. The Diocesan Office of Human Life and Dignity will assist in providing direction to the priest regarding this paperwork and application.

#### 3.2.2.4. Orientation to Local Stores

The Pastor or the same designated staff member or parishioner similarly ensures that the priest is familiar with the area food stores, pharmacies and receives a recommendation regarding a local bank, barber and any other needed services.

### 4. Review Processes

Following active priestly ministry of the priest in the Diocese of Raleigh for the provisional period of an interval of six to eight months, a review of his adaptability to this local Church by using the following means.

4.1. The Memorandum of Understanding – The Vicar General, in collaboration with the Pastor (if applicable), the assigned Mentor and the local Dean will review the success of the pastoral and fraternal expectations outlined in the Memorandum with respect to the priest.

4.2. Additional Points of Review – The Vicar General will also review English and Spanish language abilities of the priest, to include any improvements needed with accent reduction, his adaptation to the local culture, as well as other points of as may be appropriate, to include interviews with local parish leadership.

#### 4.3. Psychological Assessment

The Vicar General coordinates the reception by the priest of a comprehensive psychological assessment by a mental health care professional familiar with the culture and or language of the priest.

#### 4.4. Recommendation

The points of review outlined above in points 4.1 through 4.3 are summarized by the Vicar General into a recommendation of the priest for continued assignment in the Diocese of Raleigh following the provisional period of appointment. The Diocesan Bishop then conveys his decision via letter to the priest, with copy to the Vicar General and the Diocesan Bishop of the priest, or if he is a consecrated Religious, his Major Superior.

## 5. Immigration Issues

### 5.1.1. Visa Renewal

Visas may be renewed in accord with the status of the priest with the Diocese of Raleigh and the current USCIS policies. The background paperwork is kept in the personnel file of the priest in the Office of the Vicar General and monitored by the same office as well as Diocesan Counsel for Visa expiration and renewals needed. All renewals are funded by the Diocese of Raleigh.

### 5.1.2. Immigration Status Amendments

With the permission of the Diocesan Bishop of the priest, or if he is a consecrated Religious, his Major Superior, and the Bishop of Raleigh, the priest may apply for a Green Card and then Permanent Residency in the United States. Funding for both of these changes in immigration status are the responsibility of the priest.

## Appendix C

### Mentoring Program Summary for Priests from Outside the United States Assigned to Priestly Ministry in the Diocese of Raleigh

Adjustments are required of a priest assigned to the Diocese of Raleigh. An experienced priest is needed to accompany the coming to this local Church during his initial time in priestly ministry here. The mentor relationship is further defined as follows.

Considerations for Priests to serve as a Mentor: He serves successfully as a priest and pastor; can witness to standards of behavior to include dealing with conflict, balancing personal life and ministry demands; may be a priest of the same cultural background as the priest coming to the Diocese of Raleigh; is not to be the Pastor or the Director of the ministry to which the new priest is assigned. The mentor is appointed by the Bishop of Raleigh.

The Mentoring Relationship: is a priest serving in the Diocese of Raleigh who meets with the new priest on a monthly basis, developing a rapport to assist the priest in the new setting for his priestly ministry; reviews and discusses Diocesan protocols and the Memorandum of Understanding; advises the priest on the balance of priestly ministry demands and personal life and adaptation to the culture; advises the priest to become familiar with informal and unwritten policies and procedures in the local setting; assists the priest to make connections with brother priests in this local Church, as well as to connect to Diocesan offices and to staff who may be of assistance.

The priest mentor is to be available at the Administrative Orientation to meet and welcome the new priest to the Diocese of Raleigh. The Office of Vicar General provides oversight for the mentoring relationship and provides training and ongoing support. The appointment of the mentor is for one year, but may be extended as needed.

Priests assigned to the Diocese of Raleigh from outside the United States are to be open to the mentoring relationship and willing to spend time needed for its development; see the process as part of a commitment to ongoing education and priestly ministry in this local Church; and to evaluate his experiences and personal goals so as to improve his ministry to the faithful in the parish to which he is assigned.



## Appendix A

Testimonial of Suitability for Priestly Ministry in the Diocese of Raleigh

Most Reverend Michael F. Burbidge  
Bishop of Raleigh  
7200 Stonehenge Drive.  
Raleigh, NC 27613

Your Excellency,

The Reverend \_\_\_\_\_, a priest of \_\_\_\_\_ [(Arch)Diocese, Religious Institute] is seeking to exercise priestly ministry in the Diocese of Raleigh. I have carefully reviewed our personnel files and all other records we maintain and I have consulted with those who served with him in the priestly ministry to which he has been appointed under our authority. Based on these inquiries, I am able to make each of the following statements, which I now verify regarding the Reverend \_\_\_\_\_.

\_\_\_\_\_ He is a priest in good standing.

\_\_\_\_\_ He has never been suspended or otherwise canonically disciplined.

\_\_\_\_\_ No criminal charges have ever been brought against him nor does he have a criminal record.

\_\_\_\_\_ He has never behaved in such a manner as to indicate that he might engage in sexual behavior inconsistent with priestly celibacy.

\_\_\_\_\_ He has never behaved in such a way as to indicate that he might deal with minors in an inappropriate manner.

\_\_\_\_\_ He does not have a current, untreated alcohol or substance abuse problem.

\_\_\_\_\_ He does not have a current, untreated emotional or mental health problem.

\_\_\_\_\_ He has never engaged in any financial irregularities related to his priestly ministry.

\_\_\_\_\_ He has never been involved in any incident, to my knowledge, which called into question his fitness or suitability to fulfill the responsibilities and duties of his priestly ministry.

\_\_\_\_\_ He has, as mandated by the *Charter for the Protection of Children and Young People*, participated in a *VIRTUS* or *Presidium* or other approved training session on how to provide a safe environment for children and young people.

In addition to the information provided above, I state that the Reverend \_\_\_\_\_ is a man of good moral character and reputation and is qualified to serve as a priest in an effective and suitable manner. I hereby grant him permission to seek to exercise his priestly ministry in the Diocese of Raleigh for the purpose of \_\_\_\_\_ located at \_\_\_\_\_ (Parish, Retreat Center, other) in \_\_\_\_\_, NC for the period of \_\_\_\_\_. Note: should the period of priestly ministry in the Diocese of Raleigh extend beyond one month, a background check must be completed and submitted to the Office of the Vicar General and the results assessed prior to beginning any priestly ministry in the Diocese of Raleigh.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

(Bishop, Vicar General, Major Superior, Provincial)

*Affix Seal*

\_\_\_\_\_  
Date

2/08/10



## Appendix A

*Testimonio de la idoneidad para el Ministerio Sacerdotal en la Diócesis de Raleigh*

Reverendísimo Michael F. Burbidge  
 Obispo de Raleigh  
 7200 Stonehenge Drive  
 Raleigh, NC 27613

Su Excelencia:

El Reverendo \_\_\_\_\_, un sacerdote de \_\_\_\_\_  
 la (Arquidiócesis, Diócesis, Institución Religiosa) busca servir en su ministerio sacerdotal en la Diócesis de Raleigh. He revisado cuidadosamente nuestro archivo personal y otros expedientes que mantenemos, y he consultado con los que sirven junto a él en el ministerio al que fue nombrado bajo nuestra autoridad. Basado en esta información, puedo hacer cada una de las siguientes declaraciones que ahora verifico con respecto al Reverendo \_\_\_\_\_.

- \_\_\_\_\_ Es un sacerdote de buena conducta.
- \_\_\_\_\_ Él nunca ha sido suspendido o disciplinado canónicamente.
- \_\_\_\_\_ Nunca se han puesto cargos criminales en contra de él como tampoco existe un record criminal.
- \_\_\_\_\_ Él nunca se ha comportado de tal manera que indique que podría involucrarse en un comportamiento sexual inconsecuente con el celibato sacerdotal.
- \_\_\_\_\_ Él nunca se ha comportado en una manera que indique que el trato con menores de edad sea de forma inapropiada.
- \_\_\_\_\_ Él en la actualidad no está bajo ningún tratamiento con problemas de abuso de alcohol o sustancias.
- \_\_\_\_\_ Él en la actualidad no está bajo ningún tratamiento con problemas de salud emocional o mental.
- \_\_\_\_\_ Nunca ha estado implicado en ninguna irregularidad financiera relacionada a su ministerio sacerdotal.
- \_\_\_\_\_ Él nunca ha estado implicado en un incidente, según mi conocimiento, que cuestione su capacidad o idoneidad para cumplir con las responsabilidades y funciones de su ministerio sacerdotal.
- \_\_\_\_\_ Él ha participado en el programa de VIRTUS o Presídium o en otras sesiones de entrenamiento apropiado para proveer un ambiente seguro a los niños y adolescentes, como lo establecen los Procedimientos del Programa para la Protección de Niños y Adolescentes.

Además de los informes proporcionados arriba, yo declaro que el Reverendo \_\_\_\_\_ es un hombre con buen carácter moral, buena reputación y competente para servir como sacerdote de manera eficaz y apropiada. Yo por este medio, le concedo el permiso para servir como sacerdote en la Diócesis de Raleigh para el propósito de \_\_\_\_\_ en \_\_\_\_\_  
 (Parroquia, Centro de Retiro, otro) en \_\_\_\_\_, NC por un período de \_\_\_\_\_.

Nota: Si se llega a extender el período del ministerio en la Diócesis de Raleigh más de un mes, se debe completar la verificación de antecedentes y deber ser enviada por el sacerdote a la Oficina del Vicario General y los resultados evaluados antes de comenzar cualquier ministerio como sacerdote en la Diócesis de Raleigh.

\_\_\_\_\_  
Firma

Sello

\_\_\_\_\_  
Nombre ( letra de imprenta)

\_\_\_\_\_  
Título  
(Obispo, Vicario General, Superior Mayor, Provincial)

\_\_\_\_\_  
Fecha



## Appendix B

OFFICE USE

EAppsDB User ID \_\_\_\_\_

Password \_\_\_\_\_

***Diocese of Raleigh Priest Request  
for Criminal Background Check***

Name: \_\_\_\_\_  
                     First                                      Middle                                      Last

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_  
                                     City                                      State                                      Zip

Phone number where you can be contacted \_\_\_\_\_

How long have you lived at the address above: months \_\_\_\_\_ years \_\_\_\_\_

Please list states (other than the one above) in which you have lived during the past 7 years.

\_\_\_\_\_

Your Social Security Number (SSN): \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

If you do not have a SSN, what is your ITIN Number \_\_\_\_\_

(What is an ITIN? An Individual Taxpayer Identification Number (ITIN) is a tax processing number issued by the Internal Revenue Service for those who are not eligible to obtain a Social Security Number.)

Date of Birth: Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

Date of Ordination: Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

Drivers license number \_\_\_\_\_ State \_\_\_\_\_

I hereby acknowledge that I have been notified that the Catholic Diocese of Raleigh will request a criminal background check about me now and in the future on a periodic basis.

By my signature below, I authorize the Catholic Diocese of Raleigh to request and obtain a criminal background check about me now and in the future on a periodic basis.

Applicant Signature \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

If you have lived outside of the United States for 28 consecutive days or more, please check this box ☐ and complete the attached form entitled International Background Check Request.

**Do not complete this form unless you have lived outside the United States.**

## INTERNATIONAL BACKGROUND CHECK REQUEST

If you have lived outside the country for 28 consecutive days, please complete the following.

List the countries in which you have lived: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Please list your Mother's maiden name. \_\_\_\_\_

**Please attach a photocopy your driver's license, your passport and your social security card.**

**Residential History- Please list all addresses that served as your residence for the past 10 years.**  
 Please attach another sheet if more space is needed.

Dates	Street Address	City/State/Zip	Country
Beginning Date _____ Month / Year Ending Date _____ Month / Year			
Beginning Date _____ Month / Year Ending Date _____ Month / Year			
Beginning Date _____ Month / Year Ending Date _____ Month / Year			
Beginning Date _____ Month / Year Ending Date _____ Month / Year			

In connection with my application for employment and at any time during any subsequent employment with Diocese of Raleigh, (including contract for services), I understand that consumer reports which may contain public record information may be requested from Intercoastal Research and Investigations, PO Box 1133, Little River, SC 29566-1133. These reports may include the following types of information: names and dates of previous employers, reason for termination of employment; work experience; educational experience, accidents, drugs/alcohol use. I further understand that such reports may contain public record information concerning my driving record, workers' compensation, credit, bankruptcy proceedings, criminal records, etc., from federal, state and other public or private entities which maintain such records.

*I authorized, without reservation, any party or agency contacted by Intercoastal Research and investigations to furnish the above-mentioned information.*

***(Please complete the back of this page)***

I have the right to make a request to Intercoastal Research and Investigations, upon proper identification, to request the nature and substance of all information in its files on me at the time of my request, including the sources of information; and the recipients of any reports on me which Intercoastal Research and Investigations has previously furnished within the two-year period preceding my request. I hereby consent to your obtaining the above information from Intercoastal Research and Investigations.

I hereby authorize procurement of consumer report(s). If hired (or contracted), this authorization shall remain on file and shall serve as ongoing authorization for you to procure consumer reports at any time during my employment (or contract) period. A facsimile of this document shall be considered as valid as the original.

Print Name\_\_\_\_\_

Signature\_\_\_\_\_ date\_\_\_\_\_

Please attach a **photocopy** your driver's license, your passport and your social security card .

## **Code of Conduct for Church Personnel for the Diocese of Raleigh<sup>1</sup>**

### **SECTION ONE: Preamble**

- 1.1 By virtue of our baptism, all Catholics share in the mission of the Church to continue the work of Jesus Christ. Jesus is Lord and we must seek the Kingdom as He did. We must preach the Good News that there is a God who loves us beyond our imagining. We must give our love and the provisions of life to those who have them in small measure. By our actions we must share our conviction that everything that occurs between us is a function of our relationship with God.
- 1.2 The call to discipleship is abundant in grace. It is also an awesome responsibility. We who represent the Church, the bishop, priests, deacons, seminarians, non-ordained religious, lay employees and lay volunteers who are involved in work for the Diocese of Raleigh, its parishes and agencies and who represent the Church by virtue of office, designated position, employment or contract (hereafter called Church Personnel) have a special obligation due to roles of leadership and positions of trust. Our brothers and sisters, young and old, invite us into their lives, open their hearts, share their joys and hopes, their grief and anxieties with us. They are confident that we will listen compassionately and act honorably in their best interest. Our behavior as Church Personnel, both public and private, has the potential to inspire those entrusted to our pastoral care to faith and hope and to motivate them toward greater generosity and participation in a life of faith. Sadly, when trust is abused it also has the potential to weaken or destroy faith, and cause scandal.
- 1.3 It is essential that Church Personnel be constantly mindful of the trust given to them. Faithfully discharging the responsibilities that accompany our work requires constant prayerful reflection and must be sustained and supported by God's grace. Our obligations require each of us to act with love and prudence. This Code of Conduct will assist in this task.
- 1.4 These statements do not presume to provide answers to all ethical questions. They present a set of general standards to help guide day to day actions and form a framework for developing policies and discussing ethical questions. Church Personnel in the Diocese of Raleigh agree to abide by this Code of Conduct and understand that disregarding these principles through personal conduct or life style contrary to the moral and religious doctrines or teachings of the Roman Catholic Church may lead to corrective and/or disciplinary action.

### **SECTION 2: Principles**

- 2.1 Church personnel of the Diocese of Raleigh shall:
  - a. Respect the teachings and precepts of the Catholic Church

- b. Respect the rights, dignity and worth of each person from conception to natural death.
- c. Conduct their relationships with others free of deception, manipulation, exploitation or intimidation.
- d. Work to ensure just treatment for colleagues, employees, volunteers, parishioners and others with whom they interact.
- e. Seek to provide an environment that is non-discriminatory, free from all forms of abuse and promotes respect, self control and personal safety.
- f. While under our supervision to protect, to the best of our ability those entrusted to our care, especially children and youth as well as adults who are physically or mentally challenged.
- g. Provide guidance for individuals or groups in a way that protects and respects each person, and is free from deception, manipulation, exploitation or intimidation.
- h. Keep all information received in the course of formal counseling or spiritual direction in the strictest confidence in accord with professional ethical codes and as mandated by canon and civil law.
- i. Make no false accusations against another or reveal the faults and failings of another to those who have no right to know.
- j. Be responsible stewards of the human, temporal, and financial resources of the Church.
- k. Maintain a high level of competence in our designated role in the Church and prudently attend to our physical, spiritual, mental and emotional well-being.
- l. Avoid accepting or conferring an office, position, assignment or compensation that creates a conflict of interest or the perception of impropriety.
- m. Examine our own actions and intentions objectively to ensure that our behavior promotes the welfare of the community and exemplifies the strong moral tradition of the Church.
- n. Promptly report incidents of ethical misconduct by other Church Personnel to the proper Church and/or civil authority
- o. Church personnel are prohibited from speaking in a manner that is derogatory or demeaning. All are expected to refrain from swearing or using foul language.

- p. Church personnel are prohibited from possessing or viewing child pornography as is consistent with North Carolina State Law. Church personnel are prohibited from possessing or allowing a person to view pornography or any sexually explicit or morally inappropriate materials on Church property, at Church sponsored events, or in the presence of minors. Such materials include, but are not limited to: magazines, videos, films, recordings, computer software, computer games, or printed materials. In addition, topics of conversation or discussion, vocabulary or any other form of personal interaction or entertainment that could not be used in the presence of parents or a responsible adult are also prohibited.
- q. Church personnel are to refrain from sexually offensive humor and conversation.

2.2 In addition to these guidelines church personnel shall abide by any applicable professional codes of conduct, ethical norms, canon or civil laws.

### **SECTION 3: Behavioral Guidelines for Church Personnel Working with Minors**

- 3.1 The following guidelines are intended to assist Church Personnel in making decisions about interactions with minors in Church sponsored and affiliated programs. They are not intended to address every possible situation or designed to address interactions within families. For clarification of any guideline or to inquire about a behavior not addressed here, please contact your pastor, agency director, principal or the Director for the Program for the Protection of Children and Young People.
- a. Corporal punishment is prohibited when disciplining minors. Physical force may only be used to restrain individuals from inflicting harm on themselves and/or others.
  - b. Church Personnel are prohibited from engaging in sexually oriented conversations with minors except in the context of sharing the Church's teaching on human sexuality. Church personnel are never permitted to use examples from their own sexual history or experience.
  - c. Church Personnel are prohibited from using tobacco products in the presence of minors or having in their possession or being under the influence of any alcoholic beverage or any illegal drugs when working with minors. Church Personnel are prohibited from providing minors with any alcoholic beverage, tobacco, drugs or any substance prohibited by law.
  - d. Medications may be administered to minors only with written parental permission. Parents should provide the medication clearly labeled (prescriptions or over-the counter medications) and dosing instructions for the medication.
  - e. Church Personnel should schedule one-on-one guidance sessions or meetings with minors at times and locations that promote accountability and meet accepted standards of propriety. This includes limiting the length and

the number of meetings, making referrals and notifying the parents and/or guardians as appropriate. Church Personnel providing counseling services should follow the standards of care and code of ethics for their respective professions in terms of services to minors and notification of parents and/or guardians.

- f. Adults should avoid being alone with a minor so as to remove the opportunity for, or perception of impropriety. Church Personnel are prohibited from sleeping in the same bed, hotel room, van, sleeping bag or tent with a minor unless the adult is a parent, guardian or sibling of the minor. Church personnel should not take an overnight trip alone with a minor who is not an immediate family member. Church Personnel should avoid being alone with a minor (not a member of the family) in a locker room, rest room, dressing facility, car or vehicle or other isolated area that is not appropriate to a ministerial relationship. When the good of the minor requires that they be accompanied by an adult to any of these locations, the time alone with the minor should be minimal and another adult should be made aware of the circumstances. As a general rule, changing and showering facilities should be separate for male and female and facilities and arrangements for minors separate from adults or should be used by adults and minors at different times.

NOTE: When there is only one large room that serves as the sleeping area for each gender, at least two adult leaders should be present in each sleeping area.

- g. Church Personnel, acting in their ministerial role, should not host minors who are not family members for overnight accommodations where there is no other adult supervision present. This includes, but is 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.
- h. Clergy should not allow minors who are not members of their family to stay overnight in their private accommodations or residence unless accompanied by other adults.
- i. Appropriate demonstrations of affection between Church Personnel and minors can be important for a child's development and a positive part of ministry. Touching must be age appropriate and based on the need of the minor not the adult. If an adult has questions regarding demonstrating affection toward a minor they should discuss the matter with their supervisor or an adult qualified to render an opinion about appropriate ministerial boundaries.

### 3.2 Church Personnel may be in a position to provide transportation for minors.

The following guidelines apply:

- a. Ordinarily minors should not be transported without written permission.
- b. Minors should be transported directly to their destination with no unauthorized stops.
- c. Drivers must be validly licensed and insured.

- d. Drivers may not drive a diocesan vehicle without prior authorization.
  - e. Drivers are to abide by all applicable state laws (including safety seats /belts) and diocesan policies regarding the safe transportation of children and youth.
- 3.3 Church Personnel observing anyone (adult or minor) abusing a minor, must take immediate steps to intervene to provide a safe environment for the minor and report the misconduct in accord with diocesan policies and civil law. **Church personnel who have cause to suspect that a minor has been abused must report the suspected abuse in accord with the Diocese of Raleigh Policies and Procedures for the Protection of Children and Young People and civil law.**

#### **SECTION 4: Guidelines for the Supervision of Minors**

Guidelines include, but are not limited to, the following:

- 4.1 Church personnel are responsible for releasing minors in their care at the close of activities only to parents, legal guardians or other persons designated by parents or legal guardians in writing. Special circumstances for the release of children require written parental/guardian permission.
- 4.2 Programs for minors should be administered by at least two adult supervisors.
- 4.3 Church personnel should report uncontrollable, dangerous, or unusual behavior of minors to parents /guardians as soon as possible.
- 4.4 Church personnel are to report substance abuse by minors to parent/guardian as soon as possible.
- 4.5 As far as possible, facilities should be monitored during church services, and during all other (school and parish) activities on the church/school grounds.
- 4.6 Parents should be encouraged to be part of all services and programs in which their children and young people are involved.
- 4.7 Parental permission should be obtained, including a signed medical treatment authorization form before taking minors on trips.
- 4.8. Parental approval must always be obtained before permitting any minor to participate in athletic or other activities.

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<sup>1</sup> Formerly the “Code of Professional Responsibility”



## DECLARATION

My Signature represents the following:

- That I have read and understand the "Code of Conduct for Church Personnel for the Diocese of Raleigh;"
- That I agree to observe the Code of "Conduct for Church Personnel for the Diocese of Raleigh."

---

Signature

---

Date

## Declarations

The Catholic Diocese of Raleigh appreciates your willingness to share your faith, gifts and skills. Providing safe and secure programs for our members is of utmost importance to us. The information gathered in this application is designed to help us provide the highest quality Catholic programs for the people of our community. Please read and initial each of the statements below.

- \_\_\_\_\_ I declare that all statements contained in this application are true and that any misrepresentation or omission is cause for rejection of my application or dismissal from my position.
- \_\_\_\_\_ I agree to observe all of the Catholic Diocese of Raleigh guidelines and policies for the program in which I am applying, especially the Code of Conduct for Church Personnel for the Diocese of Raleigh.
- \_\_\_\_\_ I understand that the Catholic Diocese of Raleigh has a ZERO TOLERANCE FOR ABUSE and takes all allegations of abuse seriously. I further understand that the Catholic Diocese of Raleigh cooperates fully with the authorities to investigate all cases of alleged abuse. Abuse of minors or vulnerable adults is grounds for immediate dismissal and possible criminal charges.
- \_\_\_\_\_ I understand that I can withdraw from the application process at any time.
- \_\_\_\_\_ I understand and agree that false statements and/or omissions regarding past conduct and/or present situations may be grounds for denial of the application to provide employment and/or volunteer services.
- \_\_\_\_\_ I hereby authorize the Catholic Diocese of Raleigh to conduct a personal and professional background check for the purposes of my application at the Catholic Diocese of Raleigh. The Catholic Diocese of Raleigh may contact any references, past and current employers, church, youth organizations, agencies where volunteer service has been completed, and any individual or organization which might be relevant to my desired position. I hereby release all of the above stated persons from any and all liability for damages that might occur during the Catholic Diocese of Raleigh's contact with the individuals for purposes of employment or volunteer services. I understand and agree that information may be obtained from sources that I provided above and that this information will be held confidentially by the Catholic Diocese of Raleigh. I have also read and understood the above stated information within this release and am signing below of my own free will.
- \_\_\_\_\_ I hereby acknowledge that I have been notified in a separate writing that the Catholic Diocese of Raleigh may request a Consumer Report about me. I understand that the Consumer Report may contain information bearing on my credit worthiness, credit standing, credit capacity, character, general reputation, personal characteristics, or mode of living. I understand that the Consumer Report may contain public record information such as consumer credit reports, criminal records, judgments, liens, driving records, educational history, prior employment history, or other public record information. I further understand that information may be requested from various Federal, State, local and other agencies that reflects my past activities.
- \_\_\_\_\_ By my signature below, I authorize the Catholic Diocese of Raleigh to request and obtain a Consumer Report containing, without limitation, the above-described information in connection with my application. I also authorize, without reservation, any person, agency, or other entity contacted by or on behalf of the Catholic Diocese of Raleigh to furnish the above described or similar information. Also by my signature below, I waive any and all causes of action that I may have against the Catholic Diocese of Raleigh or any person, agency, or other entity providing information for inclusion in the Consumer Report for libel, slander, defamation, intentional or negligent infliction of emotional distress, or for any other injury of any kind or nature caused by the gathering or supplying of the above described or similar information.
- \_\_\_\_\_ I understand that a criminal background check will be conducted prior to and may be conducted during my service. I authorize investigations of all statements contained in the application.
- \_\_\_\_\_ My signature indicates that I have read and understand the above. Do not sign until you have read and Initialed the above statements.

Applicant Signature \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

## Appendix C

### Mentoring Program Summary for Priests from Outside the United States Assigned to Priestly Ministry in the Diocese of Raleigh

Adjustments are required of a priest assigned to the Diocese of Raleigh. An experienced priest is needed to accompany the coming to this local Church during his initial time in priestly ministry here. The mentor relationship is further defined as follows.

Considerations for Priests to serve as a Mentor: He serves successfully as a priest and pastor; can witness to standards of behavior to include dealing with conflict, balancing personal life and ministry demands; may be a priest of the same cultural background as the priest coming to the Diocese of Raleigh; is not to be the Pastor or the Director of the ministry to which the new priest is assigned. The mentor is appointed by the Bishop of Raleigh.

The Mentoring Relationship: is a priest serving in the Diocese of Raleigh who meets with the new priest on a monthly basis, developing a rapport to assist the priest in the new setting for his priestly ministry; reviews and discusses Diocesan protocols and the Memorandum of Understanding; advises the priest on the balance of priestly ministry demands and personal life and adaptation to the culture; advises the priest to become familiar with informal and unwritten policies and procedures in the local setting; assists the priest to make connections with brother priests in this local Church, as well as to connect to Diocesan offices and to staff who may be of assistance.

The priest mentor is to be available at the Administrative Orientation to meet and welcome the new priest to the Diocese of Raleigh. The Office of Vicar General provides oversight for the mentoring relationship and provides training and ongoing support. The appointment of the mentor is for one year, but may be extended as needed.

Priests assigned to the Diocese of Raleigh from outside the United States are to be open to the mentoring relationship and willing to spend time needed for its development; see the process as part of a commitment to ongoing education and priestly ministry in this local Church; and to evaluate his experiences and personal goals so as to improve his ministry to the faithful in the parish to which he is assigned.