

SERVITE FATHERS  
ASSUMPTION CHURCH  
323 WEST ILLINOIS STREET  
CHICAGO, ILLINOIS 60610

Fullness in Christ

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# FULLNESS IN CHRIST

A REPORT ON A STUDY OF  
CLERGY RETIREMENT

SERVITE FATHERS  
ASSUMPTION CHURCH  
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*The Bishops Committee on Priestly Life and Ministry*



# **FULLNESS IN CHRIST:**

## **A REPORT ON A STUDY OF CLERGY RETIREMENT**

### **THE BISHOPS' COMMITTEE ON PRIESTLY LIFE AND MINISTRY**

1979

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## FOREWORD

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# **FULLNESS IN CHRIST: A REPORT ON A STUDY OF CLERGY RETIREMENT**

## **INTRODUCTION**

There was a time when growing old in America was a hidden experience. More recently, however, the negative connotation of aging and society's expectation that older citizens are the unproductive wards of the community have been stoutly challenged. The challenge is issuing not just from younger spokespersons for the elderly, but from the elderly themselves. Senior citizens groups, once content to reside quietly among us, have become politically active. There is heated debate over such concepts as mandatory retirement in business and government, the fiscal soundness of the social security system and the fundamental assumption that retirement is a social benefit.

## **CLERGY RETIREMENT**

For the past ten years, the Catholic priests of this country have been part of this social experience. The challenge, questioning, and struggle for reformulation of the experience of aging and retirement that are typical in the lay community find parallels among the 3000 priests already retired and among their younger brothers in the priesthood. The retirement of clergy is a relatively recent experience but its roots can be found in the Catholic community's abiding concern for the welfare of its priests.

The Church has always been sensitive to its responsibility to care for the needs of infirm and disabled priests. As early as 1884, the Third Plenary Council of Baltimore explicitly cited the need to secure funds from parishes to minister to infirm clergy. But like the larger society within which they served, Catholic priests expected to minister their whole lives until death or disability brought their service to a conclusion. Little thought, and

certainly no planning, went into preparation for the reduced responsibilities of retirement.

It was the renewal of Vatican II that introduced, for the first time, the concept of "resignation" from the pastorate. In its decree on the pastoral office of the Bishops, *Christus Dominus*, the Council stated in 1965:

Pastors who were unable to fulfill their office properly and fruitfully because of the increasing burden of age or some other serious reasons are urgently requested to tender their resignation voluntarily or upon invitation from the Bishop.<sup>1</sup>

One year later, in his *Motu Proprio*, *Ecclesiae Sanctae*, the document implementing *Christus Dominus*, Pope Paul formulated a policy statement on "resignation," adding for the first time in official Church documents a stated age for resignation for both bishops and pastors:

. . . all diocesan Bishops and others who are equivalent to them in law, are earnestly requested to tender their resignation from office of their own free will, not later than at the completion of their 75th year of age, to the competent authority, which will act on the request after considering all the circumstances of each case.<sup>2</sup>

. . . all pastors are asked to offer spontaneously to their Bishop their resignation from office, not later than the completion of their seventy-fifth year of age. The Bishop will decide whether to accept or defer the resignation in view of all the personal and local circumstances.<sup>3</sup>

The Pope also applied the concept of age-determined competence to his own administration by eliminating members of the College of Cardinals who are over 80 years of age from voting in papal elections.

Thus, the documents of Vatican II and the Holy See introduced two notions—that of "voluntary resignation" from the pastorate and that of resignation date determined by age. The purely "voluntary" nature of resignation was rendered somewhat ambiguous by such phrases as "(Pastors) are asked to offer spontaneously . . . their resignation" or "upon invitation from the Bishop." Nonetheless, based on these concepts, dioceses and religious communities across the United States began to discuss and implement programs of "retirement" for aging clergy and religious. To date, no comprehensive analysis of the dimensions,

the development and the results of this new program has been carried out. There seems to be a sentiment, shared by many priests, that the experience has been a mixed one. The priests who have entered retirement willingly have felt some sense of relief at being free of administrative responsibilities. They were able to pursue personal goals or to assume more personally fulfilling pastoral roles. There were many priests, however, who went into retirement unwillingly. Some did so only under obedience. Others found retirement preferable to ministering in a Post-Vatican II Church for which they were never prepared. Whether a priest went willingly or unwillingly, he seldom joined the ranks of the retired without some anxiety or small feeling of rejection.

## **THE OBJECTIVE OF THE STUDY**

The Committee on Priestly Life and Ministry, through its own consultation process, realized that there was a growing sense of concern about retirement among the clergy of this country. Topics such as pension plans and pre-retirement planning programs were appearing on the agendas of Priest Senates and Councils with increasing regularity. The Committee commissioned its subcommittee on Continuing Education to undertake a study of the experience of the more than 3000 priests who have retired in the past ten years. It was hoped that such a study would provide background material for the current discussion occurring in various dioceses throughout the country.

This report contains the results of that Committee's efforts. With the cooperation and assistance of the NCCB Committee, Reverend Walter Jenne, a graduate student in the School of Social Work at Catholic University, conducted a thorough study of the clergy retirement experience in the United States.<sup>4</sup>

Father Jenne's paper sought to determine the extent to which dioceses across the country have implemented a series of recommendations made in 1969 at an Institute on Planning for Retirement and Pre-Retirement for Priests sponsored by the National Conference of Catholic Charities.<sup>5</sup> In the process of ascertaining the extent of implementation of the Institute recommendations, the Jenne study sketches a general picture of how the national Church is organizing and carrying out its clergy retirement programs.



The results of his study, contained in full in the appendix of this report, furnished the Committee with a much needed data base for their analysis of the clergy retirement experience. The Committee then proceeded to summarize the Jenne study and to develop this report which combined the findings of the study with current thinking of those who were working in the field of clergy retirement and to formulate recommendations and suggestions that might assist dioceses and local Senates or Personnel Boards in their efforts at responding to the retirement needs of the clergy.

This brief report has obvious limitations. It is not intended to be a planning guide or a "how to" presentation for those engaged in the field of clergy retirement. It gives only marginal treatment to the area of retirement in communities of men religious. The issue confronting women religious and lay employees of the Church, although related to clergy issues and of vital importance in themselves, are not considered here at all. The report is not intended to be definitive or final in any of its conclusions. While the statistical data from the Jenne study was judged to be very reliable, the remainder of the report, Section II, the analysis of the data, and Section III, the proposal of a new model, were written with the hope that they would evoke a response, a challenge or a suggestion for improvement.

## **USE OF THE TERM**

Throughout the course of this report, the word "retirement" will be used. The problem in the use of this word, even though it is commonly accepted in clergy circles, is that it does not mean the same thing in society in general as it does within the priesthood. In society, retirement is generally understood to mean removal from the active work force and applies more to industrial than to professional workers. As will be seen later, it has taken on an accommodated sense for the priest. Most priests who are technically retired remain active in the ministry in some manner. To function in ministry is so integral a part of a priest's life that it continues even many years after official retirement. The process that the word retirement describes for priests is more a process of laying aside demanding administrative responsibility while maintaining pastoral duties.

# **SECTION I—THE NATIONAL EXPERIENCE**

## **DIOCESAN CLERGY RETIREMENT**

In the 139 dioceses which responded to the Jenne survey, there are 2,988 diocesan priests who are retired and of these about 25% live outside of the diocese in which they ministered. Of the dioceses responding, over 90% (123 dioceses) state that they do have a definite retirement policy and that it is clearly stated and followed. The issues determined in these policy statements cover a broad range of concerns including retirement age, pension benefits, housing and living arrangements, continued ministry, pastoral services for retired clergy and pre-retirement programs. The policy and program considerations in each of these areas will be briefly summarized here.

### **A. Retirement Age**

A major policy question in determining the date or age of retirement is whether retirement will be mandatory or optional at the designated age. Ninety-one dioceses report having a mandatory age. Of the remaining 48 dioceses, some have an optional age while others indicate that the date of retirement is determined on an individual basis by the local Ordinary in consultation with the priest. It is not uncommon for a diocesan policy to designate both an optional and mandatory retirement age.

The designation of actual optional and mandatory retirement ages varies on a range from 60 years to 80 years. Seventy years (in 38 dioceses) and 75 years (in 51 dioceses) are the most commonly designated mandatory retirement ages, while 65 years (in 68 dioceses) and 70 years (in 36 dioceses) are the most commonly designated optional retirement ages.

### **B. Pension Benefits**

One hundred thirty-three dioceses report having some form of pension plan for retired priests. The amount of monthly benefit varies among dioceses on a range from \$200 to \$700. The current average benefit is close to \$400 per month.

A wide variety of adjustments exists where the monthly pension benefit is linked to living and other arrangements. To quote directly from the Jenne study:

In most dioceses, if a priest resides in a rectory or diocesan institution (clergy retirement home or other diocesan home) a percentage of the pension goes to the place of residence. If a priest is living in his own home or apartment, he receives the maximum pension.

In some dioceses, the monthly pension is determined according to years of service. . . . There is usually a stated maximum amount.

In some dioceses, the monthly pension is dependent upon the age of retirement, e.g., at age 70 maximum amount and declining scale at an earlier age.

In addition to a money amount, many dioceses provide other benefits. Most have some type of medical insurance—Blue Cross, Blue Shield, Major Medical and reimbursements for Medicare. A few dioceses also provide for car and life insurance, oral surgery, nursing home care, all doctor bills, therapy and retreat and workshop costs.

The main sources of funds for diocesan pension plans are the parish or institution to which a priest is assigned, an annual diocesan collection and contributions by the priest himself.

### **C. Housing and Living Arrangements**

Thirty-four dioceses report that they have a residence available for retired priests if they choose to live there. Other options available are private homes and apartments, chaplain's residences, mobile homes and homes for the elderly. Several dioceses commented that the retired priest could reside in a rectory of his choice but *not* in the parish of his last assignment. Among retired priests, the most frequently available and most popular choice is their own home or apartment.

### **D. Continued Ministry**

The phenomenon of continued ministry after retirement is universal. All of the dioceses reporting indicate that their retired priests are involved in a wide variety of full and part-time ministries. The level of involvement ranges from saying Mass daily to remaining fully active in ministry. The ministries which emerge as the most popular are part-time parish work, sacramental ministry, visiting hospitals and the elderly, chaplaincies and spiritual direction.



## **E. Pastoral Services for Retired Priests**

Twenty-four dioceses report that they have a delegate or vicar for retired priests. Of these, only three vicars are full time in this ministry. The vicar is charged with responding to the physical and pastoral needs of the retired clergy, maintaining diocesan communication with the retired priests, as well as organizing some form of retirement preparation program.

## **F. Pre-Retirement Program**

Thirty dioceses report having some form of pre-retirement or retirement preparation program. On closer analysis these programs are often informal and individual in nature, and only eight dioceses consider their programs comprehensive. There was a high level of interest expressed in this area, and many dioceses are actively studying the possibility of initiating such a service for their priests.

A final observation in the Jenne study relates to the reaction of priests to the diocesan retirement program. Sixty-five dioceses report the reaction of their priests as "positive," 65 report a "mixed" reaction, and only two indicate a "negative" reaction. It was noted, however, that these estimates of priests' reactions were the subjective judgments of diocesan officials.

Father Jenne concludes from his study that the implementation of the Catholic Charities Institute recommendations was still "very much in progress"; that the vast majority of dioceses "have revealed a very real concern about the welfare of their retired priests"; and that "many dioceses could use some type of assistance in developing and implementing their pre-retirement and retirement programs."

## **RELIGIOUS COMMUNITY RETIREMENT**

The Jenne study focuses exclusively on the retirement of diocesan priests. In the spring of 1976, Brother John D. Olsen, C.F.X. surveyed all of the dioceses and religious communities of the country concerning religious retirement programs. The results were published as an NCEA publication<sup>6</sup> entitled, "Retirement Programs for Religious in the United States." The diocesan survey revealed that a high percentage of dioceses provide health care and retirement benefits to the religious currently employed.

Only a small percentage (25% or less) of the dioceses shared the cost of federal social security payments or made contributions for past services. The funds for religious retirement benefits come mainly from employer contributions with only a fraction (1/10) coming from special collections for fund drives. Of the men's religious communities surveyed, over 2/3 have established retirement plans and pension funds, but only one community in every four has elected to participate in the federal social security program.

The Conference of Major Superiors of Men has been active in organizing seminars and workshops for their retirement and personnel directors. They have published the proceedings of their 1977 Workshop conducted at Georgetown University under the title, "Completing a Vocation: Retirement and Religious Life."<sup>7</sup>

Among religious, questions of housing and pension benefits take on different dimensions from those of diocesan priests. The community's responsibility of providing housing is much more pressing than is the diocesan responsibility. There is only the beginning of an experience of independent or small group living among communities. Many religious have lived in large communities and their retirement expectations and needs often are best met in the setting of a larger community.

Religious communities have done extensive research on the benefits of incorporation in social security. After actuarial studies, communities must determine the feasibility and advantages of paying substantial amounts to the government to bring their entire community into the system. The financial pressures created by retirement and geriatric care costs are very severe. Some communities are beginning to explore the advantages of cooperation with each other in providing adequate preparation for and care during retirement.

One very significant development among communities is the amount of attention that is given to pre-retirement planning. The most popular form of planning—called "life-work planning" originated among and has been developed by women's religious communities. Increasingly, men's communities are organizing the same form of service for their members. In some instances, life-work planning seminars are organized cooperatively. The life-work planning seminar assists religious in identifying their personal and professional strengths, and on the basis of this analy-

sis, plan the form of ministry they wish to assume or continue during their final years.

There has been some recognition recently that the retirement problems facing diocesan priests have many parallels among the religious communities. For example, the need for residential and geriatric care facilities is similar. Religious communities are discovering that many of their members have forged close bonds with the local Church and they would rather spend their retirement years in the area where they actively ministered.

## **SECTION II—ANALYSIS OF THE EXPERIENCE**

The dozen years of experience and development summarized here present an interesting example of the practical implications of the pastoral directions set by Vatican II. These bare facts, however, need analysis and comment for their true import to be appreciated. The data made available by the Jenne study will be combined with observations that come from the experience of those who have been working actively in the field of clergy retirement.

### **A. The Elements of a Retirement Program**

While clergy retirement programs had no precedents to go by, they have begun, by trial and error, to define the limits and construct the framework for comprehensive services to aging and retired clergy. The Jenne study had identified and described five specific elements:

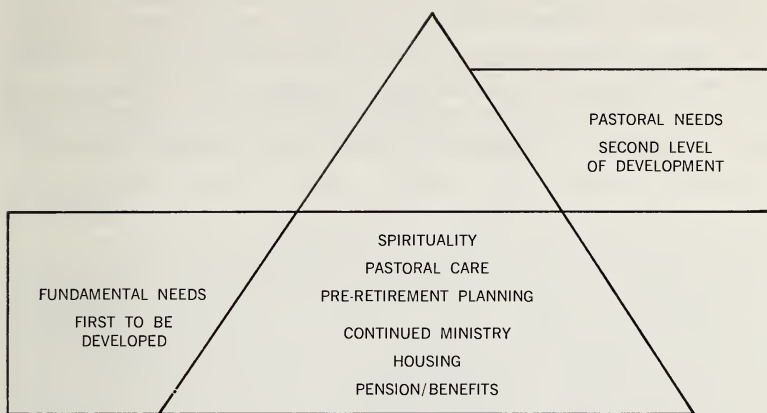
1. Pension and Benefits
2. Housing
3. Continued Ministry
4. Pre-Retirement Planning
5. Pastoral Care for the Retired Priest

There is another element not included in the statistical data that is beginning to emerge as a central issue in retirement conferences and discussions. That element is the spiritual development of aging clergy and religious. This sixth element of spirituality needs to be added to the five above, not only to make any analysis comprehensive, but the spiritual dimension is what gives the distinctive character to the entire experience.

These six elements constitute a comprehensive retirement program. The first observation about these six elements is their relationship to each other. They range from the most practical (pension) to the most important (spirituality) issues. This range suggests a particular arrangement of these elements. Abraham Maslow, in his theory of the hierarchy of human needs, maintains that it is necessary to respond to the elemental human needs of sustenance and shelter before the higher level social and spiritual needs can be addressed. It is possible, then, to display the relationship among the six elements of a clergy retirement program in the same hierarchical fashion that Maslow utilized to define human needs in general, starting with the fundamental elements and rising to the more significant.



It is possible to carry the analogy of the hierarchical relationship of these elements one step further. Maslow maintains that higher level social or personal needs only assume importance when the more basic survival needs have been satisfied to some degree. This truth seems to be borne out in the data gathered in the Jenne study. Most dioceses have been very active for several years in providing pension benefits, housing arrangements and continued ministry opportunities. Issues such as pre-retirement planning, pastoral care for the retired, and spiritual growth are only beginning to surface as primary developmental considerations. Again, building from the former graphic representation, this phenomenon could be described in this manner:



What this analogy and these representations suggest is that dioceses and communities need to invest considerable resources in providing for the fundamental needs of their retired clergy but that retirement programs cannot be confined to fundamental needs. More personal and pastoral dimensions become obvious as the program develops. This developmental sequence might provide communities and dioceses with some standard or indication about the direction or future development of their own programs.

This schema also provides a convenient outline for further, more detailed consideration of each of the elements in the retirement program.

## **B. Fundamentals of the Clergy Retirement Program**

The three fundamental elements of the clergy retirement program—pension, housing and continued ministry—correspond to the most basic needs of priests—the need for financial support, a home to live in, and the opportunity to remain an active priest. Each of these elements has developed in a very distinctive manner and merits closer attention.



## 1. Pension Funds and Benefits

The existence of a large number of trust and pension funds and annuity programs represents a significant financial investment by the dioceses and religious communities of this country. The management of these funds, which are growing in number and size, presents an increasingly complex set of problems to the Church. Conscientious stewardship will demand that dioceses begin to evolve investment policies to govern and control their investment activity. Two specific areas of policy development come to mind: one relates to the fiscal soundness of investments, and the second to the ethical soundness of investments. Some Church funds in the past have been vulnerable to irresponsible and speculative fiscal advice. While no investment enterprise can ever be guaranteed success, there are canons of orthodoxy, even in the world of finance, that represent reasonable advice. The responsibility of being sensitive to the ethical and social justice dimensions of investment policy is even more pressing. There are a growing number of Catholic and ecumenical groups which offer advice, not only on the morality of certain types of investment, but which encourage the use of investments to bring about more equitable or just responses from corporations.

The Church is a relative newcomer in the field of private pensions. The recent experience of some of the older pensions may be helpful in planning future growth. Private pension systems of industry, unions and local governments are finding it increasingly difficult to meet their obligations. Two factors have been especially detrimental to the funds—a constant rate of inflation and extended life expectancy of retirees. Many industrial and local government pensions are linking their systems with that of the social security system because they could not invest the increasingly large premium amounts needed to keep their pensions sound. The same type of phenomenon could develop with the clergy pension systems, especially if the median age of priests keeps rising and fewer young men enter the priesthood.

Clergy pension benefit systems that combine a diocesan fund with social security payments need to be established with care and equity. The clear advantage to inclusion in the federal social security system is that the benefits increase in proportion to the cost of living. Caution is required, however, since inclusion in the system is still a matter of personal choice by each priest.

Benefits are paid out on the basis of the amount contributed to the system during working years. Those who pay a higher level of contribution will receive a higher level of benefit. Diocesan systems, which reduce a priest's benefit from the diocese because he receives a larger payment from social security, may be penalizing the priest unfairly. He had to pay more into the social security system than his fellows, and he receives a smaller benefit from the diocese. He is doubly penalized.

## **2. Housing**

It has been reported above that the most popular choice of housing by retiring priests is their own home or apartment. Allowing an option for this type of living arrangement is affirmed as one of the true benefits of the retirement program. The fact that so many priests wish to live in their own home or apartment is somewhat surprising given the historical fact that priests have been provided full domestic service in rectories throughout most of their ministry. Perhaps the need for independence and privacy are strong motivating factors in this instance.

In addition to the option or choice of private residence, the need for different forms of residential care, whether provided in group homes or rectories, is growing. In the past nine years, 34 dioceses have constructed or established retirement residencies for clergy. While the Jenne study did not determine the level of care being provided by these residencies or the cost, it can be safely assumed that most residential care must be subsidized financially by dioceses. This subsidy is above and beyond any direct retirement benefit paid to priests. The cost of domestic service is rising. More critically, the cost of residential care is extremely high if it provides nursing or geriatric services. Some cost conscious dioceses and communities are attempting to separate residential care facilities from geriatric and nursing care units. Several dioceses and religious communities are testing out the advantages of cooperation in this area by combining diocesan clergy and religious in the same geriatric care unit, or by having both groups affiliate with a larger nursing care facility or hospital.

The need of diocesan financial subsidy for some retired priests presents a policy and equity problem. Even where priests in diocesan residencies make some payment for care, it is seldom

enough to cover all of the actual costs of care. In effect, the priests in the diocesan residence are receiving more benefits than those who choose to reside in their own home or apartment. Based on its own unique experience, each diocese needs to develop concise, well-publicized and equitable conditions for acceptance into residential care facilities. In all cases, fairness would demand that acceptance into subsidized facilities be based on an objective assessment of personal, physical and financial needs of each priest.

### **3. Continued Ministry**

It was noted in the introduction to this paper that the term "retirement" has taken on a distinctive character among Catholic clergy. What is especially distinctive is the high level of continued ministerial service among retired priests. The location of the ministry may change, the administrative responsibilities accompanying the pastorate are laid aside, and the actual number of work hours may diminish somewhat, but the fundamental priestly ministry continues. In contrast to the retirement experience in other fields, priests generally do not leave the work force. Many function at a diminished pace and exercise more freedom of choice about the form of ministry they pursue. What seems to be developing is a unique expression for the final phase of ministry, and not retirement in the classic sense of that term.

The shortage of ordained clergy has become a fact of contemporary Catholic life. On occasion, it is suggested that one of the means of alleviating this shortage is the elimination of the retirement privilege for priests. Given the already high level of ministerial involvement of retired priests, the gain from the elimination of retirement would probably not be that great. In the long run, this suggestion would be detrimental to the health and morale of the clergy and thus hardly be worth the additional ministerial service it would provide.

### **C. The Growth and Development of Retirement Programs**

As noted above, when the fundamental elements of a retirement program are in place, operating and being refined, a second level of concerns emerges. They are concerns that are less well-defined but they do cluster around a more pastoral and per-



sonal perspective. They relate to the opportunity for and assistance in planning for retirement, to the pastoral care of those retired, and to the distinctive spirituality of the senior priest. The clergy retirement movement seems to be at this second level or stage of growth at this time.

## **1. Pre-Retirement Planning**

Many dioceses and religious communities are simultaneously searching for methods of preparing their priests for retirement. While many dioceses and communities prepare their priests through individual counseling advice and support, few have developed an adequate approach to this need. Information and experience with various models are being eagerly sought. What is being discovered is the fact that pre-retirement planning, in order to be successful, is not just an end-of-life process but a life-long process. Planning and development throughout one's ministry are necessary. Three distinct and complementary approaches to life-long planning can be identified.

The approach pioneered and developed by religious communities is the "life-work" planning approach. Life-work planning is a process that can be entered into at any phase of one's ministry and can be profitably repeated or refined over the course of one's ministry. It is essentially a process of identifying, in a very systematic fashion, one's ministerial strengths and limitations. This functional self-analysis, which can easily be linked to a spiritual discernment process, enables a priest to make choices about continuing education or alternative ministries. If sensitively administered, it can diminish the trauma or difficulty of a priest as he chooses a particular ministry he wishes to pursue after retirement.

Another approach to the retirement planning question can be made by the implementation of certain personnel policies. For example, a clergy personnel policy which encouraged voluntary participation or required mandatory participation in the diocesan pension fund would begin long-range financial planning for each priest. Or again, a diocesan policy which required priests to undergo medical and dental checkups on a regular basis would be long-range health planning. Even policies such as term of office for pastors can indirectly support a planning approach.

A third approach to retirement planning and the one most

commonly referred to is the retirement preparation program. Usually this is a program offered to priests who are within several years of retirement age. It can be conducted individually or on a group basis. It can be highly structured or very informal. In most cases, it attempts to assist a priest in making some of the practical decisions about his retirement far enough in advance so that he can plan intelligently for his transition from active to retired status. Where will he live? Can he support himself? How will he remain active? In its best expression, such a program will also confront some personal issues such as the emotional-psychological trauma of transition, the fear of growing old, or problems of self-esteem.

The question arises—who is responsible for organizing or structuring a pre-retirement program? The assignment of the responsibility could fall to one of several different agencies within a diocese—the Clergy Personnel Board, Continuing Education, the Chancery, the Senate of Priests, a Consultation Center. Ideally, a pre-retirement program would be the result of a collaborative effort of some or all of these agencies. Each of the agencies has a particular competence to bring to bear and none can work in isolation from the others in this area. The Clergy Personnel Board might well recommend a policy which promotes retirement planning, but Clergy Education or a Consultation Center may have to provide the technical or professional competence necessary to carry out an adequate preparation program.

## **2. Pastoral Care for Retired Clergy**

As the number of retired priests grows, so, too, does the need to provide pastoral care for them. Several dioceses have established the position of vicar for retired clergy to render this care. It is the vicar's responsibility to maintain communication with the retired priests through personal visits, by phone, and through newsletters. He is to insure that they are included in all diocesan activities and programs, and even that they are afforded some privileges. He assists in finding ministerial opportunities. Several vicars are charged with the responsibility of developing and implementing the pre-retirement program.

One factor determining the need for a formal pastoral care program is the size of the individual diocese. Smaller dioceses tend to have a much stronger personal support system and less

need for a formalized care system. But whether or not there is a formally organized pastoral care system, every diocese can express its genuine pastoral concern by encouraging active participation by the retired priests in the full life of the diocese. They can participate in the collegial structures of a diocese, can be explicitly invited to attend all clergy education activities (often free of charge) and can be given positions of prominence and honor in diocesan liturgical celebrations.

### **3. Spirituality**

It is a truism to say that the ultimate goal of the dedicated priest is his spiritual development. Spiritual maturity, more perfectly reflecting the life of Christ, is the motivation underlying ministerial activity throughout life. It is only in recent years that there has been some attempt to link spiritual development with personal and psychological development. Is there a spirituality or level of spiritual development which is unique to the retired or senior priest? Further reflection and thought may clarify some distinctive dimension of spirituality that is based on aging. But whether spirituality is age-based or not, it is becoming apparent that retirement can provide a set of conditions, can create a setting, that is particularly conducive to significant spiritual development.

A more leisurely pace of life creates an ideal atmosphere for prayer. Meditation and reflection have an enormously rich source to draw upon in all of the ministerial and pastoral experiences of the retired priest. Feelings of gratitude for the gifts of life can find a unique expression in the Eucharist, the great prayer of thanksgiving. Even the current liturgical practice of concelebration could provide an experience of unity in priesthood and closeness to one's brother priests that could serve as the most effective deterrent of isolation and loneliness. The aging process brings with it its own distinctive asceticism. The inevitability of having to live within certain physically or socially imposed limits is well-known. Its value may be more apparent to the priest who has reflected often on Christ's words to Peter after the resurrection predicting the limits which Peter would experience in his old age and which indicated "the kind of death by which Peter would give glory to God." (Jn. 21:18-19)

Scriptural models and parallels could be multiplied, but for

the purposes of this discussion, it should be noted that there is a rich spirituality that is already developing among the community of retired clergy and religious. The benefit of this developing heritage will be felt far beyond the clergy and religious themselves and may eventually prove to be a rare gift from them to us.

## **SECTION III—THE FUTURE OF CLERGY RETIREMENT**

Up to this point, this report has focused its attention on the history of the clergy retirement movement and has provided some analysis of current programs as they now exist or are being organized. This accumulated experience does, however, suggest that there are some areas that need reconsideration. Two of these areas will be discussed here—one is the policy question related to the mandatory nature of retirement, and the second is an effort to ground the retirement question in scriptural, pastoral notions rather than in purely administrative or managerial ones.

### **A. Mandatory Versus Optional Retirement**

A recurrent theme which surfaced in the course of this study was the debate surrounding the mandatory versus the optional nature of clergy retirement. It has already been observed that one of the constantly affirmed positive aspects of the retirement experience is the opportunity afforded to priests to choose where they wish to live and to what extent they wish to minister. In contrast, the overwhelming majority of dioceses have a mandatory retirement age. The policy that a pastor must retire at a designated age is a significant development from the "voluntary resignation" because of inability to serve suggested in the Vatican documents.

The widespread practice of a mandatory retirement age policy may indicate that the American Church was adapting, consciously or unconsciously, the industrial and government model of retirement. Until recently, it had been the almost universal practice in industry and government to stipulate a mandatory retirement age. The rationale for any retirement policy was threefold: 1. it was a reward for service rendered; 2. retirement assured the system that the older, less productive (and probably higher



paid) employees would leave the system; and 3. retirement assured that there would be room in the system for younger, more energetic workers. The mandatory nature of retirement assured that the last two goals would be achieved.

When retirement was introduced into many dioceses, especially mandatory retirement, it often had a punitive connotation. For many years, no matter how loudly or sincerely diocesan authorities professed that retirement was a reward for faithful service, it was perceived as a punishment and experienced as a rejection. This pejorative connotation is fading but the negative overtones of mandatory retirement still remain strong.

There is some basis for the perception that clergy retirement is punitive. When some retirement programs were introduced, retirement was used as a method of solving all types of difficult personnel problems. Especially where a diocese had no form of objective evaluation or accountability system, there was a strong temptation to use retirement as the method of responding to older priests who were unprepared for and resistant to Church renewal efforts.

Perhaps the time has come to question the wisdom of maintaining a mandatory retirement policy. Society, in general, is turning away from the mandatory concept. It is close to being legislated out of government service and it may not be long before the private sector follows suit.

There already exist several optional elements in the current retirement plans of many dioceses. Choice of housing and choice of ministry are optional more often than not. Choice in the question of retirement age would complete the optional nature of the program. If it is true to say that retirement for priests will never be perceived as a reward as long as it is forced, then it might be well to determine that the distinctive feature of a clergy retirement program will be its complete optional nature.

There are risks involved in moving toward a completely optional retirement program. The most obvious risk is the possibility that priests might construe an optional policy as an encouragement to retire early. A spate of early priest retirements would adversely affect the actuarial soundness of many pension funds, but, more importantly, it would worsen the already critical shortage of ordained priests. A second risk would be just the opposite case.

A priest may wish to stay in a pastorate or key administrative position even after his physical energy and mental alertness would require that he seek a less demanding and more pastoral position.

Each of these risks raise valid cautions about proceeding with a completely optional program without at the same time re-examining the very nature of clergy retirement as it is presently experienced. There can be implicit assumptions in the current experience that see retirement as the end of something vital (and thus unattractive to older priests), or that see retirement as a refuge from the increasing demands of contemporary ministry (and thus too attractive to the disgruntled or overworked middle-aged priest). There is a need to reassess the foundations upon which clergy retirement is built. As *One Who Serves* has already asked some of the pertinent probing questions about retirement<sup>8</sup> and has suggested a posture of constant re-examination of retirement programs. This paper continues in that vein by suggesting consideration of a new model for clergy retirement.

## **B. The New Model**

At the outset, this paper alluded to the problem with the use of the word "retirement." In the light of the review and analysis of the developing clergy retirement experience, it may be timely to suggest the adoption of a different model for aging within the ministry and a different vocabulary or term to identify the experience.

In place of the classification of "retired priest," each diocese and community could establish the position or office of "senior priest." A senior priest would be one who had begun a process of gradual relinquishment of major administrative responsibilities along with a concurrent assumption of a more distinctively pastoral role within the diocese or community. The responsibility for developing and implementing this new approach or classification would fall not only to the administrative leaders of dioceses or communities, but to each individual priest as well. The diocese would need to develop the role. The individual priest would need to develop himself. This division of responsibility between diocese/community and each priest provides a basis for the further discussion of this new model.

## 1. **Diocesan/Community Responsibility: Establishing the Role of Senior Priest**

There are numerous recent instances of the creative introduction of new roles and functions within the ministry. The permanent deacon, the ministerial associate, the team ministry—all are offices or administrative constructs which were developed to respond more effectively to current pastoral needs. The creation of the role of senior priest can be viewed as mutually advantageous to priests and people alike.

### a. **Scriptural Background**

It is clearly not within the competence of this report to provide a scholarly presentation of the scriptural basis of ministry. The use of scripture here is more an effort to use scriptural notions or ideas in an accommodated or applied sense.

Among his many pastoral admonitions to Timothy, St. Paul uses a phrase that might serve as a starting point or a thematic statement for the consideration of the special unique position of senior priests:

The elders who do their work well while in charge are to be given *double consideration*, especially those who are assiduous in teaching and preaching. (1 Timothy 5:17)

There is no exact parallel between the notion of elder and senior priest. The elder in the Pauline Churches was to serve as God's representative; he was to be teacher, presider and one who through his acknowledged good character would draw the people together. However, the double consideration that Paul is suggesting as the due of the active minister certainly applies to the man who has completed his active ministry. The senior priest in the applied sense here suggested, would be a man who has served his people well and selflessly, who has matured in his own spirituality, and who is, at the same time, beginning to experience some of the limitations on his physical capacity due to advancing years. Such a priest should be given "double consideration."

### b. **The Position or Role of Senior Priest**

This position would be distinguished by the presence of the elements summarized in the first sections of this paper. The

senior priest would enjoy financial security and needed medical care, and a full range of options for living and continued ministry. He would be free of administrative responsibilities to the extent he found desirable. He not only would be afforded a place of honor at liturgical and social functions, but he would at the same time be the object of special pastoral concern for the local bishop.

Establishing the senior clergy in a position of privilege or "double consideration" while, at the same time, avoiding a paternalistic or demeaning attitude, requires a fine sense of balance. It is difficult to respond in a balanced fashion to a man's need for security and his need for dignity. It may be possible to care for a senior priest's physical and residential needs without embarrassment to him when it is clear that what he is receiving he has a right to receive. If the position of senior priest were established, if its prerogatives were defined, if entry into it were optional, priests might look forward to it with a heightened expectation.

### c. **A Call to Continued Service**

The continued ministerial involvement of the senior priest in the life of the community would be a particularly critical element of this position. A senior priest should not be given "busy work" or used to perform work other priests find unattractive. His desire to perform a certain ministry should be equally weighed with his ability to perform and the opportunity or availability of the ministry.

The weighing of desire, ability and opportunity should result in the issuing of a "call" to the members of the senior clergy to serve in particular ministries. The notion of "call" is important not just because it makes a priest feel needed or offers a sense of direction to his continued ministry. It does both of these, but, more basically, the "call" of the priest by the Church community has a profound spiritual value for him. His initial enthusiasm and service was a response to a call; his continued ministry can be the same. To minister in order to keep busy has some survival value. To minister in response to a call has immense personal and spiritual value. *As One Who Serves* makes this point explicitly when it states: "The realization by a retired priest that he and his ministry are still needed by the



Church often means much more to him than any program which simply guarantees material security.”<sup>9</sup>

## 2. Individual Responsibility: Growing into the Position of Senior Priest

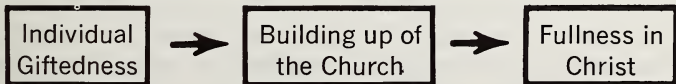
No restructuring of the ministerial experience is possible without the active and enthusiastic cooperation of priests themselves. Establishing a position such as that of senior priest would be a futile gesture unless priests themselves were committed to a pattern of growth and development which unfolded throughout their ministry and reached its fullness in old age.

### a. Scriptural Basis

In his call to unity in Chapter Four of the Letter to the Ephesians, St. Paul writes:

Each one of us has been given his own share of grace, given as Christ allotted it . . . and to some, his gift was that they would be apostles; to some, prophets, to some, evangelists; to some, pastors and teachers; so that the saints together make a unity in the work of service, building up the body of Christ. In this way, we are all to come to unity in our faith and in our knowledge of the Son of God, until we become the perfect man, fully mature with the fullness of Christ himself. (Eph. 4:7-13)

What is particularly pertinent about this passage is the developmental sense of ministry that it offers. Ministry begins with the individual giftedness of each person; it is worked out by building up the body of Christ, the Church; it is terminated by coming to fullness in Christ. In contemporary terminology, the passage describes a “flow” that can be illustrated in this manner:



If there is any validity to the developmental sense of this passage, it provides a scriptural schema for looking at ministry as a growth experience. The particular emphasis of this schema is not the *function* which the minister performs but the *person* of the minister. It is the person who is gifted, the person who

grows, and ultimately, it is the person of Christ that becomes the goal of individual growth.

## **b. Ministry as Growth**

Translating this scriptural schema into practical terms, with particular reference to clergy retirement, a priest's entire ministry ought to be a passage or process building up to the final and most fulfilling phase of ministry. Early years of ministry should emphasize the identification and development of unique gifts and talents. The productive and energetic years of ministry should be a conscious effort at building and unifying the Church through service. But the final phase of ministry is the time that sees the person of the minister transformed into Christ.

Any pre-retirement plan ought to prepare a priest for the final and most fulfilling phase of his ministry. Preservation of health, a wide variety of ministerial experiences and sustained spiritual growth will make the final phase even richer. Laying aside administrative responsibilities should be perceived not as a loss of prerogative but a necessary step in taking on a more important identity. The minister who has developed, who has grown in Christ, becomes a unique treasure and resource for the whole Church. He becomes one who more perfectly reflects Christ. He is esteemed because he embodies the aspiration of the whole community, oneness in Christ. It is not his memory which makes him precious, but his vision; not what he remembers but what he sees.

## **CONCLUSION**

This paper has attempted to summarize the past accurately and to suggest a direction for the future. Its central conviction bears repeating. Clergy retirement can never be a satisfying experience if it is viewed as an end of life process. Growing and aging in ministry takes on meaning and significance when it is viewed as a passage that culminates in a period of deepened and reflective service.

Any change in the future will require a shift in attitude. Modifying the current Church structures of clergy retirement cannot be done without a new sensitivity to senior priests as a rich ministerial resource. Senior priests need to deepen their

sense of call to a unique pastoral ministry to the entire Church community. That community would be enriched if all priests, unafraid to pass gracefully to newer, more demanding roles of dedicated service, would experience the passage through ministry as one of growth to the fullness of the Lord.

## RECOMMENDATIONS

The Committee on Priestly Life and Ministry submits the following recommendations based on its research and discussions. They are addressed to local Churches to assist them in improving the quality of their own clergy retirement programs.

To local Churches, it is recommended that each diocesan clergy retirement program be as comprehensive in nature as possible. While local conditions and customs will determine the final structure and form of the program, the following elements merit consideration:

1. **Spirituality**—When planning clergy retreats and prayer days, special programs uniquely designed by and for senior priests could be considered. These programs might include prayer and reflection experiences for senior priests focusing on their “growth in fullness” in the Lord. They might also include prayer and worship experiences conducted by senior priests, allowing them the opportunity to share the fruit of their spiritual ministry.

2. **Pastoral Care**—Depending upon the number and special needs of their senior priests, local Ordinaries should consider assigning diocesan personnel to serve as vicar for senior priests. This position might be an especially attractive one for a priest who is himself interested in diminishing his parish administrative role and seeking a new pastoral role. It would be the vicar’s responsibility to express the genuine care and concern of the local Church to the retired priests, to maintain communication, to assure active participation in priestly and diocesan activities and to respond to any unique or pressing pastoral needs of the senior clergy. These services can be rendered on a part-time basis or through a directive from the Ordinary to his administrative services to be particularly sensitive to their contacts with and inclusion of senior clergy.

3. **Continued Ministry**—One of the privileged features of

senior priest status should be greater freedom of choice of ministry. The Ordinary and the local Church can assist a priest in making his choice and discovering his new call by keeping him informed of the pastoral needs of the diocese, by offering career counseling services at various points throughout his ministry, and by providing re-training for a new ministry where required. The Clergy Personnel Board might be given a special charge by the Ordinary to assist in placing senior priests in ministries that correspond to genuine pastoral needs.

**4. Health Care**—Retired clergy should enjoy sufficient medical insurance coverage to provide both normal health maintenance and major medical needs. Since it is inevitable that some aging priests will need geriatric or extended institutional health care, each diocese should make provision for this type of medical care. Because this type of care is extremely costly when rendered to a small population, dioceses should actively pursue cooperative efforts with larger health care institutions such as hospitals or nursing homes and with religious communities of men and women wishing to provide similar care to their aging and disabled members.

Maintenance of “well health” among the aging clergy is impossible without active concern for the health of younger priests. Each diocese and community might consider some form of preventive health maintenance program for its clergy such as a required annual physical examination.

**5. Housing and Living Arrangements**—A comprehensive program would allow each priest a series of options for different forms of housing and living arrangements. The choice of living in one’s own home or apartment, within or outside of the diocese, combined with options relating to rectory or institutional living, would constitute a well-balanced set of alternatives.

Many dioceses and communities have found it necessary to develop group retirement homes or residencies for their clergy. Should a diocese choose to provide residential care for some of its clergy, it should be organized in such a way that those priests not eligible for or interested in residential care will receive equitable treatment from the diocese. A clear and fair policy on eligibility for residential care may need to be developed.

**6. Pension Benefits**—Each diocese and community should

develop an actuarially sound plan for providing future retirement benefits to their retired clergy. Any realistic benefit will include some escalation provision to compensate for the adverse effects of inflation. Given the increased mobility of priests among dioceses and between religious communities and dioceses, some consideration should be given to the inter-relationships among different pension systems. Interchangeable portable vesting rights for each priest could be a feature of a diocesan pension system.

**7. Pre-Retirement Planning**—Each diocese and community should assist its clergy in planning for a fruitful retirement experience. Such planning can begin with the young priest, assisting him in making decisions about participation in the diocesan pension plan and social security, and about a health maintenance program that would include regular physical and dental checkups.

Individualized or group retirement planning assistance could be offered to older priests concerning such practical issues as choice of housing, continued ministry, legal concerns and income and investment advice. More complex issues such as psychological adjustment and spiritual growth might be treated with equal benefit.

**8. Cooperation between Dioceses and Religious Communities**—Local Churches are urged to begin discussions with major superiors of religious communities on common problems and potential areas of cooperation. The issues that immediately suggest themselves for consideration are shared geriatric care facilities, common policies, and the development of the spirituality of the aging.

**9. Investment Policy**—Local Churches having pension or trust funds may need to develop investment guidelines to control the type of investments made by their funds. Policy guidance is needed, not only on the nature of fiscally sound investments, but more importantly on the social justice implications of investments.

**10. Assistance Available**—Local Churches, wishing to expand or improve their own retirement programs, might call upon the following organizations who have already demonstrated some interest and competence in this area:

- the National Organization for the Continuing Education of the Roman Catholic Clergy (NOCERCC)



- the National Association of Church Personnel Administrators (NACPA)
- the Center for Aging at the School of Social Work, Catholic University of America
- the American Association of Retired Persons

The members of the Committee recognize that the above recommendations are not equally applicable in all dioceses or communities. They are submitted with the hope that they will evoke even more creative and particularized responses from those who are charged with the care of the senior clergy.

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9. *Idem*.

**Part II**

**A STUDY OF  
PRE-RETIREMENT AND  
RETIREMENT PROGRAMS  
FOR DIOCESAN PRIESTS**

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# Chapter I

## RESEARCH PROBLEM

### A. Statement of the General Problem Area.

The general problem area considered in this research paper is that of pre-retirement and retirement programs for diocesan priests.

### B. Purpose and Relevance of the Study.

#### Background Information

The selection of this topical area came about as the result of a conversation between this writer and Fr. Vincent Mainelli, Associate Director for Convening of the National Conference of Catholic Charities (NCCC). Fr. Mainelli stated that in January of 1969 the NCCC sponsored an Institute on Planning for the Pre-Retirement and Retirement of Priests. The planning and programming for the Institute was based in large part upon the response to a questionnaire sent to some 3,500 Diocesan and Religious Priests in various sectors of the country. The Institute was the first of its kind for priests to be held in the United States. To date, there has not been a follow-up study or any research conducted to determine whether the recommendations that were presented during the Institute were actually implemented in the Dioceses or Religious Communities. Therefore, Fr. Mainelli suggested that it would be very valuable for the purposes of future planning of the NCCC to research this area and to determine just what has taken place by way of implementation during the last eight years.<sup>1</sup>

Fr. Mainelli also suggested that this writer contact Msgr. Colin MacDonald, Executive Director of the Bishops' Committee on Priestly Life and Ministry of the National Conference of Catholic Bishops (NCCB), to determine whether the Committee would be interested in cooperating in this research project. Msgr. Mac-

Donald stated that his office receives many requests for information regarding pre-retirement and retirement programs. Often the information is not available and inquirers are referred directly to the dioceses. The information obtained in this study will, therefore, be of much value to the Committee in responding to requests and in the formulation of recommendations to the NCCB.

Msgr. MacDonald and Bishop Raymond Gallagher, the Committee Chairman, both gave full support and invaluable assistance to the execution of this project.

### **Relevance for Priests**

Priests have dedicated their lives to the service of others. It is of considerable importance that, as these men approach retirement age, adequate programs be implemented to assist them both in planning for retirement and in actually living out that period of their lives to the fullest. It seems that a healthy, positive attitude on the part of priests toward retirement cannot but touch the lives of the people they serve.

Hopefully, the information collected in this project will contribute to the well-being of those priests who are already retired, those men contemplating retirement in the near future, and that it will serve as a valuable resource for those who are in positions of planning pre-retirement and retirement programs in the various dioceses.

For the purposes of this study, the research question has been limited to a consideration of pre-retirement and retirement of *diocesan* priests. Thus it does not include a consideration of what has taken place in regard to priests who are members of religious communities, i.e., Franciscans, Dominicans, etc.

### **C. Research Question Posed in the Study.**

The primary research question is: To what extent have the recommendations of the Institute on Planning for Pre-Retirement and Retirement of Priests, sponsored by the National Conference of Catholic Charities in 1969, been implemented in the Catholic dioceses of the United States?

#### **D. Additional Objectives.**

The additional objectives of this study are:

1. To determine to what extent the recommendations are known.
2. To determine if there is any plan and projection in the dioceses for the implementation of the recommendations.
3. To determine what plans and programs have been implemented in addition to those suggested at the Institute.
4. To determine if any research has been conducted on the diocesan level regarding the activities, needs, and attitudes of retired priests.
5. To consider any additional suggestions from the dioceses in regard to pre-retirement and retirement policies and programs.
6. To determine some of the independent variables that have impacted the extent of implementation of the recommendations in the various dioceses.

#### **E. Limitations of This Study.**

Prior to the Institute in 1969 some dioceses had already implemented pre-retirement and retirement policies and programs. However, we do not know which dioceses these were or what types of plans had been implemented. Some of the recommendations presented at the Institute may have already been in effect. Thus, it is difficult to assess the impact of the Institute as related to the extent of implementation.

Another limitation is that this study does not address the rationale behind the implementation or non-implementation of the recommendations. There may be many extraneous variables impacting the extent of implementation that have not been identified in this study.



## Chapter II

# REVIEW OF THE LITERATURE

The Institute on Planning for Pre-Retirement and Retirement of Priests was the “response of the NCCC to requests that it had received for help in developing services for older priests. The National Conference, realizing that little had been done in this area, accepted the challenge to sponsor the Institute.”<sup>2</sup> Its purpose was twofold: namely, “to make those who were responsible for planning for older priests aware of the comprehensive aspects that should be considered in a program . . . and to stimulate interest so that local or regional groups would carry on similar institutes.”<sup>3</sup>

As is mentioned in the preface to the proceedings of the Institute, “The Institute called for consideration of priests as persons with individual needs, their participation in the planning, a new orientation regarding leisure time, second careers and status-ship of pastors.”<sup>4</sup>

The speakers at the Institute were experts in their respective fields. Many of them made specific recommendations to the diocesan representatives who were in attendance.

Therefore, this descriptive study will focus on the following variables:

1. The recommendations.
2. Extent of implementations.
3. Knowledge of recommendations.
4. Implementation plan.
5. Other additional plans.
6. Diocesan research studies.
7. Additional suggestions.
8. Impacting independent variables, i.e., region of the country, number of priests.

Hopefully upon the completion of this study, we will be able to return to the priests themselves and determine their response to these programs of pre-retirement and retirement as implemented.

The literature review began with a thorough researching of the proceedings of the Institute. The recommendations have been extracted from the various presentations during the Institute and will be identified below. For the purposes of this study, the term "recommendations" will be defined as suggested courses of action. The recommendations were intended to be possible adaptations to fit the local situation and were not presented as official policy. Some of the recommendations are repeated by several of the presenters and for the sake of economy, they will be listed only once.

### **A. The Institute: Speakers and Recommendations.**

1. Bishop Gallagher<sup>5</sup> recommended: That provision for the financial security of the priest be made through social security and pension plan with some sort of subsidized benefit that would also be available if needed. Adequate physical arrangements should be made so that the aging priest will have a place of his own, geared to his particular needs and respectful of the privacy to which he is entitled. The aging priest's continued involvement in the ministry should be a planned program of retirement with graded steps and gradually diminishing activities as one increases in age. The diocese should provide the retired priest, if he so desires, a challenging and interesting though less-demanding program in the ministry.

2. Fr. Zuercher<sup>6</sup> recommended: That a positive change of attitude on the part of the clergy toward retirement will only come about as the result of an educational process reaching all Catholics. There should be a definite retirement policy, clearly stated, and followed. This policy would include financial programs as well as retirement from positions of authority—which should be demanded and accepted, with rare exceptions. He suggests that several options should be open to the retired priest concerning the place of retirement. A diocesan register and/or National Clearing House, listing opportunities for reduced involvement in the ministry, should be established. Every large diocese should designate someone (full-time, if possible) as the coordinator for



retired priests. The coordinator would interview each priest annually, at least five years before he reaches the retirement age.

3. Brother McDonough<sup>7</sup> recommended: That the development of workshops and retreats be utilized as an immediate preparation for retirement.

4. Dr. Smith<sup>8</sup> recommended: That the first principle in retirement planning be flexibility. There should be no absolutely mandatory retirement age. There should be an age set at which a priest can retire, somewhere in the late 60's. Also there should be an age where a priest should retire (even if he is not entirely willing to do so), somewhere in the 70's, unless there are mitigating circumstances. Those who are totally incapable of caring for themselves, totally disoriented, should be segregated to save them unnecessary embarrassment and indignity. Guidelines and provisions should be established to help the elderly plan how they want to spend their lives after retirement.

5. Fr. Kearns<sup>9</sup> recommended: As a man reaches pre-retirement age, around 50, there should be a gradual shifting of roles in the parish ministry. He could give up some administrative duties and develop his potential along the lines of working more closely with the people. There should be time for developing new interests, time for reading and writing. Time off for a sabbatical break periodically should be considered. A time to develop other interests should also be considered. He recommends some sort of career consultation or guidance program in the diocese to help a priest appraise his assets, reflect upon his career and plan for continuing development of his talents and to explore other roles. Upon retirement a priest should have a number of options as to new roles he might assume, i.e., part-time parish work as a senior assistant or chaplain. He should have opportunities for interpersonal relations with peers, other retired priests, and laity as well as with younger priests.

6. Fr. D'Arcy recommended: A National Inventory of retired priests coming from Washington, D.C., listing both available openings and available priests. Research would be conducted in regard to what older priests would like to do and what kind of activities they have engaged in after retirement and found satisfying and rewarding.<sup>10</sup>

7. Dr. Homza<sup>11</sup> recommended: That pre-retirement program-

ming stress the importance of each priest having a private physician and annual physical examination.

8. Fr. Fahey<sup>12</sup> recommended: That every retired priest be assured economic security and the right to make as many meaningful decisions about his life as possible. There should be several options available upon retirement in regard to housing. One of those options should include housing provided by the diocese. Retired priests should exercise ministries proportionate to their strength and talent. Their participation should be sought in clerical gatherings, formal and informal.

9. Msgr. Michelin<sup>13</sup> recommended: That various styles or modes of retirement living be developed, i.e., custodial, semi-custodial, and independent living. The possibility of retired priests living in apartment facilities for the elderly and available to the residents for Mass and consultation should be explored. Possible seasonal living arrangements should be developed.

10. Msgr. Healy recommended: That seminary training in preparation for orders provide definite concepts concerning retirement. Seminarians should make and keep an acquaintance with a retired person, a priest if possible, for visiting and for acquiring the feel for retirement and its special attitudes. After ordination and periodically through the years, the priest would benefit in readying for retirement by seminars on the aging process. There should be a retirement plan with the priest contributing annually to the fund as a personal investment. The man should be included in planning, directing, and making policies in the retirement program. Seminars to keep current through experts on social security, medicare, annuities, insurance, income tax, etc., as well as a newsletter for retirees should be offered. Arrangements for a wide variety of possible apostolates after retirement, full or part-time, live-in or out, to convents, institutions, nursing homes, etc., should be effected.<sup>14</sup>

## **B. Pre-retirement Programming.**

### **1. What is it all about:**

Pre-retirement education "is concerned with giving older people an understanding of the internal and external changes which take place as one grows older and retires from work, and recognition that they face these changes in common with many other

people.”<sup>15</sup> The programs are concerned with helping people “assess the aging process and to face up to the fact that there are both positive and negative aspects of living the later years as at all stages of life.”<sup>16</sup>

The development of pre-retirement programs is a recent one which “parallels closely the growth of pension programs following World War II.”<sup>17</sup> Larger industries tend to offer services more than smaller ones.

## 2. Types of Pre-retirement Programs.

There are basically two types of programs offered. “The individual approach by which the employee is invited to talk over with the employer such things as terminal pay and pension benefits,”<sup>18</sup> and, “the group approach by which a number of employees are brought together at one time to participate in retirement planning sessions.”<sup>19</sup> Very little is known about the origins of the individual type of program, although they can be traced back in many companies prior to 1950. An extensive survey of pre-retirement programs by Franke (1962)<sup>20</sup> found the individual approach to be most common. The origins of the group approach can be traced back also to the early 50’s to the “pioneering efforts of the University of Chicago, and to the University of Michigan.”<sup>21</sup> These first attempts were based, for the most part, on the premise that “people, as they grow older face certain crises or problems and that a fuller understanding of the problem situation should result in better adjustment during the later years.”<sup>22</sup>

Pre-retirement programs can also be categorized in another manner. Some authors speak of “limited programs” which do little more than explain the pension plan, the retirement timing options, and the level of benefits under various options and “comprehensive programs” which go beyond financial planning and deal with such topics as physical and mental health, housing, leisure activities, and legal aspects of retirement.<sup>23</sup>

The individual approach is usually associated with the limited program and the group approach as offering the greater potential for comprehensive pre-retirement planning.

The University of Michigan Preparation for Retirement Program is designed to help older people in a discussion group to:

1. Understand aging and the aging process.
2. Become aware of the situations which are likely to arise.
3. Make decisions about the best way to handle retirement situations.
4. Take steps ahead of time to prevent retirement problems from arising in the first place.<sup>24</sup>

Woodrow Hunter of the University of Michigan is considered to be the pre-eminent person in this developing field.

### 3. Research on Effectiveness of Programs.

William L. Mitchell, writing on this subject in 1973, observes that "surprisingly little research has been done on the effectiveness of training programs in preparation for retirement."<sup>25</sup> Studies by Burgess (1960) compared changes in attitudes towards retirement among 200 subjects who had participated in a pre-retirement program as against changes in attitudes among a matched group with no exposure to a program. The highest gains resulting from the study were in retirement planning, financial planning, retirement anticipation and retirement living. Only moderate gains, however, appeared in such categories as retirement attitudes, social adjustments and mental outlook.<sup>26</sup>

### 4. Pre-retirement Programs in Religious Communities and Dioceses.

This author's review of the literature turned up many pre-retirement programs currently being utilized in communities of Sisters. An interview with Sr. Mary Bush of the Sacred Heart Sisters here in D.C. proved most informative. The existent programs are for the most part, according to Sr. Bush, based upon the model developed at the University of Michigan by Hunter.<sup>27</sup> The Literature Review did not turn up any research studies on the effectiveness of these programs.

In regard to pre-retirement programs for diocesan priests, there is no mention in the literature. An interview with Msgr. Ritty<sup>28</sup> of the Cleveland Diocese was most helpful and verified the Literature Review. He, to the best of his knowledge, is the only full-time priest working exclusively with retired priests. He has attempted one pre-retirement group program in Cleveland for the men retiring in the next five years. Nineteen priests out



of a possible fifty were in attendance. He had been asked to present workshops in other dioceses in the Midwest. He is not aware of any organized pre-retirement programs for priests.

### C. Retirement of Priests.

#### 1. Major Church Documents.

While the retirement of priests is a recent phenomenon that can be traced back to the documents of the Second Vatican Council (1963-1965), it is important to note that the Church has always made provisions for infirm and disabled priests who were unable to function ministerially.

The Code of Canon Law (Canon 1429 § 2)<sup>29</sup> prescribed that the Ordinary could establish suitable provisions for retiring pastor or assistants from the income of the benefice from which they retire. However, this method could not be applied in the United States because there was no benefice system. Thus, the III Plenary Council of Baltimore (1884) stated that the bishop should obtain funds from the parishes the priests were serving as a means of providing them with sufficient support.<sup>30</sup> Moreover, the bishops of the United States were urged to "adopt as soon as possible a stable plan of social security for infirm and disabled priests."<sup>31</sup> At that point in time, retirement was a concept applicable only to those priests who were disabled and/or infirm.

On October 28, 1965, the Vatican Council Decree on the Bishops' Pastoral Office in the Church (*Christus Dominus*) was issued. This document states in part:

Pastors who are unable to fulfill their office properly and fruitfully because of the increasing burden of age or some other serious reasons are urgently requested to tender their resignation voluntarily or upon invitation from the Bishop.<sup>32</sup>

On August 6, 1966, Pope Paul issued his Motu Proprio *Eccllesiae Sanctae* which implemented the Decree *Christus Dominus*. This document is more specific about the age of retirement:

All diocesan bishops and others who hold equivalent juridical offices, when they complete their 75th year of age at the latest, are strongly requested voluntarily to offer their resignation from office to the competent authority who will make the final decision according to the circumstances of each individual case.<sup>33</sup>

Thus, a new concept was introduced in the Church, retirement for priests, a concept quite foreign to bishops and priests alike.

## 2. The Priest's Adjustment to Retirement:

Bishop Gallagher commented at the Institute in 1969 that, "we are dealing with the retirement of individuals who never really conceived that it was going to be absolutely necessary for them to retire."<sup>34</sup> This observation was made in 1969 and yet, even today, many priests still believe that they should be allowed to "die with their boots on." Msgr. Ritty, in our conversation, mentioned that many of the men he has talked to who are approaching retirement age, refuse to face the fact and to begin to prepare for it.

It is important to remember that from the earliest days of a man's entering the seminary, the words "You are a priest forever" are presented to make him totally emersed in being a priest as well as functioning as one. . . . His work is his life.<sup>35</sup> The priesthood is a lifetime commitment. He is to be a priest at all times for all people. "It is the identification of work and being which makes it almost a contradiction in terms to speak of the retirement of a priest."<sup>36</sup> Bishop Gallagher comments that retirement for the priest "may seem to be premature death to those who are now being asked to consider it as a step in the total pattern of their life."<sup>37</sup>

Many of the adjustments to retirement the priest shares with other persons who are retiring. The more unique adjustments of the priest include the "possibility of moving his residence, separating himself from many of his most recent and long-time friends."<sup>38</sup> The priest does not have an immediate family (wife and children) to help him in this difficult adjustment. He must rely on friends and brothers and sisters who themselves may be incapacitated. Finally, the pastor who is about to retire is leaving a society, the parish, where he has been "King." "With all the other aspects of retirement facing him, he suddenly realizes that he is suddenly no longer in control either of his life, his household, or the parish community that he has served for so long."<sup>39</sup>

On the other hand, the priest does have some advantages which should ease his adjustment to retirement. He does not have the financial worry of supporting a spouse. His spiritual out-



look on life and belief in the Resurrection should carry over to a more positive attitude toward death.

### 3. Research on Retirement of Priests.

In reviewing the literature only one study was found that focused on the retirement of priests. No doubt, other research studies have been conducted in the dioceses, and one of our objectives is to discover what research has been done and to summarize the findings.

Nugent (1975) studied the disengagement theory of aging and retirement as applied to clergyman (ministers, diocesan priests and priests belonging to religious communities).<sup>40</sup> He found that:

1. Clergymen did remain engaged in their work beyond retirement to a significantly higher degree than men of other callings.

2. Married clergymen generally were found to enjoy greater life satisfaction after retirement than unmarried clergy.

3. Personality type influenced the degree of disengagement after retirement.

4. Those clergymen who had a higher engagement index showed a higher degree of life satisfaction in retirement.

Hopefully in the years ahead with the continued development of pre-retirement and retirement programs for priests, we will witness an increase in research studies considering the effectiveness of these programs. This will be of tremendous assistance to all concerned.

### D. Definitions.

Several variables used in this study still require definition:

1. Diocese: a diocese is defined as "that portion of God's people which is entrusted to a bishop to be shepherded by him with the cooperation of the presbytery."<sup>41</sup> In general, the term "diocese" refers to the territorial jurisdiction of a bishop.

There are 169 dioceses included in this study. This number encompasses:

- a. 159 Latin Rite Dioceses.<sup>42</sup>

b. 8 Eastern Rite Dioceses.

c. 2 United States Territories of Guam and the Virgin Islands.

However, at the time of the Institute (1969) there were only 149 Latin Rite Dioceses. Ten new dioceses have been established since 1969.

Dioceses are grouped into provinces centered around an archdiocese (usually the largest diocese of the area) presided over by an archbishop.

2. Extent of implementation: refers to the extent to which the recommendations of the Institute have been put into practical operation in terms of diocesan policy and programming.

3. Knowledge of recommendations: (refers to the person(s) responsible for pre-retirement and retirement of priests in each diocese): the awareness of and scope of information about the recommendations of the Institute.

4. Implementation plan(s): refers to an action, plan, or schedule in each diocese regarding future implementation of the recommendations of the Institute.

5. Other (additional) plans: refers to various pre-retirement and retirement guidelines and policies that have been implemented but were not specifically recommended at the Institute.

# Chapter III

## RESEARCH METHODOLOGY

### **A. Study Type.**

This is a descriptive study; the sub-type is that of population description. Therefore, this study does not involve the testing of a hypothesis. However, it is quite possible that, as a result of this study, further research projects testing causal hypothesis could be generated.

The purpose of this study is to obtain clear and accurate information regarding the subject matter in question: the pre-retirement and retirement programs for diocesan priests.

### **B. Research Design.**

This is a non-experimental, descriptive study design. The recommendations presented at the Institute have been incorporated into a questionnaire. This instrument has been constructed so as to enable the writer to determine the extent of implementation. Also, all of the additional objectives, identified previously, have been introduced by means of the questionnaire.

### **C. Selection of Subjects.**

The universe under study encompasses all of the Roman Catholic Dioceses in the United States, 169 in all. This includes all Latin Rite (159) and Eastern Rite Dioceses, as well as the United States Territories of Guam and the Virgin Islands (2).

Due to the nature of this study and the information desired, it was decided not to use a sample but to contact every diocese.

Currently there is no available comprehensive listing of persons in the dioceses involved with pre-retirement and retirement planning and programming for priests. Thus, the only feasible approach was to mail the questionnaire to all the Ordinaries with

the request that it be forwarded to the appropriate person(s). Bishop Gallagher wrote the cover letter stating the purpose, nature, and potential value of the study. He encouraged a prompt response. (See Appendix I.) Msgr. MacDonald facilitated the mailing. There was a one-month deadline set for the return of the completed questionnaire. At the end of the month, a follow-up letter was sent to those who had not yet responded. (See Appendix II.) There was a two-week deadline set for return. There were no further attempts, however, to elicit a return.

#### **D. Data Collection.**

As was mentioned previously, the data collection was carried out by means of a questionnaire. (See Appendix III.) The recommendations were extracted from the proceedings of the Institute and restated in fixed alternative or closed question type. It was also necessary to use open-ended questions. This was especially true for introducing the variables stated in the additional objectives of this study, as well as to obtain further information regarding retirement policies and programs.

There were three major sections to the questionnaire: 1) Identifying information; 2) Pre-retirement Program; 3) Retirement Program. All of the recommendations were grouped together under substantive headings as they related to the major sections.

The questionnaire was pretested by eight diocesan priests in Washington, D.C. and Baltimore, Maryland. The questionnaire was then revised and pretested once again using two diocesan priests as subjects. Unfortunately, time limitations did not permit pretesting of the questionnaire in a sample of the dioceses.

#### **E. Data Processing and Analysis.**

Initially, each diocese was assigned a code number, beginning with 001 and ending with 169. Each item of information was assigned a column number for computer card/coding. As a questionnaire was received, the information it contained was coded. The information was then transferred onto computer cards with the use of a keypunch machine. Punched cards were then checked against the questionnaires to ensure that the information had been accurately transcribed and punched.

Using the SPSS program frequencies were tabulated and appropriate statistical tests were applied to the data.

# Chapter IV

## RESEARCH FINDINGS

The following descriptive data analysis corresponds to the three major sections of the questionnaire. (See Appendix III.)

### A. Identifying Information.

Of the 169 questionnaires mailed to the dioceses, 139 or 82.2% were completed and returned. The respondents were all bishops or priests holding various positions in the dioceses. Chancellors accounted for 31.1% of the respondents; bishops accounted for 25.2%; members of Priests' Retirement or Pension Boards accounted for 15.8%; members of Priests' Personnel Boards accounted for 7.9%. Some of the other respondents included: Pastors (2.2%), Vicars for retired priests (1.4%), and Bishops' Secretaries (1.4%).

Table 1 describes the number of dioceses responding to the study according to their respective regions of the country.<sup>43</sup> The two highest percentage responses were from the U.S. Territories (of which there were only two) 100%, and the West South Central Region, 94.4%. The two lowest percentage responses were from the Eastern Rite Dioceses, 25%, and the South Atlantic Region, 76.4%. The overall high rate of response is largely attributable to the cooperation of the Bishops' Committee on Priestly Life and Ministry.

Table 2 describes the total number of priests in the dioceses responding. The great majority of dioceses, 111 or 79.8%, have less than 300 priests. Only two dioceses reported 1200+ priests.

Table 3 describes the total number of retired priests in the dioceses responding.<sup>44</sup> The great majority of dioceses, 106 or 77.4%, have less than 30 retired priests. Only two dioceses reported 110+ retired priests.

TABLE 1

FREQUENCY TABLE DESCRIBING TOTAL NUMBER OF DIOCESES RESPONDING TO SURVEY ACCORDING TO REGION

REGION AND STATES IN REGION	TOTAL NUMBER OF DIOCESES IN REGION	TOTAL NUMBER OF DIOCESES RESPONDING	PCT. OF TOTAL FROM WITHIN EACH REGION	PCT. OF TOTAL POSSIBLE RESPONDENTS
NEW ENGLAND (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut)	11	10	90.9	7.2
MIDDLE ATLANTIC (New York, New Jersey, Pennsylvania)	20	17	85.0	12.2
SOUTH ATLANTIC (Delaware, Maryland, District of Columbia, North Carolina, South Carolina, Georgia, Florida)	17	13	76.4	9.4
EAST NORTH CENTRAL (Ohio, Indiana, Illinois, Michigan, Wisconsin)	29	24	82.8	17.3
EAST SOUTH CENTRAL (Kentucky, Tennessee, Alabama, Mississippi)	8	7	87.5	5.0



WEST NORTH CENTRAL (Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas)	25	20	80.0	14.4
WEST SOUTH CENTRAL (Arkansas, Louisiana, Oklahoma, Texas)	18	17	94.4	12.2
MOUNTAIN (Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada)	12	11	91.7	7.9
PACIFIC (Washington, Oregon, California, Alaska, Hawaii)	19	16	84.2	11.5
EASTERN RITE	8	2	25.0	1.4
U.S. TERRITORIES	2	2	100.0	1.4
TOTAL	169	139		100.0

**TABLE 2****FREQUENCY TABLE DESCRIBING TOTAL NUMBER OF PRIESTS IN DIOCESE RESPONDING TO QUESTIONNAIRE**

TOTAL NUMBER OF PRIESTS	NUMBER OF DIOCESES	PERCENTAGE
000 - 299	111	79.8
300 - 599	18	13.0
600 - 899	5	3.6
900+	5	3.6
<b>TOTAL</b>	<b>139</b>	<b>100.0</b>

**TABLE 3****FREQUENCY TABLE DESCRIBING TOTAL NUMBER OF RETIRED PRIESTS IN THE DIOCESES RESPONDING TO QUESTIONNAIRE**

TOTAL NUMBER OF RETIRED PRIESTS	NUMBER OF DIOCESES	PERCENTAGE
0 - 29	106	77.4
30 - 59	24	17.5
60 - 89	2	1.5
90+	5	3.6
<b>TOTAL</b>	<b>137 *</b>	<b>100.0</b>

\* Two dioceses did not respond to this question.

The 139 dioceses report 2988 retired priests, of these 708 or 23.7% reside in retirement outside of their home dioceses and 2280 or 76.3% reside in retirement in their home dioceses.

## 2. Knowledge of the Institute.

Of those who responded, 48.1% indicated that they were aware of the Institute on Planning for Pre-Retirement and Retirement of Priests. Only 5.1% reported attending the Institute and 5.8% reported that although they did not personally attend the Institute, another representative of their diocese was in attendance. Therefore, 11% of the dioceses responding had a representative at the Institute. However, it must be pointed out that the Institute took place nine years ago and the respondents might very well not be aware of the fact that the diocese was represented at the Institute.

In response to the question of whether they had a copy of the proceedings of the Institute, 16.2% reported affirmatively. Several also commented that they did not know and that "it could be buried somewhere in the files."

A percentage of 49.6 responded that they "do not" know if the recommendations presented at the Institute had been incorporated into their present diocesan policy; 14.7% responded that the recommendations had been "somewhat" incorporated, and 5.2% said that they had been incorporated in "large part." A percentage of 30.5 did not respond to the question.

In response to our first additional objective, "to determine to what extent the recommendations are known," it would appear from the data that the recommendations are not very well known. However, almost 50% express awareness of the Institute and, at the same time, almost 50% state that they do not really know if the recommendations were incorporated. One of the key factors here is the time element as well as the possible turnover in administrative personnel during the nine years. It is also quite possible that the recommendations were passed along by word of mouth from diocese to diocese without ever being associated with the Institute.

## **B. Pre-Retirement Program for Diocesan Priests.**

Regarding pre-retirement programs, 21.9% (30) of the dioceses report such a program. Of these, 10.2% conduct the program on an individual basis; 2.2% conduct the program on a group basis, and 9.5% conduct the program on both an individual and a group basis. 5.8% of the dioceses report that their pre-retirement program is comprehensive in nature, i.e., covering all aspects of aging, and 16.1% say that their program is limited in scope, i.e., just explaining the pension program, benefits, timing, and living arrangements, etc. One hundred seven or 78.1% of the dioceses do not have a pre-retirement program.

Twenty-eight of the dioceses gave a brief description of their pre-retirement programs. Several of the more "comprehensive" programs involved contacting the priests one-to-ten years before retirement and giving an explanation of the diocesan pension plan, living arrangements, opportunities for continued ministry, etc. At a time closer to retirement, there are group sessions (optional) explaining the psychological, physiological, and spirit-

ual dimensions of pre-retirement and retirement. The majority of the programs described were individual and limited in nature.

In response to questioning (of those 30 who do have a pre-retirement program) as to whether there is any coordination of efforts between diocesan departments or offices in regard to pre-retirement planning and programming, 76.7% (23) report that such coordination exists, and 23.3% (7) indicate that it does not exist.

There were several recommendations made at the Institute concerning possible components and/or methods of conducting a pre-retirement program. Table 4 describes these recommendations and percentages of the dioceses that do include some in their program. Each was presented in a separate question and therefore, each percentage in the table is based on 100%.

**TABLE 4**  
**FREQUENCY TABLE DESCRIBING PRE-RETIREMENT PROGRAM COMPONENTS/METHODS AND PERCENTAGES OF DIOCESES RESPONDING AFFIRMATIVELY**

COMPONENT/METHOD	PERCENTAGE OF AFFIRMATIVE REPLY
1. Our program includes a gradual shifting of roles in the parish ministry as a man approaches retirement.	10.2%
2. We make use of retreats and workshops as part of our program.	8.0%
3. Our program allows for a sabbatical leave to give the priest an opportunity for developing new interests . . .	3.6%
4. As part of our program, we make use of consultation or guidance services to help the priest assess his assets and explore other priestly roles.	4.4%
5. Our program includes seminars for priests periodically throughout the years of priestly service on the aging process.	5.1%
6. Other . . .	5.8%

Among the "other" components (#6 above) were included comments regarding a combination of individual consultation and a later workshop and clergy conferences concerning the aging process, to which all the priests were invited.

Of those 109 dioceses that do not presently have a pre-retirement program for priests, 18.3% (20) indicated that they have a plan for initiating such a program and 39.4 (43) indicated no such plan. Fifty-one or 46.8% did not respond to the question.

Those dioceses which are planning to initiate a pre-retirement program were asked to give a brief description. Comments included: "We now offer the option for a priest to retire from the role of pastor at age 65, but still remain active as a priest. There is a financial incentive to do this. . . . Also working on a comprehensive pre-retirement program in conjunction with Consultation Services Center and Priests' Senate."

"The Diocese of \_\_\_\_\_ and Priests' Retirement Board are actively discussing a pre-retirement program."

Another respondent commented, ". . . retirement affects a very small number of our clergy. In the years ahead as the numbers increase, a more formal program will be implemented. At the present time each case is being handled individually."

Still another said, ". . . looking for information on such a pre-retirement program."

Finally, one respondent mentioned, "We have recently formed a small committee, chaired by the Vice-Chancellor with two religious superiors who operate institutional facilities caring for retired priests, to advise the Archdiocese on not only pre-retirement but also on long-range programs and facilities."

These comments and others like them are related to our second objective, "To determine if there is any plan and projection for the implementation of the recommendations." It seems that there is considerable interest and activity in the dioceses regarding pre-retirement programming and many of the dioceses seem to be quite conscious of the importance of planning for future needs. All of this certainly falls within the recommendations presented at the Institute.

It was also recommended at the Institute that the seminary education should include concepts concerning the aging process and retirement and also present the diocesan retirement policy



for the priests. Only 29 dioceses responded to this question and of those 24.1% were in the affirmative. Here it must be borne in mind that many of the smaller dioceses do not have their own seminaries and thus, the respondents would not be aware of whether or not such concepts were discussed as part of the seminary education program.

### C. Retirement Program for Diocesan Priests.

#### 1. Vicar or Delegate for Retired Priests.

One of the recommendations made at the Institute was that every large diocese should designate someone (full-time if possible) as coordinator for retired priests. Thus, we asked the respondents:

“Does your diocese have a priest serving as delegate or vicar for retired priests?” Yes \_\_\_\_\_ No \_\_\_\_\_.

“If yes: Are you that person?”

“Is this appointment full-time \_\_\_\_\_ or part-time? \_\_\_\_\_.”

Table 5 describes the number of dioceses and their responses regarding a delegate for retired priests. 17.2% (24) dioceses report that they do have a delegate or vicar for retired priests.

**TABLE 5**

#### **FREQUENCY TABLE DESCRIBING TOTAL NUMBER OF DIOCESES AND RESPONSES REGARDING DELEGATE FOR RETIRED PRIESTS**

RESPONSE FROM DIOCESES	NUMBER OF DIOCESES	PERCENTAGE
No (we do not have a delegate)	114	82.0
Yes-Yes (Yes we do have a delegate and I am that person)	12	8.6
Yes-No (Yes, we do have a delegate. No, I am not that person)	12	8.6
<b>TOTAL *</b>	<b>138</b>	<b>99.2</b>

\* One diocese did not report.

Although 24 dioceses reported having a vicar, only 23 responded to the question regarding the nature of the appointment. Of those 23 dioceses reporting a vicar, 13% (3) stated that the appointment is full-time and 87% (20) part-time.



Many other dioceses stated that while they do not have a vicar or delegate for retired priests, there is a priest assigned to maintain contact and to be of assistance to the retired priests. This may be a representative of the personnel board or pension board or some other diocesan department.

One hundred twenty-three or 90.4% of the dioceses responding report that they do have a definite retirement policy that is clearly stated and followed. One hundred twenty or 97.6% of those dioceses who do have a policy report that the priests of the diocese or their representatives participated in the formulation of that policy. This is very much in accord with one of the recommendations of the Institute.

### 3. Financial.

One hundred thirty-seven of the 139 dioceses responded to the question regarding whether or not they had a pension plan. One hundred thirty-three or 97% of the dioceses responding have a pension plan for retired priests.

Table 6 describes the current amount of the pension in the dioceses responding. The mean or average pension is \$402, the modal pension is \$400. Two dioceses report a \$200 monthly pension and one diocese reports a \$700 monthly pension. Therefore, the range of pension incomes is from \$200 to \$700. (One diocese reports a \$800 maximum pension allowance that would apply only in exceptional circumstances, e.g., a retired priest living in a public institution. Thus it was not included in the computations.)

**TABLE 6**  
**FREQUENCY TABLE DESCRIBING MONTHLY AMOUNT OF PENSION IN THE DIOCESES RESPONDING.**

Dollar Amount of Monthly Pension	Number of Dioceses Responding	Percentage
\$200 - 299	7	5.2%
\$300 - 399	47	35.0%
\$400 - 499	44	32.8%
\$500 - 599	31	23.1%
\$600 +	5	3.7%
<b>Total</b>	<b>134*</b>	<b>99.8% **</b>

\* While 137 dioceses stated that they do have a pension plan, only 134 stated the monthly pension amount.

\*\* Error due to rounding of numbers.

The respondents were then asked, "If the monthly pension allowance varies according to living arrangements or for other reasons and circumstances, please explain." The greatest number of written responses came in reply to this request. The writer can only hope to summarize what appear to be the general trends:

A. In most dioceses, if a priest resides in a rectory or diocesan institution (clergy retirement home or other diocesan home), a percentage of the pension goes to place of residence. If a priest is living in his own home or apartment, he receives the maximum pension.

B. In some dioceses, the monthly pension is determined according to years of service, e.g., 40 years service  $\times$  \$6.75 per month. There is usually a stated maximum amount.

C. In some dioceses, the monthly pension is dependent upon the age of retirement, e.g., at age 70 maximum amount and declining scale at an earlier age.

D. In some dioceses there is no variation in the monthly pension.

It is important to remember that many of the retired priests are also receiving Social Security income. Also, additional income may be derived from part-time parish work, etc.

The respondents were also asked, "What other benefits are provided for retired priests?" Here again, the responses can only be summarized:

A. Most of the dioceses provide some type of medical insurance, i.e., Blue Cross, Blue Shield, Major Medical, reimbursements for Medicare.

B. A few dioceses, in addition to the above, provide one or more of the following: car insurance, life insurance, oral surgery, retreat and workshop costs, nursing home care, all doctor bills, therapy.

C. In a few dioceses the priest is responsible for his own medical coverage.

The dioceses were also questioned regarding the sources of revenue for the pension fund. Table 7 describes the sources of revenue for the pension fund. One of the recommendations of the Institute was that the priest should contribute annually to the pension fund as a "personal investment."

**TABLE 7**

**FREQUENCY TABLE DESCRIBING SOURCES OF REVENUE FOR PENSION FUND IN THE DIOCESES RESPONDING. (EACH NUMBER AND PERCENTAGE IS BASED ON N OF 139 OR 100%.)**

SOURCE OF REVENUE	NO. OF DIOCESES RESPONDING AFFIRMATIVELY	% OF DIOCESES RESPONDING AFFIRMATIVELY
Each priest contributes . . .	37	26.6%
Parish or institution to which priest is assigned contributes . . .	107	77.0%
Annual diocesan collection . . .	32	23.0%
Non-contributory, funded by diocese . . .	23	16.5%
Other *	36	25.9%

\* Under the category "other," the respondents mentioned the following: endowments, bequests, assessment of parishes, trust funds, and special gifts.

#### 4. Retirement Age.

Ninety-one dioceses (65.5%) report having a mandatory retirement age for priests. Table 8 describes the mandatory age and number of dioceses responding. The modal age is 75. The age of mandatory retirement ranges from 70 to 80.

**TABLE 8**

**FREQUENCY TABLE DESCRIBING MANDATORY RETIREMENT AGE AND DIOCESES RESPONDING**

AGE	NUMBER OF DIOCESES	PERCENTAGE
70	38	27.3
71	1	0.7
75	51	36.7
80	1	0.7
No mandatory age	48	34.5
<b>TOTAL</b>	<b>139</b>	<b>99.9*</b>

\* Error due to rounding of numbers.

The recommendations at the Institute appear to conflict as to whether or not there should be a mandatory retirement age. One recommendation was that there should be . . . "retirement from

positions of authority demanded and accepted with rare exceptions." Another recommendation stated, "There should be flexibility in retirement planning . . . no absolutely mandatory retirement age."

Several of the respondents stated that while there was a diocesan policy of mandatory retirement at a given age, some exceptions were allowed. One priest commented that while there was a mandatory retirement age, it was not followed due to a "shortage" of priests.

Still another respondent stated:

There seems to be a very definite fear among the majority of our older priests (60+) concerning their retirement. There is the attitude that "when we were ordained, we expected to die with our boots on." This and lack of real mental preparation has forced us as the Senate of Priests to *re-evaluate our mandatory retirement at 75*. Our new regulation is that a priest might resign at 75 and could either retire or ask the personnel board to reassess his abilities and reassign him accordingly. This seems to have taken a lot of the grief away from the older priest. . . .

In response to another question as to whether there is a policy regarding optional retirement from full-time work, 109 dioceses (78.4%) responded affirmatively. Table 9 describes the possible retirement age in the dioceses responding. The range is from age 60 to 75. The modal possible retirement age is 65.

**TABLE 9**  
**FREQUENCY TABLE DESCRIBING OPTIONAL AGE OF**  
**RETIREMENT IN THE DIOCESES RESPONDING**

Optional Age of Retirement	Number of Dioceses	Percentage
60	1	0.7%
65	68	48.9%
68	2	1.4%
70	36	25.9%
72	1	0.7%
75	1	0.7%
No response	30	21.6%
<b>TOTAL</b>	<b>139</b>	<b>99.9%*</b>

\* Error is due to rounding of numbers.

In 35 dioceses (25.2%) retirement from full-time work is determined individually (subject to the Bishop's approval) for each priest.

Many of the respondents stated that the word retirement as applicable to priests, whether mandatory or otherwise, refers only to the turning over or giving up administrative responsibilities and not retirement from the priesthood or from priestly work. One respondent commented that it would perhaps be better to use some word other than retirement.

### 5. Living Arrangements.

It was recommended at the Institute that there be flexibility in regard to living arrangements available to retired priests. Table 10 describes the various types of living arrangements for priests available in the dioceses responding. *It is interesting to note that 34 dioceses (24.5%) report that they have a diocesan residence available for retired priests if they desire to reside there.* Some of the comments under the category "other" were: chaplain's residence of an institution, mobile homes, out of the country, and homes for the elderly operated by religious communities in the diocese. Several dioceses commented that the retired priest could reside in a "rectory of choice," but NOT in the parish of his last assignment.

**TABLE 10**

**FREQUENCY TABLE DESCRIBING VARIOUS OPTIONAL TYPES OF LIVING ARRANGEMENTS AVAILABLE FOR RETIRED PRIESTS IN THE DIOCESES RESPONDING. (EACH NUMBER AND PERCENTAGE IS BASED ON N OF 139 OR 100%).**

LIVING ARRANGEMENTS	NO. OF DIOCESES	PERCENTAGE
Diocesan residence for retired priests	34	24.5
Diocesan homes for the elderly	62	44.6
Residing in last parish assigned	74	53.2
Residing in rectory of choice	97	69.8
Residing with family or friends	102	73.4
Residing in another state	108	77.7
Residing in own home or apartment	129	92.8
Other	24	17.3



Table 11 describes the most common preference by retired priests regarding living arrangements. The great favorite, as indicated by 60 dioceses (43.2%), is residing in one's own home or apartment.

**TABLE 11**  
**MOST COMMON (PREFERRED) TYPES OF LIVING**  
**ARRANGEMENTS SELECTED BY RETIRED PRIESTS**  
**IN THE DIOCESES.**

LIVING ARRANGMENTS	NO. OF DIOCESES	PERCENTAGE OF DIOCESES
Diocesan residence for retired priests	13	9.4
Diocesan homes for the elderly	5	3.6
Residing in last parish assigned	16	11.5
Residing in rectory of choice	13	9.4
Residing with family or friends	8	5.8
Residing in another state	8	5.8
Residing in own home or apartment	60	43.2
Other	4	2.9
Missing	12	8.6
TOTAL	139	100

## 6. Ministerial Roles in Retirement.

It was recommended at the Institute that retired priests be offered a variety of options as to new roles they might assume in the ministry. Table 12 describes various options for continued involvement in the ministry after retirement and the number of dioceses stating that these options are available. The two greatest responses were "part-time parish work," (118 dioceses) and "offering Mass and hearing confessions." (116 dioceses).

Some of the comments under the category "other" were: "a priest may do any of the above if he wishes and if he is qualified"; part-time assignments, vacation replacement, tribunal work, full-time associate, emergency replacement (sudden illness or death of pastor), serving as co-pastor, diocesan archivist, supply help on weekends, anything non-administrative, diocesan consultant, and assist in administration of parish.

It was also recommended at the Institute that each diocese maintain a current list of available opportunities for continued

but reduced involvement in the ministry. This would enable retired priests to know what is available and make their selections accordingly.

**TABLE 12**

**FREQUENCY TABLE DESCRIBING OPTIONS FOR CONTINUED INVOLVEMENT IN THE MINISTRY AFTER RETIREMENT AND NUMBER OF DIOCESES RESPONDING AFFIRMATIVELY. (EACH NUMBER AND PERCENTAGE IS BASED ON N OF 139 OR 100%).**

MINISTERIAL ROLES	NO. OF DIOCESES	PERCENTAGE
Pastor emeritus	71	51.1
Part-time parish work	118	84.9
Chaplaincy positions	77	55.4
Retreat work	21	15.1
Counseling	39	28.1
Giving conferences	23	16.5
Offering Mass and hearing confessions	116	83.5
CCD work	21	15.1
Visiting hospitals and the elderly	83	59.7
Writing and reviewing	30	21.6
Consultant to other priests	46	33.1
Spiritual direction	57	41.0
Convert instructions	18	12.9

### 7. Miscellaneous.

It was further recommended at the Institute that the dioceses develop means of maintaining regular contact with retired priests. In addition to those "means" suggested at the Institute, other possible vehicles for "keeping in touch" have been included by the writer. Table 13 describes vehicles for maintaining continued contact with the retired priests and the number of dioceses using the same. Those recommended at the Institute are so designated within an asterisk. The highest number of responses are under the categories of "official chancery communications," (124 or 89.2%) and invitations to special diocesan and parish functions (124 or 89.2%).

Even though there was no category listed as "other," quite a few of the smaller dioceses wrote in that they did not have an elaborate plan for maintaining contact with retired priests because it was not necessary. All the priests are in regular contact with each other and with the bishop.

TABLE 13

FREQUENCY TABLE DESCRIBING OPTIONS FOR MAINTAINING CONTINUED CONTACT WITH RETIRED PRIESTS AND THE NUMBER OF DIOCESES USING SAME. (Each number and percentage is based on N of 139 or 100%).

OPTIONS FOR MAINTAINING CONTACT WITH RETIRED PRIESTS	NO. OF DIOCESES	PERCENTAGE
* Vicar or Delegate for retired priests	19	13.7
Official diocesan chancery communications	124	89.2
Special newsletter for retired priests	4	2.9
* Invitations to special diocesan and parish functions	124	89.2
* Invitations to clergy conferences and continuing education workshops	121	87.1
* Periodic individual conferences with Bishop or his delegate	54	38.8
* Special periodic workshops or seminars for retired priests	5	3.6
Representation of retired priests on Senate	40	28.8

\* Asterisk indicates a recommendation of the Institute.

It was also recommended at the Institute that each diocese have an official, annually undated register or listing of names and addresses of retired priests that is mailed to all the priests of the dioceses. One hundred thirty-four dioceses responded to this question and 105 (78.4%) reported having such a register. Some mentioned here that the annual diocesan directory lists all the priests and their location.

Along these same lines it was recommended that there be established a "National Clearing House" where a priest could leave his name and indicate the type of pastoral activity in which he would be interested. This recommendation has not been followed up, but it is worthy, in this writer's opinion, of further thought.

Another of the recommendations was that research be conducted in the dioceses on what older priests themselves would like to do and what kinds of activities they have engaged in after retirement and found satisfying and rewarding. One hundred

thirty-four dioceses responded to this question and 37 (27.6%) responded that they have conducted research of some type (mostly survey) related to retired priests. They were asked to briefly describe the nature of the studies and findings. To summarize:

1. Some dioceses (6) reported research regarding attitudes of retired priests towards a diocesan retirement home for priests. One diocese stated that the majority opinion supported the residence. Three stated that the majority of priests in their dioceses rejected the idea. Two dioceses stated that the reaction was "mixed."

2. Eleven dioceses report that they annually or periodically survey the retired priests concerning their opinions and feelings on the retirement policy, needs, life style, financial concerns, and ministerial possibilities. One diocese stated that the "findings" were very positive. Another diocese reported that the retired priests were lonely, finding it difficult to live outside the rectory, and finding the retirement adjustment difficult.

3. One diocese reports that the research work is just beginning through lay resources director for retired priests. This is the only diocese reporting a lay person employed to work with the retirement program.

4. Two dioceses report having conducted major research projects and both included a copy of their study.

A. One project<sup>45</sup> dealt with a survey of all priests in the diocese regarding a group retirement home. Some of the conclusions were:

1. There is no clear-cut attitude towards retirement.

2. Many priests who see inadequacies in present retirement arrangements favor the proposal.

3. There is a need for more physical options for retired priests.

4. Today's active priests expect to retire at an earlier age than that at which priests have actually retired in the past.

5. Most active priests in the diocese have not made definite retirement arrangements.

6. No consensus regarding proposed home.

B. The second major research project<sup>46</sup> was a study of the life of priests in retirement in that diocese. Some of the conclusions were:

1. For the most part, diocesan priest retirees are still interested in some form of priestly service.

2. Some are happy living alone; but a good number would like companionship of fellow priests.

3. Many would prefer to live in residences with fellow priests.

The two recommendations of this project were:

1. That a priest be appointed as director for retired priests.

2. That a residence for retired priests be established outside of the city.

All of the above-mentioned research studies indicate a great deal of concern on the part of bishops and priests regarding the well-being of retired priests. Overall there seems to be regular contact between diocesan departments and the retired priests. The retired priests have been consulted and their suggestions have been, or are being, acted upon.

One of our additional objectives was to find out what research has been conducted on the diocesan level regarding the needs and attitudes of retired priests. While there still remains a lot of work to be done in this regard, it is the opinion of the writer that there have already been some very good "beginnings."

The final question on the questionnaire did not directly relate to the recommendations. It was an attempt to look at the response of the priests in the dioceses to the concept of retirement. One hundred thirty-three dioceses responded to this question. Table 14 describes the priests' response to retirement (as viewed by the respondents) in the dioceses' reporting.



**TABLE 14**  
**FREQUENCY TABLE DESCRIBING PRIESTS' RESPONSE**  
**TO RETIREMENT IN THE DIOCESES REPORTING.**

PRIESTS' RESPONSE TO CONCEPT OF RETIREMENT	NO. OF DIOCESES RESPONDING	PERCENTAGE
Positive	65	48.9
Mixed	66	49.6
Negative	2	1.5
TOTAL	133	100.

At the end of the questionnaire, the respondents were given the opportunity to present any additional comments or suggestions they might have. Some of the comments were as follows:

A. In general:

1. Several respondents requested a copy of the research study as well as resumés of programs in other dioceses.

2. Smaller dioceses almost universally agreed that retirement was not a great problem. There seems to be a closeness and support between priests, and bishop and priests, that obviously is much more difficult to attain in a large diocese.

3. Several expressed a desire for assistance, especially in regard to pre-retirement programming.

B. In particular:

1. ". . . options for priests in retirement are necessary. A retired priest must feel needed. He has much to give . . . priests must be encouraged to continue in priestly ministry, even on a limited basis, after retirement."

2. ". . . complete retirement at age 70 leaves much to be desired for most priests. The ideal position for most elderly priests seems to be an active position in spiritual priestly ministry without administrative responsibility."

3. "I would be interested in knowing if a National Retirement Plan for Priests is being thought of."

4. "I would be remiss if I did not mention that the extraor-

dinary fraternal concern of our Bishop and retirees has been the strongest factor in the success of our retirement plan as well as the positive attitude of our priests."

5. "The idea of retirement is gaining in acceptance now but in the beginning was shock to most priests."

One of our additional objectives was to consider any additional suggestions from the dioceses in regard to pre-retirement policies and programs. The above comments indicate a need for sharing information between dioceses regarding pre-retirement policies and programs. It is very difficult to devise such programming in isolation. Interestingly, none of the respondents suggested the possibility of dioceses coming together on a national or regional basis for discussion of sharing information. However, the comments would appear to indicate the need for such a gathering.

Another of our objectives was to determine what plans and programs have been implemented in addition to those suggested at the Institute. Overall there were very few and they could be best classified as program components. One concerns the hiring of a Lay Resources Advisor for Retired Clergy. This diocese<sup>47</sup> has also developed a job description for this position. Another would be the concept of "senior associate."<sup>48</sup> Here a retired priest serves in a parish as an associate pastor and his responsibilities are adapted to his abilities and wishes.

#### **D. Statistical Analysis.**

Another one of the additional objectives was to determine some of the independent variables that have impacted the extent of implementation of the recommendations in the dioceses.

Several independent variables were selected for correlation with dependent variables. The independent variables that were selected are stated below:

A. Awareness of Institute. An awareness scale was developed based upon the response to items 9-11 on the questionnaire. (See Appendix III).

Then Chi square cross tabulations were used to determine the degree of correlation between the respondents' awareness and the other variables on the questionnaire. The data revealed the following significant correlations:

**TABLE 15**

**$\chi^2$  SIGNIFICANCE LEVELS FOR RESPONDENTS' DEGREE OF AWARENESS CORRELATED WITH SELECTED VARIABLES.**

VARIABLE	SIGNIFICANCE LEVEL
Our program includes seminars for priests (Item 29)	.000
Other, please specify (Item 52)	.02
Periodic individual conferences (Item 75)	.0007

No other dependent variable was found to be significantly related to awareness. There does not appear to be very much correlation between awareness of the Institute and the implementation of the recommendations. The only correlation that was found involved three isolated variables (Table 15). Additionally, in looking at the outcome of this  $\chi^2$  cross tabulation, for most of the dependent variables, there were not enough cases per category to make a conclusive correlation.

B. Next, the total number of priests in the dioceses (Item 13) and then total number of retired priests in the dioceses (Item 14) were categorized. Chi square cross tabulations were used to see if there was a correlation between the total number of priests/total number of retired priests and the other dependent variables. The data revealed the following significant correlations:

TABLE 16

$\chi^2$  SIGNIFICANCE LEVELS FOR TOTAL NUMBER OF PRIESTS/TOTAL NUMBER OF RETIRED PRIESTS CORRELATED WITH SELECTED VARIABLES.

VARIABLE	SIGNIFICANCE LEVEL (TOTAL NO. OF PRIESTS)	SIGNIFICANCE LEVEL (TOTAL NO. OF RETIRED PRIESTS)
Does your diocese have pre-retirement program (Item 17)	.05 *	
We make use of retreats (Item 26)	.04	.03 **
Career consultation (Item 28)		.05 **
Program includes seminars (Item 29)	.0003*	.02 **
Retirement policy/priests participation (Item 33)		.05 **
Diocesan residence for retired priests (Item 45)	.0013	.01
Diocesan homes for elderly (Item 46)	.0000	.000
Residing in last parish assigned (Item 47)	.000	.02
Residing in rectory of choice (Item 48)	.000	.005
Residing with family or friends (Item 49)	.000	.001
Residing in another state (Item 50)	.001	.0001
Residing in one's own home or apartment (Item 51)	.000 *	.0006**
Vicar or delegate for retired priests (Item 70)	.001	.04
Invitations to clergy conferences (Item 74)		.06
Periodic individual conferences (Item 75)	.03	
Special periodic workshops (Item 76)	.003	.03 **
Representation on Priests' Senate (Item 77)	.0009	

\* There were not enough cases in each category to evaluate statistically.

\*\* There were not enough cases in each category to evaluate statistically.

The above were the only dependent variables found to be significantly related to the total number of priests/total number of retired priests. But it does indicate some relationship between the two independent variables and the implementation of the above recommendations.

C. Then the variable of vicar (delegate) for retired priests was categorized. Chi square cross tabulations were used to see if there was a correlation between vicar for retired priests and other selected dependent variables. The data revealed the following significant correlations:

**TABLE 17**

**$\chi^2$  SIGNIFICANCE LEVELS FOR VICAR FOR RETIRED PRIESTS CORRELATED WITH SELECTED VARIABLES.**

VARIABLE	SIGNIFICANCE LEVEL
Seminars for priests (Item 29)	.000
Diocesan residence for retired priests (Item 45)	.07
Residing with family or friends (Item 49)	.05
Vicar or delegate for retired priests (Item 70)	.00
Special Newsletter for retired priests (Item 72)	.00
Periodic individual conferences (Item 75)	.01
Representation on Senate of Priests (Item 77)	.002

No other dependent variable was found to be significantly related to vicar for retired priests. There does not appear to be very much correlation between having a vicar for retired priests and the implementation of the recommendations. The only correlation that was found involved the scattered variables above (Table 17). Once again, in looking at the outcome of this  $\chi^2$  cross tabulation, for most of the dependent variables, there were not enough cases per category to make a conclusive statistical correlation.

D. The variable region of the country (Item 5) was divided into four categories (North, East, South, West). Once again, Chi square cross tabulations were used to see if there was any correlation between the region of the country and other selected dependent variables. The following significant correlations were discovered:

**TABLE 18**

**$\chi^2$  SIGNIFICANCE LEVELS FOR REGION OF THE COUNTRY CORRELATED WITH SELECTED VARIABLES.**

VARIABLES	SIGNIFICANCE LEVEL
Diocesan homes for the elderly (Item 46)	.001
Residing in last parish assigned (Item 47)	.05



No other dependent variable was found to be significantly related to the region of the country. However, for most of the dependent variables there were again not enough cases per cell to make a conclusive statistical correlation.

E. Finally, the variable of priests' response to the concept of retirement was divided into two categories (positive or mixed). Chi square cross tabulations were used to check out any correlation with other selected dependent variables. Only one significant correlation was found and that was, "Does your diocese have an official register of retired priests . . ." (Item 78) which was significant at the .002 level. For most of the dependent variables there were enough cases per cell to make conclusive statistical correlations.

On one hand, there does not appear to be much correlation between the selected independent variables (A-E above) and the extent of implementation of the recommendations. However, on the other hand, there is no doubt but that all of the recommendations presented at the Institute have been implemented to a greater or lesser extent in the dioceses. Again, the writer can only refer to some comments made previously in this paper. The Institute took place nine years ago. This time lapse is, in my opinion, a crucial point. In 1969 pre-retirement and retirement were new concepts as related to priests. It may well have taken several years before many dioceses established policies and programs. Those who were developing the policies and programs in the dioceses may or may not have relied on the recommendations of the Institute, but our respondents today, only seven (5.1%) of whom attended the Institute, may not be aware of whether another representative from their diocese attended the Institute, and whether the recommendations were implemented. 49.6% said they do not know if the recommendations were incorporated in their present policies. The knowledge level leaves much to be desired in terms of a true assessment as to what extent the recommendations were implemented.

It is reasonable to assume that there has been a turnover in some of the diocesan personnel and this factor also impacts the knowledge of the recommendations as implemented or not implemented. Many of the recommendations may have been exchanged between dioceses by word of mouth with no association with the Institute.

Also, many of the recommendations, are, to an extent, general in nature and may have been implemented on the basis of what appeared most reasonable in a given situation allowing for all the variables that were present.

Finally there are, no doubt, many other factors not identified in this study which affected the extent to which the recommendations were implemented.



# Chapter V

## CONCLUSIONS AND RECOMMENDATIONS

### A. Comparative Analysis.

The writer recently discovered a summary of a survey research study conducted in 1968.<sup>49</sup> This was a survey of priests' retirement programs. It is valuable for comparative purposes to consider the findings of that study. It purports to be inclusive of all the dioceses in 1968 (153). Table 19 offers a comparison of the two studies.

**TABLE 19**  
**COMPARING 1968 SURVEY FINDINGS WITH 1977 FINDINGS.**

ITEMS	FINDINGS '68 153 Dioceses Reporting (100%)	FINDINGS '77 139 Dioceses Reporting (82.2%)
No. of retired priests	1,685	2,988
No. of dioceses with retirement plan	78	123
No. of dioceses with mandatory retirement age	41	92
Dioceses with optional retirement age at 65 or under	1	69
Maximum pension range for a priest living on his own	\$60.-\$600.	\$200.-\$700
Dioceses with retirement homes for priests	Two homes under consideration (No report on existing homes)	34+ several dioceses have homes under consideration
Three dioceses with highest number of retired priests	Chicago—110 Boston—77 Detroit—70	Chicago—no report Boston—118 Detroit—110

The figures speak for themselves. Important to note is that the present study and 1977 figures are based on 139 dioceses or 82.2% of the total number. There have been some tremendous developments since 1968.

## **B. Implications for further research.**

In the literature review the writer only found one research project (cited previously) that studied retirement theory as related to clergymen. In the present study many research studies were reported, but almost all were survey in nature.

The present study presents a fairly comprehensive picture of pre-retirement and retirement policies and programs that exist today in the dioceses.

However, as the literature reviewed revealed, we do not have much by way of hard empirical data regarding the effectiveness of these programs. We do not know to what extent the programs, as described above, are responding to the feelings and needs of retired priests. We do not know what programs are most effective and why. There is much room for development in the area of pre-retirement programming for priests and further research could be most helpful in this regard. It would be valuable to evaluate some of the existing programs regarding effectiveness.

The issue of mandatory retirement age as opposed to other possible alternative retirement guidelines or directives should be researched further as well.

## **C. Conclusions.**

In response to the original research question, "To what extent have the recommendations of the Institute on Planning for Pre-retirement and Retirement of Priests been implemented in the Catholic dioceses?", the data indicate that all of the recommendations applicable to the dioceses have been implemented in varying degrees. It can be said further that the process of implementation is still very much in progress.

Another conclusion is that the vast majority of the dioceses have revealed a very real concern about the welfare of their retired priests.

A final conclusion is that many dioceses could use some type



of assistance in developing and implementing their pre-retirement and retirement programs. There is no established vehicle for one diocese or many dioceses to know what the others are doing, what has proven effective or ineffective, etc. Some type of coordination of efforts would be most valuable in this regard.

#### **D. Recommendations.**

1. One recommendation is that further research studies be undertaken as indicated above. (Chapter V-B).

2. Another recommendation is that a survey type study, similar to this one, be conducted at regular intervals in order to keep abreast of developments.

3. A final recommendation is that it would be valuable to look into the possibility of developing a national office that could: initiate and execute research projects, serve as a consultant to dioceses, maintain continuous records on existing pre-retirement and retirement programs, plug into existing national organizations for the elderly (e.g., Administration on Aging (AOA), National Council on Aging (NCOA), and the American Association of Retired Persons (AARP), etc., keep track of Social Security and Medicare, etc. This could well be a joint undertaking of the Religious communities and the dioceses. There is always the possibility that certain Catholic Foundations might be willing to cooperate in such a venture.

## FOOTNOTES

<sup>1</sup> Interview with Fr. Vincent Mainelli, NCCC, Jan. 30, 1976.

<sup>2</sup> *Institute on Planning for Pre-Retirement and Retirement of Priests*. National Conference of Catholic Charities, Proceedings. (New Orleans, Louisiana, Jan. 19, 1969), p. i.

<sup>3</sup> *Ibid.*

<sup>4</sup> *Ibid.*

<sup>5</sup> Most Rev. Raymond Gallagher, D.D., "Concern and response to Priests' Retirement." *Proceedings of the Institute on Planning for Pre-retirement and Retirement of Priests*. (New Orleans, Louisiana, Jan., 1969), p. 5-7.

<sup>6</sup> Rev. Joseph Zuercher, S.J., "What 1600 Priests Think about Pre-retirement and Retirement." *Proceedings of the Institute*, p. 25.

<sup>7</sup> Brother John M. McDonough, "What the Social Scientist Thinks of Pre-retirement and Retirement." *Proceedings of the Institute*, p. 34.

<sup>8</sup> Dermott Smith, M.D., "Psychological Aspects of Pre-retirement and Retirement." *Proceedings of the Institute*, pp. 37-38.

<sup>9</sup> Rev. Robert Kearns, S.S.J., "Sociological Aspects of Pre-retirement of Clergy." *Proceedings of the Institute*, pp. 44-45.

<sup>10</sup> Rev. Paul F. D'Arcy, M.M., "Pre-retirement Planning for Priests." *Proceedings of the Institute*, p. 50.

<sup>11</sup> L. Ronald Homza, M.D., "The Relation of Health to Pre-retirement and Retirement Adjustment." *Proceedings of the Institute*, p. 54.

<sup>12</sup> Rev. Charles J. Fahey, "How to Make Retirement Purposeful Living." *Proceedings of the Institute*, p. 63.

<sup>13</sup> Rt. Rev. Msgr. Edward E. Michelin, "Types of Residence." *Proceedings of the Institute*, pp. 64-65.

<sup>14</sup> Rt. Rev. Msgr. Austin Healy, "Programming for Retirement." *Proceedings of the Institute*, pp. 66-68.

<sup>15</sup> Woodrow W. Hunter, "Pre-retirement Education Planning." *Learning for Aging*, ed., Stanley Grabowski and W. Dean Mason, Adult Education Assoc. of U.S.A., p. 179.

<sup>16</sup> *Ibid.*

<sup>17</sup> Woodrow W. Hunter, "Trends in Pre-retirement Education." *Pre-retirement Counseling Conference*. (California State Polytechnic College, San Dimas, California, 1962), p. 2.

<sup>18</sup> *Ibid.*, separate edition, p. 2.

<sup>19</sup> *Ibid.*, p. 2.

<sup>20</sup> *Ibid.*, p. 8.

<sup>21</sup> *Ibid.*, p. 3.

<sup>22</sup> *Ibid.*, p. 4.

<sup>23</sup> Robert C. Atchley, *The Social Forces in Later Life*. (Belmont, Calif.: Wadsworth Publishing Company, Inc., 1972), pp. 160-161.

<sup>24</sup> Woodrow Hunter, "Trends in Pre-retirement Education," p. 4.

<sup>25</sup> William L. Mitchell, "Lay Observations on Retirement," in *Retirement*, ed., Frances Carp (New York: Behavioral Publications, Inc., 1972), pp. 212-213.

<sup>26</sup> Woodrow Hunter, "Trends in Pre-retirement Education," p. 2.

<sup>27</sup> Interview with Sr. Mary Bush, Sacred Heart Sisters, (Washington, D.C.) Feb. 24, 1976.

<sup>28</sup> Interview with Msgr. Charles Ritty, Delegate for Retired Priests, Diocese of Cleveland, Ohio, Jan., 1977.

<sup>29</sup> Rev. Philip Hannan, "The Canonical Concept of *Congrua Sustentatio* for the Secular Clergy," (Ph.D. dissertation, Catholic University of America, 1950), pp. 181-182.

<sup>30</sup> John Abbo and Jerome Hannan, *The Sacred Canons*, Vol. II, revised edition (St. Louis: B. Herder Book Co., 1957), p. 693.

<sup>31</sup> *Ibid.*, pp. 693-694.

<sup>32</sup> Walter M. Abbott, S.J., Gen. Ed., *The Documents of Vatican II*, (New York: Guild Press, 1966), p. 420.

<sup>33</sup> Desmond J. Vella, "The Dilemma of Clerical Retirement," *Homiletic and Pastoral Review*, 68 (Aug. 1968), p. 941.

<sup>34</sup> Most Rev. Raymond Gallagher, *op. cit.*, *Proceedings of the Institute*, p. 3.

<sup>35</sup> Rev. Charles J. Fahey, "How to Make Retirement Purposeful Living," *op. cit.*, p. 60.

<sup>36</sup> *Ibid.*

<sup>37</sup> Most Rev. Raymond Gallagher, *op. cit.*, p. 3.

<sup>38</sup> Rev. Joseph Zuercher, S.J., *op. cit.*, p. 24.

<sup>39</sup> *Ibid.*

<sup>40</sup> Frank McG. Nugent, S.J., "The Disengagement Theory of Aging and Retirement Applied to Clergymen," (Ph.D. dissertation, Catholic University of America, 1975).

<sup>41</sup> Walter M. Abbott, *op. cit.*, p. 403.

<sup>42</sup> Included in the 169 Latin Rite Dioceses is the Abbacy of Belmont, North Carolina. Here the abbot has some of the prerogatives of a bishop, but only within a very limited territory. This is the only one of its kind in the United States.

<sup>43</sup> P. J. Kenedy, *The Official Catholic Directory*, (New York: P. J. Kenedy and Sons, Pub., 1976, ed.), pp. 1-3.

<sup>44</sup> Two responding dioceses (one large and one small) did not report the number of retired priests.

<sup>45</sup> Research Study conducted by the Diocese of Pittsburgh, Office for Research and Planning. Survey of priests regarding a group retirement home (1972).

<sup>46</sup> Ruth Bennett, Ph.D., "Retirement, A New Phase in the Lives of Diocesan Priests in New York (City)" (1976).

<sup>47</sup> Diocese of Providence, Rhode Island.

<sup>48</sup> Diocese of Cleveland, Ohio. The Delegate for Retired Priests, Msgr. Charles Ritty, has also devised a contractual agreement whereby the Senior Associates' parish duties and responsibilities are delineated. The Diocesan Delegate has also devised a job description for the position of Vicar or Delegate for Retired Priests.

<sup>49</sup> *Crux of the News*, "A Report on Priests' Retirement, U.S.A." September 27, 1968.



# Appendix I

BISHOPS' COMMITTEE ON PRIESTLY LIFE AND MINISTRY  
1312 Massachusetts Avenue, N.W.—Washington, D.C. 20005

28 January 1977

National Conference  
of Catholic Bishops

Your Eminence/Your Excellency:

In 1969 the National Conference of Catholic Charities sponsored an Institute on Planning for the Pre-Retirement and Retirement of Priests. During the course of that Institute numerous recommendations regarding pre-retirement education and retirement programming for priests were offered. In the eight years since the Institute there has been much progress with the formation of sophisticated programs for pre-retirement and retirement in most dioceses.

The Committee on Priestly Life and Ministry receives many requests for information regarding such programs. Often the information is not available to us and we have to refer the inquirers directly to dioceses. As Chairman of the Bishops' Committee on Priestly Life and Ministry, I feel that the information sought here will be of great value to the Committee in the formulation of recommendations to the NCCB. It will also indicate the progress of retirement programs since the Institute in 1969.

Father Walter Jenne of the Diocese of Cleveland, a student at the National Catholic School of Social Services at Catholic University, has prepared this Questionnaire. Father Jenne is working toward a Masters Degree in Social Work.

The enclosed Questionnaire is an attempt to ascertain:

1. to what extent the recommendations produced by that Institute are known and have been implemented;



2. what are the present pre-retirement and retirement programs and policies in our dioceses; and
3. those suggestions you might have with regard to the question of retirement for diocesan priests.

Would you be so kind as to forward this Questionnaire to that person or persons in your diocese responsible for Priests' Retirement Programming. We ask that it be returned to this Office by *February 28th, 1977*.

We appreciate your cooperation in this matter as the results will be beneficial to the Most Reverend Ordinaries in any future planning or updating of their retirement policies.

With every good wish, I remain

Very sincerely yours,

/s/ + R. J. Gallagher  
Chairman

## Appendix II

BISHOPS' COMMITTEE ON PRIESTLY LIFE AND MINISTRY  
1312 Massachusetts Avenue, N.W.—Washington, D.C. 20005

3 March 1977

National Conference  
of Catholic Bishops

Your Eminence/Your Excellency:

On January 28 we mailed you a Questionnaire concerning Pre-Retirement and Retirement Programs for Diocesan Priests (copy enclosed). The requested date of return was February 28; presently, 50 percent of the dioceses have responded.

As of this date, however, we have not received a return from your diocese. If you wish to participate in this survey may we ask you to forward the enclosed explanatory letter and Questionnaire to the person(s) responsible for this information.

As there are many statistical computations to be done, it is necessary that we receive the Questionnaire by March 15th.

I wish to thank you for your cooperation in this project. We believe the findings will be helpful to the most Reverend Ordinaries for future planning in an area which intimately effects the lives of our priests.

Very sincerely yours,

/s/ + R. J. Gallagher  
Chairman



## Appendix III

# BISHOPS' COMMITTEE ON PRIESTLY LIFE AND MINISTRY

### SURVEY ON PRE-RETIREMENT AND RETIREMENT PROGRAMS FOR DIOCESAN PRIESTS

Instructions: The purpose of this questionnaire is to elicit information about current pre-retirement and retirement programs for Diocesan Priests in the Roman Catholic Dioceses of the United States.

#### SECTION I: IDENTIFYING INFORMATION

1. Respondent's name .....
2. Name of Diocese ..... 3. State.....
4. Respondent's position(s) (e.g., Bishop, Chancellor, Vicar or Delegate for Retired Priests, Personnel Board Member)  
.....
5. Address .....  
.....  
Street  
.....  
City State Zip
6. Telephone #...../  
area code
7. Does your diocese have a priest serving as delegate or vicar for retired priests?  
YES 1. ( ) NO 2. ( )  
If YES: Are you that person?  
YES 1. ( ) NO 2. ( )
8. Is this appointment full time: 1. ( ) or part time: 2. ( )

9. Are you aware of the Institute on Planning for Pre-retirement and Retirement of Priests sponsored by the National Conference of Catholic Charities in 1969?  
YES 1. ( ) NO 2. ( )
10. Did you attend the Institute?  
YES 1. ( ) NO 2. ( )  
IF NO: Did another representative of your diocese attend this Institute?  
YES 1. ( ) NO 2. ( )
11. Do you have a copy of the proceedings of the Institute?  
YES 1. ( ) NO 2. ( )
12. Were the recommendations offered at the Institute incorporated into your present Diocesan Retirement Policy for Priests?  
Very Little 1. ( )  
Somewhat 2. ( )  
In Large Part 3. ( )  
Do Not Know 4. ( )
13. Total number of diocesan priests in your diocese is: .....
14. Total number of retired diocesan priests from your diocese is: .....
15. Total number of diocesan priests living in retirement outside your diocese is: .....
16. Total number of diocesan priests living in retirement in the diocese is: .....

## SECTION II: PRE-RETIREMENT PROGRAM FOR DIOCESAN PRIESTS

17. Does your diocese have a pre-retirement program for priests?  
YES 1. ( ) NO 2. ( )  
[If the answer to # 17 is YES, then answer the remaining questions in this section, if the answer to # 17 is NO, then move on to question # 3.]
18. Is this pre-retirement program conducted on:  
individual basis 1. ( )  
group basis 2. ( )  
both individual and group basis 3. ( )



19. If you were to describe the pre-retirement program in your diocese, would you say it is:

Limited 1. ( ) [explains the pension program and other benefits, the retirement timing options, and living arrangements.]

Comprehensive 2. ( ) [attempts to go into depth, and treats such topics as physical and mental health, optional ministerial roles in retirement, leisure activities and the legal aspects of retirement.]

20-23. Briefly describe your diocesan pre-retirement program. (e.g., whether it is conducted individually with each priest or in group sessions, age at which it is available to priests, subject matter presented, etc.) .....

.....  
.....  
.....

24. As part of your diocesan pre-retirement program is there any co-ordination of efforts between diocesan departments or offices? (e.g., Joint program planning between Personnel Board, Senate of Priests, Office of Continuing Education, and Priests' Retirement Board.)

YES 1. ( ) NO 2. ( )

IF YES: Then briefly describe .....

.....  
.....

Please check off as many of the following as apply to your diocese.

25. ( ) Our program includes a gradual shifting of roles in the parish ministry as a man approaches retirement (e.g., less administration and more involvement with individuals and groups).

26. ( ) We make use of retreats and workshops as part of our program.

27. ( ) Our program allows for a sabbatical leave giving the priest an opportunity for developing new in-

terests and allowing more time for reading and writing.

28. ( ) As part of our program we make use of career consultation or guidance services to help the priest assess his assets and explore other priestly roles.

29. ( ) Our program includes seminars for priests periodically throughout his years of priestly service on the aging process.

30. ( ) Other, please describe .....

.....

.....

.....

31. If you do not currently have a pre-retirement program for priests, do you have a plan and projection to implement such a program?

YES 1. ( ) NO 2. ( )

IF YES: Then briefly describe the program and when you plan to implement it .....

.....

.....

.....

32. If your diocese has its own seminary (College and/or Theology), does the seminary education include concepts concerning the aging process and retirement as well as an explanation of the diocesan retirement policy?

YES 1. ( ) NO 2. ( )

### SECTION III: RETIREMENT PROGRAM FOR DIOCESAN PRIESTS

#### A. Policy

33. Does your diocese have a definite retirement policy that is clearly stated and followed?

YES 1. ( ) NO 2. ( )

If YES: Did the priests of the diocese or their representatives participate in the formulation of this policy?

YES 1. ( ) NO 2. ( )

**B. Financial**

34. Does your diocese have a pension plan for retired priests?  
YES 1. ( ) NO 2. ( )

If YES: Please specify the monthly pension allowance for a retired priest. \$.....

35. If the monthly pension allowance varies according to living arrangements or for other reasons and circumstances, please explain. ....  
.....  
.....  
.....

- 35A. What other benefits are provided for retired priests (i.e., Blue Cross, Blue Shield, Major Medical, etc.) Please List.  
.....  
.....  
.....

The priest retirement pension fund receives funds from the following sources: (CHECK ALL WHICH APPLY)

36. ( ) each priest contributes to the fund.  
37. ( ) the parish or institution to which the priest is assigned contributes to the pension fund.  
38. ( ) there is an annual diocesan collection in all the parishes for the pension fund.  
39. ( ) non-contributory, funded by the diocese.  
40. ( ) other, please explain .....  
.....

**C. Retirement Age**

Priest's retirement from full-time work in your diocese is:

41. ( ) mandatory at a certain age; please specify age .....
- 42-43. ( ) possible at a given age (e.g., 65), please specify age ....., and mandatory at age .....
44. ( ) determined individually for each priest.

#### D. Living Arrangements

Of the following living arrangements for retired priests, check as many as apply in your diocese:

- 45. ( ) diocesan residence for retired priests.
- 46. ( ) diocesan homes for the elderly.
- 47. ( ) residing in last parish assigned.
- 48. ( ) residing in rectory of choice, if room is available.
- 49. ( ) residing with family or friends.
- 50. ( ) residing in another state.
- 51. ( ) residing in one's own home or apartment.
- 52. ( ) other, please specify .....

Which of the above (#44-51) are the three (3) most common practices in your diocese?

- 53. ....
- 54. ....
- 55. ....

#### E. Ministerial Roles in Retirement

In your diocese, which of the following options for continued involvement in the ministry are available to the retired priest? (CHECK ALL WHICH APPLY)

- 56. ( ) pastor emeritus.
- 57. ( ) part-time parish work.
- 58. ( ) chaplaincy positions.
- 59. ( ) retreat work.
- 60. ( ) counselling.
- 61. ( ) giving conferences.
- 62. ( ) offering Mass and hearing Confession.
- 63. ( ) CCD work.

- 64. ( ) visiting hospitals and the elderly.
- 65. ( ) writing and reviewing.
- 66. ( ) consultant to other priests.
- 67. ( ) spiritual direction.
- 68. ( ) convert instructions.
- 69. ( ) other, please specify .....
- .....
- .....

**F. Miscellaneous**

Does your diocese maintain regular contact with retired priests by: (CHECK AS MANY AS APPLY)

- 70. ( ) Vicar or Delegate for retired priests.
  - 71. ( ) official diocesan chancery communications.
  - 72. ( ) special newsletter for retired priests.
  - 73. ( ) invitations to special diocesan and/or parish functions (e.g., Ordinations, Confirmations, Eucharistic Devotions, Ordination anniversaries).
  - 74. ( ) invitations to clergy conferences and continuing education workshops.
  - 75. ( ) periodic individual conferences with retired priests by the Bishop's delegate, or the Bishop himself.
  - 76. ( ) special periodic workshops or seminars for retired priests.
  - 77. ( ) representation of retired priests on the Senate of Priests.
78. Does your diocese have an official, annually updated register or listing of the names and addresses of retired priests that is mailed to all priests of the diocese?  
YES 1. ( ) NO 2. ( )
79. Have there been any research studies conducted in your diocese regarding the activities and needs and attitudes of retired priests?  
YES 1. ( ) NO 2. ( )



IF YES: Briefly describe the nature of the studies and findings. ....  
.....  
.....

80. Which of the following categories best describes the overall response of the priests in your diocese to the concept of retirement?

positive 1. ( )

mixed 2. ( )

negative 3. ( )

81. Do you have any additional comments or suggestions

.....  
.....  
.....  
.....  
.....

If you have a brochure describing your pre-retirement and/or retirement policy, we would appreciate a copy of it.

Please return by Monday February 28 to:

Bishops' Committee on Priestly Life and Ministry

1312 Massachusetts Avenue, N.W.

Washington, D.C. 20005

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