



DIOCESE OF WORCESTER

PRIESTS' RETIREMENT POLICY

“When a pastor has completed seventy-five years of age, he is requested to submit his resignation from office to the diocesan bishop who is to decide to accept or defer it after he has considered all the circumstances of the person and place. Attentive to the norms established by the conference of bishops, the diocesan bishop must provide suitable support and housing for a retired pastor.” (Canon 538, Section 3)

“It is incumbent upon any bishop to care for his retired priests who have given priestly service to the Diocese for the better part of their lives. It is my intention to judiciously provide adequate housing, health care, salary, and benefits to our priests, as have all my predecessors.” (Bishop McManus, in a letter to all Worcester diocesan priests, November 10, 2010.)

OVERVIEW

The intention of the policy is to provide the priests of the Diocese of Worcester a better informed understanding concerning their options and benefits when approaching retirement, be it for reasons of health or age. This is a general policy with the intention of providing our priests with a level of certainty, understanding, and peace of mind regarding the financial and medical care expected and deserved after many years of serving God's people in our Diocese. The fundamental understanding is that the Bishop of Worcester will provide for the basic needs of his priests upon their retirement.

PLANNING FOR RETIREMENT

In preparing for retirement, it is essential to both the individual priest and the Diocese that each priest will plan years ahead of his retirement regarding his future place of residence and financial security. This responsibility belongs to the individual priest. Preparing for a comfortable, worry-free retirement coincides with building up one's personal retirement funds and savings to enhance the benefits received from the Diocesan Retirement Policy, Social Security, and medical benefits. The option of having the Diocese provide a residence within the financial means of the Diocese, or choosing his own place of residence, is a decision that belongs solely to the individual priest. If a retiring priest does not have a place to live, then the Diocese will assist him in finding a residence.

RESIDENTIAL OPTIONS

The options for a retiring priest are the following:

- 1) Personally arrange for his own housing, be it his own home, or another living arrangement that may or may not be connected to Diocesan-owned property.
- 2) Have the Diocese provide for a residence within the financial means of the Diocese, a residence that may or may not be connected to Diocesan-owned property.

Diocesan related options presently include a limited number of apartments at Southgate in Shrewsbury, along with suitable rectories within the Diocese that can support the living arrangements of a retired priest who can care for his personal needs.

SOUTHGATE OPTIONS

Regarding Southgate, the number of retired priests residing there in independent living will be capped at 12. For retired priests who require assisted living, services rendered by Southgate for this means of care will continue to be used.

The process of deciding who will move into Southgate will be determined by need, followed by seniority, meaning years of service to the Diocese.

A requirement for moving into Southgate is to make Southgate the primary residence of all retired priests who reside there.

A retiring or retired priest who prefers to make Southgate his place of residence is to make this known to the Bishop of Worcester, who, first, determines residency according to need, and second, seniority, based on the availability of apartments at Southgate.

RECTORY OPTIONS

A second option for a retiring/retired priest who has need of the Diocese to provide a residence is a rectory. The requirements for this option are to be based on the following conditions:

Any priest moving into a rectory is to be a high functioning priest, one who maintains the ability to care for all his personal needs. If the health of a high functioning priest deteriorates to the point of needing daily personal attention, he will be moved from rectory living to assisted living, or a nursing home, to provide for the necessary level of care needed.

For any parish accepting a retired priest, the approval of the Pastor of the parish is necessary prior to his rectory becoming a place of residence for the retired priest. Also, the Parish Council in the respective parish providing residence for a retired priest should be made aware of his incoming presence beforehand.

Even though rectory living is restricted to a retired priest who is high functioning and capable of caring for his personal needs, any rectory that is to be the residence for a retired priest is to have a working staff who can provide for some necessary accommodations for him. This may include meals, with the knowledge and concern for any special dietary needs; laundry service; the concern of socialization is to be considered, with an emphasis on a retired priest not

being alone for long periods of time; the safety of a rectory regarding stairs, bathrooms, and all associated with a retired priest's mobility; the cleanliness of the rectory. The Diocese will assist in financing such services.

PLANNING FOR YOUR RETIREMENT COSTS

Concerning the following paragraph, each retiring priest is to inquire with the Diocesan Fiscal Office regarding the amount of finances to be received for his respective living arrangements. Because such an amount will fluctuate from priest to priest, and will increase over time, what is stated next is a basic understanding of where funds apply.

HOUSING SUBSIDY

The Diocese pays \$1500 a month toward the rent of each independent living apartment. A priest who lives at Southgate will pay the balance of the rent from his monthly salary. This amount is dependent upon the type of living arrangement, whether a studio or apartment. A priest who lives in a rectory will receive a monthly salary from which he will pay for the cost of his residence and all other costs associated with rectory living. A priest in assisted living will receive \$100 a month from his salary with the rest of his salary helping to fund the cost of the assisted living facility. A priest whose condition is determined to be in need of permanent, fulltime nursing home care will receive a full salary which will help toward financing the cost of his care. *The Diocese will also pay all additional costs of the first 60 days of nursing home care, less what health insurance may pick up, e.g. rehabilitation care in the nursing home transitioning to long term care. After the first 60 days the priest's UNUM policy would pay the duration of care the priest opted for his insurance. Beyond the limits and duration of the UNUM policy, the priest's personal assets would have to be used to pay for nursing home costs.* A retired priest receiving rehabilitation care with the expectation of returning to his residence at a future date does not fall under the previous category of fulltime nursing home care, thus he continues to receive a monthly salary based on his living arrangement.

HEALTH CARE

Concerning the responsibility of health care for retired priests in the Diocese of Worcester, currently the Clergy Benefit Plan is assuming health and dental care through parish assessments, while being partially subsidized from the diocesan retirement fund.

RETIREMENT BENEFITS

A list of benefits available to retired priests includes:

- Healthcare and dental care through the Clergy Benefit Plan subsidized by parish and diocesan funding.
- Priest Retirement Fund.
- Annual Priests' Retreat.

- Annual Presbyteral Assembly.
- The financial assistance of Unum, where applicable.
- The financial assistance of Mass Health, where applicable.

PRESBYTERAL CONTACT PERSON

When a contact person is needed in the Presbyterate, and a priest has concerns or questions about his retirement, the persons to contact are the Director of Priest Personnel and/or Minister to Priests.

SENIOR PRIEST STATUS

Concerning Senior Priest status, there is an existing policy in the Diocese of Worcester, which states the following:

- The retiring priest is to leave his own rectory.
- The retiring priest is to find another rectory in which to live.
- The retiring priest is to work out with the Pastor of the new parish the amount of compensation he will receive, along with his responsibilities in the parish.
- In order to receive his full retirement salary, the shortfall in the salary the senior priest receives from the parish will be supplemented from the Priest Retirement Fund.

POLICY REVIEW

It is recommended that this policy be reviewed every three years by the Priests Retirement Committee and each Deanery in order to make any necessary adjustments by adding or removing information that will better serve our Diocese and its retired priests.

Effective Date: March 19, 2014