

Parishes in Need of a Priest or Priest Transfer

Metropolis Strategic Goal 2.2

Opening Letter

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

Welcome to the guidelines for Clergy Transfer from within the Greek Orthodox Metropolis of Atlanta and outside the Metropolis.

Through these guidelines, we hope to offer a map for clergy and their families who are in the process of assignment or transfer to a new parish. This map also offers direction for parishes who are also in the process of seeking a Priest to serve their parish family.

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

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

The information provided may not be able to anticipate every possible scenario involving clergy transfer, but our prayer is to set a framework that reflects an Orthodox Christian mindset.

Our goal is to welcome you and your family in to our Metropolis in a nurturing and loving manner.

The Metropolis of Atlanta 2.2 Task Force Team

Overview of Ministry

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

Luke 6:31.

"Let all things be done decently and in order."

1st Corinthians 14:40.

Framework of Clergy Transfer

- *Clergy Transfer includes many variables for Clergy their families and the parish.*
- *Since the assignment of a Priest to a community can be considered as sacred as the marital relationship, it is crucial that all steps are taken to make the right match for the Priest and the parish. Clergy want to succeed in their Priestly ministry and parishes want to have a faithful and skilled leader.*
- *The first step in all circumstances, following the proper protocol, is for Priest seeking assignment and for a parish in need of a Priest to contact their respective Hierarch and Chancellor.*
- *The second step is to Pray. Prayer is essential for a spiritually wholesome transition – Perhaps the most thoughtful action for clergy and a parish during the transition process is to pray to God in the Holy Spirit to be their constant Guide. Our most profound example is our Lord and Savior Jesus Christ Who prior to calling His disciples, went out to the mountain to pray to God His Father. In the Gospel of St. Luke, we read that He prayed all night. When the sun came up, He called His disciples to serve. He did this by calling them by name (Luke 6:12). He then proceeded to heal all those He encountered to convey several important teachings in what we know as The Beatitudes. In verse 31, of*

the same chapter he says, “And as you wish that men would do to you, do so to them.” St. Paul adds in his first letter to the Corinthians the following, “Let all things be done decently and in order” (1 Cor. 14:40).

- Prayer will remind us to be mindful of our Lord and St. Paul’s words in order to make the entire experience of clergy and parish transition a successful and seamless one. This is the goal of these guidelines and it is for the good of the Church, the parish and the clergy. Therefore, we begin this important journey by praying for the Holy Spirit to come down upon all those participants in this momentous process.

Step 1

Becoming Acquainted with the Leadership of our Metropolis

Each parish who is in need of a Priest should become acquainted with the Metropolitan in the Metropolis of Atlanta. In this first step the Parish Council under the direction of its president, should make an appointment to visit His Eminence and the Chancellor.

Step 2

Parish History and Particular Needs

- ✓ Each parish has a unique history and particular needs in receiving a new Priest.

- ✓ A parish should formulate in writing what they are looking for in a senior Priest/Proistamenos or an assistant Priest/Ephemerios.

What is your parish looking for in your new spiritual leader?

Here are a few things to consider:

- Education
- Administrative experience
- Language capabilities
- Years of experience
- Specific characteristics and abilities
- Theological & Biblical knowledge
- Liturgical strengths and weaknesses
- Any other special needs of the parish

Step 3

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

- ▶ It is up to the discretion of the Hierarch as to the procedure for introducing a newly assigned clergyman to the parish. The present practice is for His Eminence and the Chancellor to present the

newly assigned clergyman officially at a reveal meeting with members of the Parish Council.

- ▶ When possible, it would be beneficial to both the clergy and the parish lay leadership to meet in advance of the official assignment.
- ▶ The expenses of such a visit should be assumed by the parish.
- ▶ The parish should provide the prospective clergyman with parish historical information or the Priest should request such information.

Step 4

Education and Work Experience

To achieve the best fit, the Priest and his Presvytera should provide details of their education, work experience, accomplishments, significant debt/financial hardship and any other important information that would assist His Eminence and the Chancellor in the transfer process.

Step 5

Formulation of a Clergy Welcoming Committee

The Parish Council President shall appoint a Clergy Welcoming Committee

The Parish Council President shall appoint a Clergy Welcoming Committee with the following responsibilities

- With the blessings of the new Clergyman, the Committee should plan a reception for the new Priest (and family when applicable), after the first Sunday Divine Liturgy.
- Other events should also be planned so that the Priest, Presvytera and children (when applicable) can meet members of the parish family.
- Each plan should meet with the approval of the newly assigned clergyman and be customized to meet the unique needs of the individual parish.
- A Committee member(s) should accompany the Priest and Presvytera and children (if any), to various events in the first month.
- We should not overlook the importance of offering our Presvyteres the same care and attention in the moving experience. Studies tell us that much of the pressure of any relocation falls on the

shoulders of our spouses. It is important to direct some personal attention to our Presvyteres, which will also help to relieve much of the pressure that is on our Clergy during their relocation.

- The Parish should learn the ages, and academic, extracurricular and any health or other needs of the children of the Priest and Presvytera and assist in facilitating the integration of their children into the community, schools and other activities.
- Appropriate introductions, recommendations and assistance should be offered by the Parish to facilitate the smoothest integration of the children into their new community, schools and other extra-curricular programs.
- As a part of that process, it could be helpful for age-appropriate youth from the parish, with similar interests to the children of the clergy, to be part of the welcoming committee to specifically welcome and interact with them.

Step 6

Creation of a Clergy Welcome Packet

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

the Welcome Packet makes settling in to a new city and parish much easier.

Formulation of a Clergy Welcome Packet

To assist in the relocation process the parish should provide at a minimum the following information prior to his arrival:

- *Information on public and private schools.*
- *A directory of physicians, optometrists, dentists, realtors, insurance agents, attorneys, accountants, financial planners, etc.*
- *Assistance with choosing an area to lease or purchase a residence taking distance from the parish into consideration.*
- *Traffic considerations.*
- *Proximity to Hospitals, funeral homes and cemeteries.*
- *Any other important considerations.*
- *Parishes should include a listing of health care facilities. i.e. hospitals, hospice and funeral homes with a contact person if applicable.*

- ***Parishes should provide their new Priest with a listing of the tax offices and dates of certain deadlines.***
- ***The Archdiocese has recommended W-2 forms to be issued to all clergy, regardless of self-employment status. 1099s are discouraged.***
 - ***(Additional information can be found under Clergy Remuneration).***

Please be cognizant of the fact that transfers often happen very quickly, assisting the Priest and his family as needed, when settling into a new city provides a positive beginning for the parish and the Priest.

Relocation Policy Guidelines
Greek Orthodox Metropolis of Atlanta

IRS DISTANCE AND TIME REQUIREMENTS

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

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

In order for a taxpayer's moving expenses to be deductible, an employee must not only meet the distance requirement, but must also be a full-time employee in the general location of the new residence for at

least thirty-nine (39) weeks in the twelve (12) month period immediately following the start of work in the new location.

RECORD KEEPING

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

HOME MARKETING ASSISTANCE

Have a local real estate agent(s) and prepare a Broker Market Analysis (BMA) for outgoing Priest which includes:

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

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

HOME PURCHASE ASSISTANCE

For Clergy planning to purchase in the destination location a qualified real estate broker in the destination area can be recommended by the outgoing Priest and or Parish Council to assist you with selecting a community or home in your new community. All closing costs associated with the purchase of a new home are not eligible for payment or reimbursement.

The recommended real estate broker or rental agent in your new community should:

- Meet with you and identify your needs concerning housing
- Referrals to national mortgage lenders that offer competitive-rate products
- Assisting you with local custom information and negotiation strategy
- On-going support and follow-up

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

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

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

RENTAL ASSISTANCE

If you chose to rent in your new community your real estate agent should provide you with the following:

- Website referrals
- Reviewing the lease terms
- Installing a job transfer cancellation clause
- Phone consultation and needs assessment to determine housing, lifestyle, commute and area preferences
- Destination area overview including neighborhood characteristics, rent ranges and rental market trends
- Initial list of properties best matching budget, needs lifestyle, and area preferences

TRANSFER CLAUSE

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

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

TRANSPORTATION OF HOUSEHOLD GOODS

Moving is very stressful for the Priest, Presvytera and children (when applicable). There can be both positive and negative emotions for all concerned. A Priest and his family are free to choose their own movers but the relocation cost must be approved by the Parish Council. Ideally, the Priest will secure three bids from reputable moving companies. Recommendations should also be sought from the Parish Council.

Seminary graduates usually have less to move so companies like PODS are encouraged. Parishes are not expected to cover the moving company costs related to packing household items and books.

Fine china and other precious "high value" insurable items of course will need to be packed professionally.

Everyone should customize their move to meet their needs.

If you choose to use a moving company to move your personal household goods to your new community, all usual and reasonable costs for packing, loading, valuation, transporting, and delivery of the furniture and household effects will be direct-billed to parish of the new assignment with the provisions outlined in ***TRANSPORTATION OF HOUSEHOLD GOODS***".

When you are planning your move (please provide at least thirty (30) days prior to the move date), you should immediately notify a moving service authorized by your new Parish Council to schedule your move. The moving company will make an appointment to survey the household goods to determine approximate van space requirements and set packing, loading and delivery dates. They will provide you

with a range of delivery dates within which you can expect delivery of your goods. ***You must be available to accept delivery from the first scheduled delivery date, while the carrier is obligated to deliver by the last date.*** All moves will be scheduled during weekday dates and normal business hours for packing, loading, and delivery.

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

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

Other expenses that will not be authorized:

1. Weekend or holiday packing, loading or delivery

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

SHIPMENT OF AUTOMOBILES

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

VALUATION COVERAGE OF HOUSEHOLD GOODS

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

LOSS AND/OR DAMAGED CLAIMS

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

TEMPORARY STORAGE

The parish where the Priest is being assigned is asked to cover up to thirty (30) days of temporary storage at destination. This should be included in the moving allowance already approved by the Parish Council and should not be, if possible, an additional expense.

TEMPORARY LIVING

Temporary living accommodations should be made available by the Parish if you are unable to move into your new home or apartment at the time of arrival in your new community.

TAX TREATMENT AND TAX ASSISTANCE

Under current Internal Revenue Service regulations, the new parish is required to report as income to you

most of the relocation expenses paid on your behalf or for which you are reimbursed. However, you may be entitled to claim a deduction on your personal income tax return for certain expenses.

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

Step 7

Parish Information Packet

To insure a smooth transition the Parish Council should orient the newly assigned Priest with the following information:

PARISH INFORMATION PACKET

1. A detailed narrative on the state of the parish.
2. Current number of pledging families.
3. Year to date and the prior fiscal years financial reports, including the annual budget, profit and loss statements and balance sheets.
4. Prior years Parish Council meeting minutes and Parish General Assembly minutes.
5. Most recent parish directory, bulletins/newsletters from the previous year to present.
6. A Master Calendar with upcoming services and events.
7. Past parish yearbooks and directories.

8. A list of parish ministries with names and contact information of chairpersons/leaders.
9. The Parish Council may also choose to include other pertinent information that would assist the newly assigned Priest in becoming acquainted and up to speed with the parish.
10. The Parish Council will update all printed and digital materials.

Step 8

Housing Challenges during Transition

A parish may consider many things in assisting their new clergyman and his family during transition and relocation.

Housing Challenges during Transition

Parishes can assist the Priest and his family by:

- Considering the challenges of relocation, including selling their previous home
- Providing a temporary residence until the home is sold
- Considering the disparity in cost of living from one parish to the next

- Adhering to the Parish Regulations of the Archdiocese including the covering of all moving expenses.
- Parish provides an allowance in their budget to support the moving expenses and adjustments in remuneration.
- Consider unique circumstances, i.e. assisting Priest and his family with housing, possible interest-free loans and the variance in the cost of living.

If a Priest is assigned and his family cannot move immediately for reasons related to the selling of their home, the child or children's education, the parish may also consider assisting with housing. (This issued should be agreed upon before an assignment is final).

Our goal is to ensure a smooth and loving transition. Any questions or unique circumstances should be brought to the attention of the Chancellor or in his absence the Hierarch.

Step 9

Remuneration Details

The Archdiocese Regulations in Article 17, section 8, states a parishes obligations regarding remuneration.

Compensation of clergy is a very important and sensitive area during clergy transition.

REMUNERATION DETAILS

- Clergy should provide the respective Hierarch and Chancellor with a written document outlining current compensation and amount owed for all student loans, significant debt or unique circumstances if applicable.
- The clergyman and his Presvytera should arrange to meet with the Hierarch and Chancellor to discuss financial expectations or special circumstances.
- Information regarding the obligatory participation in the pension program and the health plan of the Archdiocese should be provided.
- The Archdiocese Remuneration Scale, which is distributed to all parishes annually, shall serve as a foundational guide in determining salary and benefits at the Hierarchs discretion.
- Special considerations, i.e. cost of living based on geographical location, size of the parish, education level and experience of clergyman should all be considered in determining remuneration.
- Parishes should also contact the Archdiocese Chancellor's Office for guidelines on issuing W-2

forms and other tax laws regarding housing allowances, transportation, health insurance, etc. (Reference also Archdiocese Regulation, Article 17, section 8).

- Especially for first assignments, Priests should also contact the Archdiocese Chancellor's Office to obtain guidance on current clergy tax laws.
- A W-4 form must also be completed and kept on file in the church office before the first pay period.

Step 10

The Archdiocese Pension Program

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

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

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

THE ARCHDIOCESE PENSION PROGRAM

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

Step 11

THE ASSIGNMENT OF AN EPHEMERIOS OR SECOND PRIEST

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

All the steps above should be applied and in addition,

ASSIGNMENT OF AN EPHEMERIOS OR SECOND PRIEST

- A collaborative effort is imperative between the Hierarch, Chancellor and Proistamenos when considering candidates for assignment as Ephemerios or Second Priest.
- The Proistamenos should meet with potential candidates, with the blessings of the Hierarch and offer feedback to the Hierarch and Chancellor.
- The Hierarch, Chancellor, Proistamenos and Parish Council President should meet the potential candidate in advance of final assignment.
- If this is the first time the Proistamenos will be having a second Priest, he should seek the counsel of his Hierarch and Chancellor and other Proistameni with experience in this area.
- All the Guidelines in this document and the Guidelines for Parishes pertaining to the

assignment of a Proistamenos should apply to the Second Priest as well.

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

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

- **The ultimate goal for the Proistaminos will be to mentor the Second Priest, nurture him, enhance his ministry and guide him in his growth eventually to Proistaminos of his own Parish.**