

Quintessentials

Top 5 insights for ministry from our team in the field



Catholic Leadership
INSTITUTE

5 Principles for Streamlining Pastor Transitions

The assignment of a new pastor is a major change for any Catholic parish – impacting parishioners, the outgoing priest, the incoming one, and the diocese as a whole. Supporting this change with a mindful, prayerful, detailed process benefits all involved. A variety of people have a distinct role to play in helping this transition be a positive experience for the people and their shepherd.

Catholic Leadership Institute (CLI) has gained valuable experience in supporting incoming pastors and assisting outgoing pastors prepare for the transition, so that both can best meet the pastoral needs of the parish community. Though the *Next Generation Parish* experience, Catholic Leadership Institute has helped parishes facing a pastor transition to continue their progress and maintain momentum in building up their parish community.

Rooted in this work, and with input from a few close partners, CLI developed five best practices for dioceses, parish leadership, and outgoing and incoming pastors to consider when facing this increasingly common situation.

1. Pave the Way - Outgoing Pastor and Staff

Clear information sharing is imperative. Whether the parish itself is small or large, the ins and outs of the parish administration can be a daunting task for the incoming pastor to learn. The outgoing pastor, with the help of his parish staff, should document the following types of information to share with the incoming pastor in order to help make the transition as seamless as possible:

- **Basic parish information** - number of households, Mass schedule, etc.
- **Parish financial information** - including bank accounts, logins, and financial statements.
- **Personnel** – job descriptions, policies, etc.
- **Property** - including details on the buildings, grounds, and vehicles, keys/access cards.
- **Purchasing** – details on how the liturgical items and parish supplies are purchased.
- **Services** – contracts, repairs, and service providers.

Of course, the best approach is for the parish to maintain these important pieces of information on an ongoing basis. Annual reviews and updates to key documents will ensure that if and when a transition happens, especially if it is unexpected, the community can focus on the relationships first and the paperwork second.



APPENDIX I

Pastor Transition
Planning
Documentation
& Checklist

2. Lay the Groundwork - Outgoing and Incoming Pastors

To help orient the new pastor, the outgoing pastor should share with him a sense of the history of the parish. Where have they been and where are they today? Where are they going? What are the parish's big projects and priorities? What are the most active or vibrant ministries, who are the most influential lay leaders (for better or worse)?

☐ Meet and Review

- Immediately following the announcement, the incoming and outgoing pastors should meet and review the information covered in the previous step as well as other helpful data, like the Disciple Maker Index survey results and other relevant feedback that has been gathered recently.

☐ Pastoral Plan - Listening and Sharing

- If the parish has a formal pastoral plan, such as one generated through CLI's *Next Generation Parish* process, go over it with the new pastor so he has a sense of the parish direction, the work that went into the plan, those leaders who have been and are most invested in it, and the rationale behind its strategic priorities. The new pastor should listen carefully to the voice of his predecessor and people. An existing plan can be a great blessing to a new pastor. It allows him to learn what's important in the community and it removes the pressure to set a direction right away. Before changing anything significant in the first year, a new pastor should explore "the why" behind it, especially if it aligns to a pastoral plan, and engage in dialogue with those leaders most invested to ensure he's not missing something important to the community.

☐ Let the new pastor know about the key people in the parish that he can count on, as well as other key influencers and both formal and informal leaders.

- Share information about unusual or sensitive issues – both positive and negative – to help him avoid unforced errors.

☐ The outgoing pastor should work to hand off the trust that he has built up with his parishioners to the new pastor.

- Explicitly introduce and endorse the new pastor – from the pulpit, in the bulletin, through social media, in parish ministry meetings, and in personal interactions. This will go a long way in helping him be accepted and welcomed.



DID YOU KNOW?



Creating a Pastoral Plan is part of the *Next Generation Parish* service. In 2024, Catholic Leadership Institute published a case study on how pastoral plans can ease pastor transitions.

Scan the QR code below to learn more about how pastoral plans have impacted the lives of priests across the country.





- ☐ **Advise the new pastor about the current liturgical practices of the congregation.**
 - The new pastor will understandably want to celebrate the mass according to his style. It's very helpful to understand how the community is used to celebrating. This will allow the new pastor to be more intentional about communicating any changes he hopes to make before surprising the people and causing any unnecessary friction.
 - Are the mass parts sung or recited by the celebrant? Do most priests and deacons preach from the pulpit or among the people? What are altar servers used to?
 - What does music ministry look like?
 - Are there any specific nuances for the daily mass community?
 - Does the pastor greet people before and after the masses (note: this is a tip that seems to be a small gesture but with great impact according to our research)

3. Installation and Welcome - Diocesan Leadership and Parish Community

When a new pastor is appointed to a parish, he should be welcomed through a series of planned events that align with the culture of the parish. This intentionality can help the congregation process and accept the change in pastor.

- ☐ **The new pastor can be publicly installed through a formal liturgical rite from the Book of Blessings – Rite of Installation of a Pastor.**
 - If possible, the installation and commissioning should take place at one of the Masses on the first Sunday that his appointment is effective. This would typically take place after the Gospel.
 - The order of installation includes:
 - Presentation of the pastor-elect to the parish by the appropriate dean, vicar or bishop
 - Welcome by the people of the parish.
 - Homily
 - Formal presentations of other parish clergy, parish staff, and parish council
 - Profession of Faith and Oath
 - General Intercessions
- ☐ **Host social events and share public messages of welcome to the new pastor in parish communications.**
 - Consider having a social event following the installation, such as coffee and donuts, to recognize this moment of transition and look forward to new beginnings.
 - Parish lay leaders should look for any opportunity to dedicate time at meetings, social events, and gatherings to welcoming the new pastor.
 - Parish staff (and school, if applicable) should use communication channels and social opportunities to introduce the new pastor so parishioners can get to know his background, vocation story, etc.
 - Some communication channels to consider include bulletin ads, e-newsletter articles, social media posts, roadside signs, etc.



4. Embrace the Parish - New Pastor

A priest beginning a new assignment as pastor should convey his enthusiasm and interest in the parish and his interest in getting to know the people. While in some circumstances he may feel disappointment about being reassigned, it is best for him to offer those initial concerns up to God privately instead of sharing them with his new staff and parishioners.

☐ **The pastor should acknowledge that both he and his parishioners are being asked to adapt to change. He should invite them to walk with him through this period of transition and live out his calling as a true servant leader.**

- The incoming pastor will be inundated with a lot of new information very quickly. It is important that he gives himself what he needs for human formation by:
 - Identifying what needs to be done for his own health and wellness.
 - Setting and communicating boundaries (e.g., about days off, etc.)

The incoming pastor should take time and make an effort to get to know his flock before coming to any conclusions about them individually or as a community. Ideally, this can begin before he starts his new assignment, by visiting the new parish and making the rounds of the leadership and staff with the outgoing pastor. Once installed as the new pastor, he should:

- Schedule both group and one-on-one meetings with parish staff. Find out what they do best and what challenges they see that he can help them overcome. Lean on them as he becomes oriented to his new assignment – ask for help when needed and accept help when offered.



☐ **With guidance from the parish staff, identify key stakeholders – people in the parish he should reach out to so he can share his vision and his questions (see Appendix 2), and gather their input about the parish.**

- These parishioners should represent a good mix of roles and backgrounds across the community. Conversations can be conducted in a variety of ways, including one-on-one and small group meetings.
- A new pastor should not in a hurry to make changes until he understands the parish culture, the “lay of the land,” and has begun to establish good relationships with his parishioners.
- Host on-campus small-group lunches, dinners, or coffee and donuts with parishioners.
- For each get-together, the new pastor should think about whether to invite a cross-section of the community or members of a particular parish ministry. Each approach has its advantages.
- The new pastor should be prepared to share his story – why and how he answered the call to priesthood, his history, and his family.
- The new pastor should spend most of the time listening to the questions, concerns and ideas of parishioners.
- It is important that the new pastor makes an effort to go outside the parish grounds and meet every parish family through household dinners. While this may be a big undertaking in a large parish, it will help build relationships that will support his efforts over the long term.



APPENDIX II

Questions for a
New Pastor

- Ask select families to host a group of parishioners (10-12) in their homes for these gatherings. Allow the new pastor to attend as a guest, providing a setting where he is approachable and ready to listen.
 - Some questions to ask during these gathering might include:
 - Who are you, and how did you come to the parish?
 - What do you do – professionally or otherwise?
 - What do you love about this parish?

☐ **As the pastor gets to know his parishioners, he should consider how they can help him and the parish by sharing their gifts.**

5. Support Our Priests

A new pastor naturally goes through a grieving process as he leaves his previous assignment for a new one. This can lead to priests feeling a sense of isolation, particularly as they begin a new assignment where they are usually strangers and have not yet established a personal support structure with people they can confide. A happy, supported pastor can take better care of his parish.

☐ **A best practice for diocesan leadership is to establish a regular schedule of follow-up calls and/or visits with new pastors – for example, connect after one week, two weeks, two months, six months.**

- During these touchpoints, encourage the new pastor to share his joys and frustrations, his achievements, and his roadblocks to help him overcome any challenges.
- Consider establishing a “Pastor Transition Team” to help manage this process across the diocese.
- When needed, provide coaching for the pastor to help him develop the leadership skills he needs – such as how to engage a group, how to overcome an introverted nature, how to nurture and develop his emotional intelligence, or how to lead a meeting.

☐ **At the same time, parish leaders and other pastoral staff have a role in supporting their new pastor through his change in assignment.**

- Give the new pastor time and space to adapt.
- Advise him if he begins to take missteps.
- Acknowledge and appreciate the challenges he faces.
- Be sure he knows you’re there to provide both logistical and emotional support.



Conclusion

With proper preparation and clearly defined processes, the transition of a new pastor offers everyone involved the chance to take a fresh look at how they are bringing to life the Kingdom of God.

- The **outgoing pastor** can look back on his achievements as he looks forward to new challenges and opportunities.
- The **incoming pastor** gets to know a new community of believers, as he and his parishioners learn from and support each other in new relationships.
- The **community** benefits as the new pastor builds upon past successes while incorporating his own style and perspective.



“Father, they are your gift to me. I wish that where I am they also may be with me, that they may see my glory that you gave me, because you loved me before the foundation of the world.”

– John 17

Guided by the Holy Spirit, a pastor transition holds the promise of new growth, new life and new beginnings for everyone involved – a true cause for celebration.



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APPENDIX I
PASTOR TRANSITION PLANNING
DOCUMENTATION & CHECKLIST

Adapted from materials prepared by the Archdiocese of Cincinnati and the Diocese of Pittsburgh

Basic parish information

- Parish's formal name
- Number of households
- Any multicultural aspects of the parish
- Total weekend Mass attendance
- Mass schedule
- Data from past year
 - Infant baptisms
 - Adult baptisms
 - Catholic marriages
 - Interfaith marriages
 - Receptions into the faith
 - Confirmations
 - Funerals
 - Disciple Maker Index survey results (if applicable)
- Ordained parish staff
- Where the pastor resides
- Non-ordained and administrative pastoral staff members
 - School principal (if applicable)
 - Pastoral associate
 - Director of religious education
 - Youth minister
 - Music director
 - Business manager
 - Other staff
 - Number of religious educators – sisters or brothers (if applicable)
 - Number of lay teachers and school staff (if applicable)
 - Parish Council
 - Leaders, members, meeting schedule, scope of responsibilities
- Parish pastoral councils, such as:
 - Finance
 - Worship
 - Communication
 - Ecumenical
 - Education
 - Mission
 - Community affairs
- Lay liturgical ministry details, such as:
 - Lectors
 - Liturgy planners
 - Communion to shut-ins
 - Funeral planning
 - Ushers
 - Greeters
 - Volunteer musicians
 - Extraordinary ministers
 - Marriage preparation
 - Sacristy workers
 - Church décor
- Lay pastoral ministry details, possibly including:
 - RCIA
 - CCD teaching
 - Bereavement ministry
 - Home visits to shut-ins
 - Hospital visitation
 - Parish nurse
 - Crisis home care
 - St. Vincent de Paul Society conference
 - Ladies of Charity
 - Parish twinning
 - Community organization
 - Evangelization of unchurched
 - Reconciliation of inactive
- Lay renewal programs, such as:
 - RENEW
 - Adult catechumenate
 - Christ Renews His Plan
 - Cursillo
 - Marriage Encounter
 - Parish retreats (ACTS, etc.)
 - Parish mission
 - Bible study
 - Charismatic renewal
- Other parish organizations, including:
 - Knights of Columbus and Ladies Auxiliary
 - Athletic association
 - Older adult groups

Parish financial information

- Checking and savings accounts
 - Who are the authorized signers?
- Credit cards
- Who does the bookkeeping?
- What system of accounts is used?
- Pastor login/access
- Online giving provider and access
- Parish tax identification number
- Who administers fund-raising events?
- How are special collections handled?
- Total operating revenue
- Net operating surplus/deficit
- Parish cash and investments
- Parish long-term liabilities
- School budget (if applicable)

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Personnel

- Job descriptions
- Personnel policies
- Unwritten policies
- Contracted staff
- Other priests who assist the parish other than those assigned

Property

- List of property owned by the parish
- Is any of the property taxable?
- Where are the deeds?
- Where are the blueprints?
- Owned vehicles
- Insurance policies
- Parish keys/key codes
- Safe combination

Purchasing – details on how the following are purchased:

- Altar bread
- Altar wine
- Candles
- Bulletins
- Missalettes
- Book rack supplies
- Maintenance supplies
- School supplies (if applicable)
- Church envelopes

Communications

- Phone and internet provider
- Social media accounts and Newsletter (e.g., Flocknote) logins
- Wi-Fi and other passwords and logins
- Network security
- Voicemail password/login
- Is there an emergency line?
- How are emergencies routed to priest(s)?

Services and repairs

- Boiler/HVAC/plumbing/electrical service providers
- Snow removal service
- Fire extinguisher/suppression system details
- Landscaping service
- Pest control service
- Trash removal provider

APPENDIX II

QUESTIONS FOR A NEW PASTOR

Adapted from CLI's Next Generation Parish Process

New pastors should consider the following questions as they begin to dialogue with their new parish staff, leadership, and key stakeholders.

Core Questions

1. Based on your experience worshipping with the community, what would you say are the parish's primary values?
2. How would you characterize the sense of community in the parish?
3. What draws you to being part of this parish community instead of other options you have?
4. When has the parish been at its best? Why does this experience stand out to you?
5. What are the other strengths of the parish?
6. How would you characterize the parish's approach to hospitality to guests?
7. What is one issue or opportunity, if addressed, would take our parish to a whole new level of effectiveness?
8. In your role as a parishioner, ministry leader and/or staff member, what is the biggest challenge you face?
9. What are some areas of the parish where you'd like to see improvement?
10. What are the popular ministries here?
11. What does the parish do to make you feel welcomed?
12. What does the parish do to support your spiritual growth? What feeds you spiritually?
13. Is there anything else you'd like to tell me?

Staff/Ministry Leaders

1. What is the biggest challenge you face?
2. What can I do as pastor, and what can we do as a community, to help you overcome it?

School Questions

1. What is your role in the school?
2. What draws you to the school?
3. Describe the relationship between the school and the parish.
4. How does the parish support the school? How does the school support the parish?