



Basic Steps When Considering a Parish Merger

Steps to be initiated by the **Pastor**

Preparing a Request for Merger

1. **Request a copy and read the Parish Merger Process Guide.** Reach out to the [Office for Strategic Planning](#) for a copy of the Parish Merger Process Guide and to address any questions you might have regarding its content before proceeding.
2. **Review the guide with your Family Pastoral Council and Family Leadership Team.** Ensure the review includes your business manager and, if you have a school, your school principal. This ensures that all those involved understand the necessary steps to consider a parish merger. *The process of considering a decision to merge parishes needs to be collaborative and include increased communication during all the steps involved.*

Starting on page 8 of the Parish Merger Process Guide, complete the following steps:

3. **Step 1 - Viability Analysis:** Your pastor and Family Pastoral Council should meet to discuss the topic and implement a formal viability analysis. *Ensure you begin the documentation process now and collect all notes, agenda and minutes.*
4. **Step 2 - Analysis Review and Ratification:** Once the analysis is complete and recommendations formulated, present the report to the Family Pastoral Council and Family Leadership Team for review and to ratify the recommendations. *During this step, it is important that you have had frequent communication with your dean and received his approval to proceed.*
5. **Step 3 - Present the Recommendations to Your Parishes:** This step is critical and should never be eliminated. It is very important that this process is well-documented, along with any feedback and results. *Parishioner feedback should be heard and documented. Attempt to answer questions when asked or collect questions so they can be answered in a future information session or communication.*

- a. **Right Sizing Is Ratified** – Create a formal plan for the implementation of the right sizing recommendations. Your Family Pastoral Council should annually monitor this plan for progress and changes and report on this in the annual plan report, which is submitted to the dean and archbishop. *If no immediate further steps are taken, your Family may still recommend a merger in the future, so all documentation should be archived for future review.*
- b. **Merger Is Ratified** - If a merger is ratified and the local dean has approved the decision, your pastor will send a formal letter to the chancery and the archbishop requesting the merger. The letter should outline the issues, steps taken, approvals and ratified recommendation(s). All documentation should be organized and made available upon request by the archbishop or chancery. Expect this step to take time, understanding that the archbishop must also consult with the archdiocesan presbyteral council. The archbishop will respond to the request in a formal letter. *Neither your pastor nor your Family should take any further steps until the request is approved or declined.*

Initiating an Approved Request for Merger

6. **Step 4 - If the Proposal for Merger Is Approved:** Begin the process outlined in the Parish Merge Process Guide, starting at step 4 and continuing through the rest of the guide.