

ARCH SUPPORT

Issue 126

September 2016

From The Desk Of The Chancellor...

In my column back in May, I described the opportunity that the Archdiocese was given by the Lilly Endowment to study leadership and economic challenges impacting our pastoral leaders. During the summer months, we conducted written surveys and hosted focus group discussions for priests and lay ecclesial ministers. During this study process, we asked questions about leadership competencies, desired in-service training, financial management skills, personal finances, and retirement planning. Participation was voluntary but enthusiastic; we heard from a great percentage of our parish leaders as well as archdiocesan leadership staff.

Our research identified challenges in four areas.

I. Need for Comprehensive Leadership Development. Both our priests and lay ministers expressed high satisfaction with their pastoral skills such as listening, collaboration, communications, and spiritual leadership. However they reported low satisfaction with parish financial management, fundraising, recruiting volunteers, stress management, and managing conflict. While recognizing these areas of needed improvement, both groups noted the difficulty of participating in professional development due to lack of time, heavy workloads, and limited resources.

II. Need for Improved Organizational Financial Literacy. Priest and lay ecclesial ministers reported a lack of training and some degree of vulnerability regarding their ability to manage finances as part of their job responsibilities. We heard suggestions of a type of dualism between ministerial activity vs. administration and finances. Many priests and lay ministers experience administrative tasks as a burden or a restraint that they see as contrary to their call to



serve. By comparison, some parish business managers and diocesan leaders see the need for better organizational systems, yet find their more ministry-focused colleagues resistant to good business practices.

III. Lack of Personal Financial Literacy. As found in similar studies of the general public, our pastoral leaders struggle to save money and have accumulated significant debt. A high percentage of study participants reported having less than 6 months of required expenses in savings. Debt is an apparent liability for many. In addition to home mortgages, we learned that education debt, car loans, and credit card debt are very common. Many of our colleagues have no financial plan, and there is great confusion about matters such as taxes and investments.

IV. Concerns about Retirement Readiness. Our research found many partici-

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Love. Grow. Serve.

pants are concerned about how they will be able to afford to retire. 83% of priests surveyed and 74% of the lay ministers studied were above age 50, yet half of our priests and lay ministers have less than \$100,000 saved for retirement. Fears about stable financial futures are well founded.

This data, along with the other information gathered during the study this summer, was used to prepare a 3-year grant request that was submitted to the Lilly Endowment in August. If approved, the funds we receive will be used to design and implement a number of new training programs for our priests and lay ministers. Some of the programs will likely be designed to build leadership competencies, while others will focus on financial management skills and build personal financial literacy. Good leadership and financial skills can lead to improved mission effectiveness.

In addition to training opportunities, we hope to provide parishes with assistance to complete a discernment process to identify desired areas of parish growth. Such a process would allow each community to evaluate their strengths and imagine how they might build on those strengths over the next 5-7 years.

A third use of the grant will be to redesign our employee retirement program. Changes will likely occur in enrollment eligibility, investment options, vesting, and employer contributions. Our hope is to facilitate greater personal savings over a longer period of time, allowing for a more secure retirement.

Finally, the grant will allow us to create a ministry support fund to provide direct assistance for our pastoral leaders facing a severe financial crisis. Of course, many of these plans depend on obtaining the grant. We have received good feedback about our research and proposed plans, so we are very optimistic about our chances. We should hear news by early December. Thanks to all who helped by participating in the research study.

NEWS FROM THE FINANCE OFFICE

Enclosed please find the revised forms as listed below:

Archdiocese of Louisville Stock Donation Form – Effective immediately Morgan Stanley will process all stock donations.

Parish/School Transmittal Form – recently updated to change a few general ledger account numbers that will assist in processing Propagation of Faith payments.

The forms are also available on the website at

www.archlou.org



2016 CATHOLIC SERVICES APPEAL



September traditionally marks the season when nature hints of cooler days just ahead.

It's also the season when advance prepara-

tions are heating up for the Archdiocese of Louisville's annual Catholic Services Appeal.

Pope Francis states, "Everyone is called, everyone is sent." We are both called, and sent to carry out the ministries of the Archdiocese on a daily basis through our work, interactions with others, and advocating for the Catholic Services Appeal.

The goal for the 2016 Catholic Services Appeal is \$3,500,000. As employees of the Archdiocese, each of us, and those we serve, are positively impacted by the thousands of donors who give so generously to the Appeal. Please consider donating to this year's Catholic Services Appeal.

Your gift, in any amount, is greatly appreciated and will mean so much to those we serve.

Did you know...

- ⇒ CSA provides funding for every Archdiocesan ministry and service, including schools
- ⇒ Seminary education costs for our future priests are supported by donations to CSA
- ⇒ Priest retirement costs are supported by donations to CSA
- ⇒ Every parish in the Archdiocese directly benefits from donations to CSA
- ⇒ The 2015 CSA campaign was our most successful ever, raising more than \$3,600,000
- ⇒ Donors may spread their CSA gift pledges over as long as 9 months
- ⇒ Online giving is the fastest growing method of donating to CSA (www.ArchLou.org/CSA)
- 100% of every dollar donated to CSA is used for ministries and services (general support costs are covered by Archdiocesan investment income)
- ⇒ For those unable to give to the 2015 Appeal, your gift to the 2016 CSA will be matched through an anonymous donor's generous matching commitment
- ⇒ Every gift to CSA is appreciated and helps bring Christ to others; *no gift is too small!*

For more information on the Catholic Services Appeal, visit www.ArchLou.org/CSA or contact Sarah Wunderlin at swunderlin@archlou.org



"Some of you said: this system can no longer be endured. We must change it; we must put human dignity again at the center and on that pillar build the alternative social structures we need. It must be done with courage, but also with intelligence, with tenacity but without fanaticism, with passion but without violence. And among us all, addressing the conflicts without being trapped in them, always seeking to resolve the tensions to reach a higher plane of unity, peace and justice." -- Pope Francis 10/28/14

FOOD SERVICE NEWS

MARK YOUR CALENDAR

SEPTEMBER

September 17	Constitution Day
September 21	International Peace Day
September 22	First Day of Autumn
September 28	World School Milk Day

OCTOBER

National Book Month
National Pizza Month

October 10-14	National School Lunch Week
October 16	National Boss' Day
October 26	National Pumpkin Day
October 28	National Chocolate Day

NOVEMBER

National Diabetes Month
Peanut Butter Lovers Month

November 20-26	National Family Week
November 1	All Saints Day
November 6	Daylight Savings Time Ends
November 8	Election Day
November 11	Veterans Day
November 24	Thanksgiving Day

PROFESSIONAL DEVELOPMENT

There are also some new webinars on the School Nutrition website. Click the link below to register.

<https://schoolnutrition.org/Webinars/>

If you haven't checked out the Institute of Child Nutrition website (formerly NFSMI) lately, there are several new online classes available that count toward CEU credits for your SNA certification. Just click on the link below.

<http://www.nfsmi.org/Templates/TemplateDefault.aspx?qs=cEIEPTIzOA==>

WELCOME BACK!!!

We started the 2016/17 school year off with a new cafeteria point of sale system, a new online meal payment system and a new online meal application system. WOW!!! So far we have to say, that barring the normal (and some abnormal) computer glitches, the changes have gone smoothly. We hope everyone is keeping that positive attitude that will inevitably flow out into your lunchroom so that the students are not troubled by these few irritations that have occurred, and realize that there will most likely be more glitches to come. That is the nature of all things computer. With that being said, please remember that if parents are reporting any problems with the online payment system, (EZ PAY) they need to call 866-693-9729 or email info@spsezpay.com, as it is a third party company. Everyone have a great year!!

HOUSEKEEPING

Your end of month paperwork is due on the 5th of every month regardless of holidays or days off from school. Susan Wittenauer sent each cafeteria manager a new check list so you will know what to send.

KEEP IN MIND

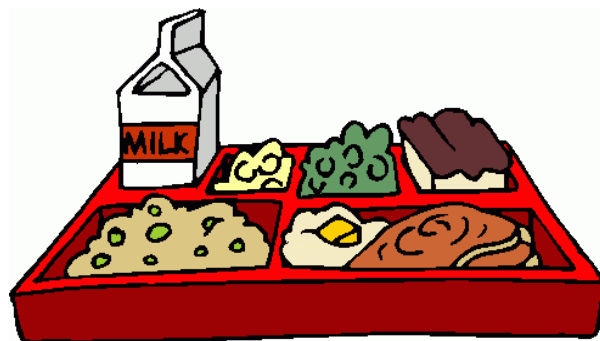
Please check your email every morning for commodity and DOD delivery dates.

When commodity deliveries are scheduled, Southern/Reinhart Foods delivery window (per contract) is from 6:30 A.M. until 3:30 P.M. You must be available to receive these deliveries or make arrangements to have someone available to receive them for you.

DATES TO REMEMBER

Cafeteria Manager Meeting:

- *Wednesday, November 16th, at 2:30 P.M. at the Maloney Center*
- *Thursday, November 17th, at 2:30 P.M. at Bethlehem High School*



CATHOLIC ARCHDIOCESE EMPLOYEES RETIREMENT PLAN FIFTH THIRD 401K PLAN EDUCATION MEETING

Presenter: **Trinity Potter Givens from Fifth Third Bank.** Trinity normally holds the education sessions to approximately one hour. There will be time for questions individually after the meeting.

Please share this information with all your employees so they can mark their calendar and plan to attend.

Wednesday, September 28, 2016

4:00 pm

Saint Agnes Parish

Aloysius Hall

(When guests park their cars, have them look at the side of the church to locate the green awning labeled *Aloysius Hall*, it's across from the Parish Office building)

We will also try and plan one or two education sessions in the Fall.

401K ELIGIBLE ENTRY PERIOD – OCTOBER 1ST

A reminder to make sure employees that have met eligibility requirements and will be eligible to participant in the Plan effective 10/01/2016 are verified to ensure they are included in your October 14th retirement file transmission.

Also current and newly eligible employees may elect to begin making employee contributions to the Plan at this time. Please make sure your employees are aware of this information and offer them the benefit of taking advantage of this opportunity to plan for their future. If you have any questions, please contact Phyliss Wilkins at the Chancery Personnel and Planning Office.

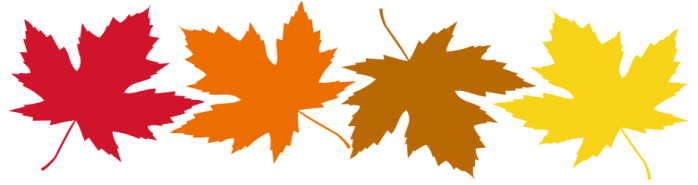


SUBSTITUTE TEACHER PAYROLL

Effective with the 2016/2017 school year a new pay group for the **substitute teachers that are listed on the archdiocesan sub list** was created. We have processed two payrolls thus far. Just a reminder to please send timesheets in accordance to the dates listed on the Parish Payroll Calendar and to make sure that the principal or business manager/bookkeeper has signed off on all time worked by these subs. Invoices will be sent out at the end of each month for those schools who did have subs with the amount owed to the Archdiocese drafted on the last business day of that month. If you have any questions, please contact Ashley Hall at the Chancery Personnel and Planning Office.



meetings



ARCH SUPPORT MEETINGS

OCTOBER ANNUAL BENEFIT MEETINGS

Tuesday, October 25, 2016

1:00 pm

Chancery Meeting Room #3

Wednesday, October 26, 2016

10:00 am

Chancery Meeting Room #3

Wednesday, October 26, 2016

1:00 pm

Chancery Meeting Room #3

Thursday, October 27, 2016

10:00 am

Saint Joseph Parish Hall – Bardstown

Wednesday, November 2, 2016

10:00 am

Chancery Meeting Room #3

*Please note these October meeting dates are the **2017 Annual Benefit Meetings**. A representative from each group participating in the benefit program is required to attend one of these meetings.

DECEMBER MEETINGS

Tuesday, December 6, 2016

10:00 am

Chancery Meeting Room #3

Wednesday, December 7, 2016

10:00 am

Saint Joseph Parish Office - Bardstown

HIGH SCHOOL FINANCE DIRECTORS ROUNDTABLE

Tuesday, October 11, 2016

11:30 am

Hosted by: Jan Durbin

Mercy Academy

RSVP and agenda items to:

jdurbin@mercyjaguars.com

ARCH SUPPORT

ON THE WEB!

To read this newsletter online or print additional copies: Go to the archdiocesan web site www.archlou.org

- Click on "About the Archdiocese."
- Click on "Publications/Media"
- Click on "Download and View Documents"
- Choose Specific Issue

