

## **SERIES 5000**

### **KEEPING FAITH WITH OUR RETIRED PRIESTS**

#### **5100 INTRODUCTION**

The retired priests of the Archdiocese continue to serve our local Church through their active ministries, their pastoral wisdom, and most of all through their continued fidelity to their priestly promises and witness. It is in gratitude for the service of these men of God over a lifetime that the Archdiocese commits itself to providing them financial support, personal care and priestly solidarity. It is in recognition of the unique commitment that diocesan priests make to this Archdiocese that this care should include the provision of housing, health care, a pension, and the spiritual and fraternal support so necessary to creating a supportive environment for retirement.

#### **5200 PRIESTS' RETIREMENT BOARD**

Recognizing that the Archbishop exercises the primary pastoral responsibility for the pastoral care of retired priests of the Archdiocese, a Priests' Retirement Board shall advise the Archbishop on the constellation of issues which pertain to retirement. This Board shall be composed of the Archbishop, the Vicar for Clergy, and the Vicar for Administration ex officio; two non-retired members elected by the presbyterate, three retired members elected by the retired presbyterate, and three members appointed by the Archbishop. One of the appointed members shall be a lay person, while the remaining two appointed members shall be priests of the Archdiocese.

The Priests' Retirement Board meets as needed, usually several times annually, to review existing programs for the care of retired priests, evaluate emerging needs of retired priests not currently being met, and be a conduit for concerns raised by the retired priests themselves.

#### **5300 AGE OF RETIREMENT**

The normal retirement age for a priest of the Archdiocese is seventy. Priests may request early retirement from the Archbishop if they have reached the age of sixty or for health or medical reasons.

The Vicar for clergy shall present each case to both Personnel Board and the Retirement Board who will determine the benefit package.

## **5400 ARCHDIOCESAN PRIEST PENSION PLANS AND FUNDS**

The Archbishop has established a retirement program to provide a stable and financially secure retirement for all of the incardinated priests of the Archdiocese.

The IRS-qualified priests' retirement plan of the Archdiocese provides a vested monthly income for retired priests based upon their years of service in this Archdiocese.

The supplemental retirement plans of the Archdiocese provide health care and housing allowances for our retired priests, as well as an appropriate base level of benefits for those priests who do not qualify for an adequate pension through the qualified pension plan.

It is the responsibility and commitment of the Archdiocese to provide sufficient funding to maintain the health and stability of these qualified and supplemental retirement programs. Such funding will come from the proceeds of the Archdiocesan Annual Appeal, the annual collection for retired priests and various bequests and gifts donated to the Archdiocese for the benefit of retired priests.

## **5500 HOUSING**

Retired priests may select from three differing housing options:

### **5510 Living in a parish rectory:**

A retiring pastor will be required to move from his present parish to a new residence. A priest choosing to live in residence in a parish will receive from that parish the same benefits as a priest assigned to active duty in that parish, with the exception of salary, health premium and retreat fee. Those benefits provided by the parish will normally be given without reimbursement in recognition of the retired resident priest's on-going service to the parishioners. In cases where this would create a financial hardship for the parish, the pastor may request the payment of the standard housing benefit on behalf of the retired priest from the supplemental priest's retirement fund.

### **5520 Living in congregate housing provided by the Archdiocese:**

(E.g. Serra Clergy Retirement House). The cost of this housing and board shall be borne by the Archdiocese.

### **5530 Living in non-Archdiocesan owned housing:**

Each retiree shall receive the standard housing benefit from the supplemental retirement fund to help defray the cost of such private housing and board arrangements.

## **5600 ASSESSMENT AND SUPPORT**

Care for our retired priests entails recognition that the aging process can require substantial changes in a priest's ability to remain healthy and meet the requirements of daily life. While it is vital to recognize the legitimate freedom of each retired priest, pastoral solicitude demands that our retired priests be supported by a systematic program of professional assessments and evaluation that can alert the priest and the Archbishop to changes in the priest's physical health and mental faculties. The Priest's Retirement Board advises the Archbishop on the proper scope and substance of this program.

The Vicar for Clergy works in collaboration with the Archbishop to insure that every retired priest continues to live in an appropriate setting and receives the spiritual, health, pastoral, physical and financial resources to enjoy the healthiest and happiest possible retirement.

## **5700 LONG-TERM CARE**

The cost of assisted living and skilled nursing care for Archdiocesan retired priests constitutes both a burden and a worry for priests as they enter into their retirement years. Because of the lifetime commitment of service to the people of our local Church given by our retired priests, it is appropriate that the Archdiocese share part of that burden. Four principles govern the nature and scope of financial support for assisted and skilled nursing care: 1) the Archdiocese can and should provide a substantial share of the cost of assisted living and skilled nursing care for every priest in need of such care; 2) the Archdiocese should insure that no priest is precluded from receiving quality care because of financial limitations; 3) Archdiocesan policy should flow from the recognition that many priests have financial resources beyond their pension and social security benefits that could meet some of the cost burden of assisted/skilled care; and 4) the limited monies available for the needs of retired priests should be applied among the competing priorities of pension, health care, and housing on the basis of where those funds are most needed.

In light of these principles, the Archdiocese will provide to every priest in need of assisted living or skilled nursing care a housing allowance paid to the facility where the priest is going to receive the prescribed assistance and care. This assisted living/skilled nursing allowance will be the lesser of: one half of the monthly cost of the assisted living/skilled nursing facility or an amount equal to the monthly pension benefit of a fully vested priest of the Archdiocese who has served for thirty years.

Any priest who is unable to pay for quality residential or skilled nursing care with the help of this basic care allowance, the regular Archdiocesan pension, Social Security and his other financial resources, may apply for additional financial assistance from the Archdiocese. This application will entail a comprehensive review of the applicant's financial resources, and the principle governing that review would be that no priest should be unable to obtain quality care because of financial limitations.