

ARCH SUPPORT

Issue 135

May 2018

From The Desk Of The Chancellor...

During the month of May, leaders in our parishes and schools complete a number of tasks to wrap up the school year and eventually to close out the fiscal year in June. Finalizing budgets, employee changes, and year-end reports all fill our lists of “things to do.” Among the tasks is reviewing your employee and volunteer database for safe environment indicators to confirm that the database is accurate and up-to-date. The report on background checks and training attendance needs to be reviewed, updated, and returned to Scott Fitzgerald as soon as you are able, but no later than the first week of July.

Earlier this month we convened parish contact persons to review our safe environment policies and assist them with preparing their reports as a part of our annual audit. This year the auditors from the United States Conference of Catholic Bishops will conduct onsite visits, so we want to have a precise paper trail for the auditors to review.

At these meetings, we reported on some of the findings from a recent parish survey that sought to measure where we need to improve our efforts.

Here are a few of the results:

1. Level of knowledge of policies by staff, volunteers and parishioners:

*** High Level: 53% * Some Knowledge: 42%**

This is generally good news, but it is an indicator that we need to improve our communication efforts so everyone is aware of our commitment to keep our parish and schools safe for children. Everyone also needs to be aware that we have policies in place to report abuse.

2. Does pastor/principal/other staff know when and how to report allegation of abuse?

*** Yes: 89%**

The obligation to report suspected child abuse is not only church policy but also state law. Our printed materials and web page provide detailed procedures and all the necessary phone numbers.



3. Is safe environment training provided for clergy, employees, volunteers, children?

*** Yes: 92%**

Parishes are clear on training programs for adults but need reminders about required and optional programs for children and youth.

4. Do pastors ensure that background checks are conducted?

*** Yes: 90%**

Again, this is generally a good score, but increasingly these checks are conducted, and pastors are not always kept informed of what is occurring. These initiatives can be mistakenly taken for granted, and we all need to stay vigilant.

5. Does the pastor ensure visiting clergy are “clergy in good standing?”

*** Yes: 96%**

This is excellent with only slight improvement needed.

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6. Do you feel the Archdiocese adequately communicates policies on safe environment?

* **Yes:** 83%

We have more work to do here. Printed and online materials are widely known, but additional communication of policies is needed. Our expanded use of our newsletter will be a start, and parishes will be encouraged to use their bulletins more often to share this information.

7. Do you feel comfortable communicating with archdiocesan offices on questions/concerns regarding safe environment?

* **Yes:** 98%

This result was great to hear. Martine Siegel, our Victim Assistance Coordinator, and Scott Fitzgerald, our Safe Environment Coordinator, are doing a terrific job and are supported by our Office of Catholic Schools, Office of Faith Formation, and Personnel Office staff.

8. Does your parish send out the *Honor Thy Children* newsletter?

* **Yes:** 23%

This was our lowest score. We prepare a very fine newsletter each month, but it is not adequately distributed. This publication serves as ongoing education and provides a regular reminder of the need to stay attentive and aware of the issues of abuse in the church and in the wider society. With the help of our parish contact persons, we hope to distribute this newsletter to the email or postal boxes of all of our staff and volunteers. Back copies are included on our web page, and we will be preparing an index for the back copies so that topics are easier to locate.

These are just some of the survey findings. We will use the entire report to upgrade and expand some of our efforts. We are grateful to the pastors and others who sent us responses.

In order for our audit report to be on time, your annual parish and school reports are due by July 6, 2018. Please return the Curriculum Report and Database changes to Scott Fitzgerald (sfitzgerald@archlou.org) and the Summary Audit Report to Nancy Marx (nmarx@archlou.org).

Thanks for the efforts of everyone who works to ensure a safe environment, to restore trust, and to honor our children. May God bless our work!



NEW ALCOHOL REGULATIONS

The Alcohol Licenses and Awareness Training was on April 24, 2018. Those that attended learned there are a few changes in the laws. Listed below are some of the changes discussed:

A special temporary alcoholic beverage auction license shall authorize the holder to:

- Purchase, transport, receive, possess, store, sell, and deliver alcoholic beverages to be used for auction or raffle or sold to be consumed

at charity or nonprofit events.

- Includes specially labeled bottles of alcoholic beverages.
- Notwithstanding any other provision of KRS Chapters 241 to 244, a distiller, rectifier, winery, small farm winery, brewer, microbrewery, wholesaler, distributor, or retailer may donate, give away or deliver any of its products to a charitable or nonprofit organization possessing a special temporary alcoholic beverage auction license under this section.

For more information go to: <https://abc.ky.gov>, to read the new law go to: <http://lrc.ky.gov/STATUTES/statute.aspx?id=45934>



INTERESTED IN ONLINE AND MOBILE GIVING AT YOUR PARISH?

LUNCH AND LEARN SERIES

Is your parish interested in learning more about online giving and the different vendor programs available? Are you currently using an online giving program but

interested in learning more about alternative options available?

The Office of Mission Advancement has arranged for three highly established vendors to come in and share information about the process and products available.

All sessions will be hosted at the Archdiocese of Louisville's Pastoral Center from 12:00–1:30pm, with lunch provided.

Tuesday, June 19 – Our Sunday Visitor

Tuesday, June 26 – LPI

Wednesday, July 11 – Vanco

Make plans to attend any and all sessions that are of interest! Parishes are welcome to send more than one representative if desired.

Please RSVP at least 1 week in advance to Sarah Wunderlin at swunderlin@archlou.org or call 502-585-3291 to reserve your spot today.



TAKE NOTE....FROM BRAD HARRUFF, CATHOLIC MUTUAL CLAIMS/RISK MANAGER

- It's Parish Festivals and Picnic season so we all need to put our best foot forward for our parishioners and guests.
- Our Church safety managers have been focusing on providing a safe environment and may have already supplied you with the festival safety and management materials. If not, I am forwarding our festival guidelines to your location via parish mailing and web mail. As is the case with our Worker's Compensation claims, trips and falls are our number one loss problem and we need to pay particular attention to this.
- Please take the time to examine your campus prior to the festival to consider the best use of parking space, traffic patterns, sidewalk, parking lot issues, and lighting.
- In the meantime, the archdiocese will be forwarding a copy of the latest alcohol training session to train your bartenders.
- Reach out to our office with any questions.



CONSTRUCTION AND RENOVATION PROJECTS

As we move through these spring months, through the end of the school year and into summer months when the temperatures feel like we are already in mid-summer, this becomes a very active time in our parishes for construction and renovation projects. Subsequently, as a result, the Archdiocese of Louisville, Office of Facilities Management, also gets very busy with these same type projects.

With this increase in activity, a review of the Renovations and New Construction Policy is in good order. There have been some changes to the policy that went into effect in July 2016. The full Renovations and New Construction Policy can be found on pages 75-79 of the August 2016 Financial Policies and Procedures Manual. You can access the full manual online at the Archdiocese of Louisville Web page, www.archlou.org. It is located under the drop-down box titled “Services”, then click on the drop down box titled “Services Directory”, then scroll down and click on the “Finance Office” then scroll down under “Links” and click on “Financial Policies and Procedures Manual”, then click on the teal link titled “Financial Policies and Procedures Manual”. This will open a pdf file for the entire Financial Policies and Procedures Manual. Once the pdf is downloaded, go to page 75.

Here are just a few of the questions most frequently asked:

- Q. What dollar amount requires us to get approval from the Archbishop?
A. Any project in excess of \$20,000.00.
- Q. Do we have to seek the Archbishops approval for projects covered by proceeds from Catholic Mutual?
A. Yes, any expenditure on a parish facility over the \$20,000.00 threshold needs to be submitted to the Archbishops office for approval. Where the funds come from is relevant information to be included in the request for approval letter sent to the Archbishop.
- Q. What types of projects require us to get approval from the Archbishop?
A. New Construction, Renovations, Demolition, Changes to the Interior and/or Exterior, Extraordinary Repairs (**even if covered by insurance**), Purchase of Property and/or Furnishings.
- Q. What information do we need to provide to the Archbishop when we submit a request for approval?
A. There are four (4) pieces of information that need to be included with a parish’s letter of request:
 1. A brief description of the project;
 2. The total cost of the project (Include copies of **all** bids received; minimum of three (3) required.)
 3. The source of funding for the project;
 4. A copy of the Parish Council, Finance Council and/or School Board minutes showing review and approval of the project.

The one thing that slows the approval process the most is an incomplete packet of information on the project. This sometimes causes multiple inquiries seeking additional information.

If you have any questions or need help reviewing projects and project requests for your facilities, please feel free to contact Bill Zoeller, the Archdiocese of Louisville Director of Facilities. Bill can be reached at the Maloney Center, 502-636-0296 x1227 or by email at BZoeller@ArchLou.org.



SUMMER TRAVELING

Remember Reliance offers 24/7 Travel Emergency Companion Services. See the enclosed flyer for details, as well as a cutout travel card to put in your suitcase or wallet!

SUMMER HOURS



Once again, Archdiocesan agency office hours will be adjusted for a ten-week period this summer. Effective Monday, June 4 and continuing through Friday, August 10, each department will extend their workday by thirty minutes in the morning or afternoon and shorten their lunch break to 45 minutes to allow the offices to close on Fridays at 12:30 PM.

MILEAGE RATE

Effective July 1, 2018, the Archdiocese of Louisville reimbursement rate for business related travel will **increase** from 53.5 cents to a new rate of 54.5 cents. Please be sure to change your mileage reimbursement rate forms to reflect this change for all mileage **incurred** after July 1, 2108.



FINANCE OFFICE NEWS

The updated fiscal year checklist for June 30, 2018, is now available on the Archdiocese of Louisville website. See Fiscal Year-End Reports Due Chancery for Parish and School 2018 at <https://www.archlou.org/financial-policies-and-procedures-manual/>.

The checklist will need to be completed, with information requested, and submitted to the Archdiocese Finance Office by August 15, 2018. The checklist and reports may be submitted by mail or email. Please contact Margaret Kopatz Kraus if you have any questions or need assistance.

Please note:

- Copies of the parish/school financial statements can be mailed or emailed in PDF format.
- The inventory of personal property of the pastors and others on parish/school property should be updated. The copy of this inventory should be **kept on file** at the parish or school. The inventory **does not need to be submitted** to the Finance Office.

The Assessment worksheets are also available on the Archdiocese Finance Forms Website. See Accounting Forms at website link listed above. Please note the following changes:

- The cafeteria USDA reimbursement income will not be assessed, if applicable.
- The Ordinary assessment has been reduced to .25.
- The total assessment will be 6.5% of total income less approved deductions.

SUMMER WORKSHOPS FROM FINANCE AND PERSONNEL OFFICES

- ⇒ Tentative Dates: Tuesday, July 18, 2018 and Wednesday, July 19, 2018
- ⇒ Where: Pastoral Center
- ⇒ Theme: “How To” mini workshops. Let us know of things you would like “How To Do” or “How to improve or better understand”! Look for further information on times and topics!





meetings

ARCH SUPPORT MEETINGS

August 2018

Tuesday, August 21st
10:00 a.m.
Saint Joseph Parish Office— Bardstown

Wednesday, August 22nd
10:00 a.m.
Pastoral Center

December 2018

Tuesday, December 4th
10:00 a.m.
Pastoral Center

Wednesday, December 5th
10:00 a.m.
Saint Joseph Parish Office - Bardstown



OCTOBER 2018 ANNUAL BENEFIT MEETINGS

Wednesday, October 24th
1:00 pm
Pastoral Center

Thursday, October 25th
10:00 am
Pastoral Center

Thursday, October 25th
1:00 pm
Pastoral Center

Friday, October 26th
10:00 am
Saint Joseph Parish Hall - Bardstown

Wednesday, October 31st
10:00 am
Pastoral Center

Please note these October Meetings are the
2019 Annual Benefit Meetings.
A representative from each group participating
in the benefit program is required to attend one
of these meetings.



Arch Support

ON THE WEB!

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- Click on "About the Archdiocese."
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