

ARCH SUPPORT

Issue 161

May 2024

From The Desk Of The Chancellor...

The month of May brings parties and celebrations for Derby, graduations, First Communion, and weddings. Yet while we enjoy those events, we often must focus our administrative attention on the many changes and transitions that will occur in June and the summer months. This is the season for pastor and staff changes, the new fiscal year, building repairs, and planning for the new school year, which is just three months away.

As you move through these months, I suggest some approaches that may be beneficial as you manage whatever changes you will face. I propose four working principles that can help your planning be most effective.

Consultation is essential to good planning. Planning is an act of prioritizing, and effective consultation provides leaders with the insights to understand where there is the greatest need to set priorities accordingly. Many leaders prefer to initiate change, believing that shared decision making simply delays inevitable conclusions. However, taking time to review alternatives and build support will, in the end, allow plans to be implemented more quickly and easily. Good leaders invite the perspectives of others to be heard and allow the insights they hear to shape their own thinking. These more informed leaders are better able to be responsive, set strategic goals, and determine where opportunities exist for the greatest impact.

Wisdom lies within the community. Parishioners appreciate opportunities to give input in even simple matters of parish life. Yet, no matter how schooled someone may be in facilitation and how open they are to the experience of others, the loudest voices may shape the decisions of leaders, which can result in disappointed members. That is why employing methods that gather feedback from a wide variety of people are the most effective. Similar problems exist when even well-intentioned leaders are blinded by their own view of circumstances. Trusting in the power and wisdom of a group can result in leaders considering alternatives they might have otherwise missed.

Effective collaboration. Whenever leaders use consultation as a regular part of their planning efforts, and when making important decisions, there is increased support for any initiative. In the context of parish life, use of committee or councils does take longer to get a project completed, but support for the pastor and other parish leaders is built through collaboration. As parishioners develop a greater sense of ownership and become more engaged in parish life, their personal commitment of time and financial contributions are likely to increase as well.

Dissemination of accurate information. Good decision-making happens best when the initial steps of planning include the education of those involved, including those who will be impacted by the decision. Poor decisions are often made due to decision makers having insufficient or inaccurate information. Likewise, critics of decisions often make judgments based on flawed information. Engaging those most impacted by a decision in the careful analysis of the issues provides for the formation of new understandings. Effective consultation does not involve conducting straw polls or simple voting. It is best achieved through study, reflection, and an honest exchange of ideas.

Managing change, large or small, can be challenging. We are all creatures of habit and have a natural desire to maintain the status quo. If leaders recognize that change is a process, not an event, we can move through normal transition stages. There is no one approach to managing change, but it is common to notice four stages.

- 1) Resistance. Even when a change is positive, there is a shift from what is known to something unknown. This requires adjustments that can feel uncomfortable, at least at first.
- 2) Confusion. Resistance often leads to a time of questioning about what is happening, leaving a sense of doubt due to unfamiliarity. It can be frustrating since some answers are not readily available.
- 3) Integration. Eventually a stage of renewed optimism arrives. There is some new energy as efforts to look forward replace time examining the past.
- 4) Commitment. In the final stage of change, security and productivity return, and there is growing appreciation for whatever is new.

A key task for leaders is to walk with folks through these stages with an eye towards building a positive future, whether it be with a new pastor, new staff members, a new facility, a new budget, or a new group of students. I wish you happy months of planning!

Be sure to take some time off this summer for rest and recreation. You need it, and you deserve it. Let's continue to pray for each other.





We are excited to announce that **#iGiveCatholic will once again be offered in the Archdiocese of Louisville this year!** Many parishes and schools in the archdiocese took part last year in this national initiative dedicated to Catholic philanthropy and conducted each year on *Giving Tuesday*. In 2023, the campaign raised more than \$20 million for 1,870+ Catholic organizations across the country. Here in the Archdiocese of Louisville, participating parishes and schools raised over **\$220,000** to fund specific projects and improvements! This year, #iGiveCatholic falls on **Tuesday, December 3**. We will be participating with over fifty other dioceses nationwide in this effort to empower YOU - our parishes and schools - to help you raise critically important funds with an easy and fun day of giving.

We promise to do the heavy lifting for you by offering guidance, support, and training! The archdiocese will also cover the application fee for all parishes and schools who wish to participate!

Join us for one of two complimentary **Lunch N Learn Sessions** to learn more about the #iGiveCatholic program and to have your questions answered! Those who participated in 2023 are also encouraged to attend to share their experiences from last year and to discover tips and tricks for making this year even better!

- **Tuesday, July 23 – 11:30 am -- 1:00 pm at the Pastoral Center, Room 1A (3940 Poplar Level Road, Louisville)**
- **Thursday, July 25 -- 11:30 am – 1:00 pm at St. Joseph Parish Office Building in the 2nd Floor Maloney Room (310 W. Stephen Foster Ave., Bardstown)**

Find out how #iGiveCatholic works and how easy it is to be a part of the fun while raising additional funds for your parish or school project. Pastors, staff, and volunteers are welcome at these sessions!

To register for one of the July information sessions, please go to this link:

<https://www.archlou.org/igivecatholic-registration/>

If you have any questions or if you prefer to register by phone or via email, please contact Molly Keene Smith in the Office of Mission Advancement at 502-585-3291/mksmith@archlou.org.

(In order to plan for lunch, the deadline to register for the information sessions is Wednesday, July 17.)

Notes from the Finance Office – ParishSOFT Accounting

We trust everyone enjoyed the Derby festivities these past several weeks! I have appreciated my now three-month ride as Parish Liaison, and I strive to be available to assist parishes with one-on-one help. It is also crucial that we provide both direction and guidance to **ALL** parishes. In this edition of Arch Support I share the following:

- **Monthly Checklist** - this document was sent out in early April to all ParishSOFT Accounting users. Use it to ensure you are completing all the tasks to keep your financial records in good order.
- **Financial Recordkeeping** – For EACH MONTH: File your Deposits, including Posting reports to Church Office/PS Family Suite, Journal Entries, Payroll reports, Timesheets, changes to Payroll for that run (ex: salary changes with approval), Bank Reconciliation reports, Bank Statements, Voided Checks. Paid invoices and check requests should be filed by vendor in those files. Every parish is asked **to begin filing in this way** and retroactively reviewing and re-ordering records for the 2023-2024 fiscal year.
- **Bank Reconciliations** – Complete your bank reconciliations **within 45 days of the last day** of that month. Bank Recons guarantee you have entered all deposits, all electronic payments, and automatic withdrawals.
- **Close the Month** – Close the month in PSA as indicated in the checklist. **WHY?** This not only locks down the transactions that have been reconciled, but also affects reports and entries. PSA will default to the open month, reducing the need to key in the current month, and reports will default to that open month. The month can be quickly reopened for you if needed by calling our offices.
- **Electronic Payments & Deposits** – Enter these checks and deposits with correct date for ACH entries to ParishSOFT. The bank recon will not show dates of activity beyond the month of the bank statement.
- **Personnel Files** – Use the Employee Enrollment Checklist from Human Resources to ensure you have all the required documents for each employee. Many of those same documents are required for part-time employees too. Review your personnel files – make sure all docs are filed for each employee.

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Notes from the Finance Office – ParishSOFT Accounting

DID YOU KNOW?

Recon Screen – You can add in the interest and service charge as you enter the ending balance and date when starting the recon. This saves having to create the JE...PSA does that FOR YOU!

You can sort the on-screen entries by type (default), but also by number, amount, date, or even comment. This is helpful when you are searching for a transaction. You can also use CTRL+F to FIND a specific entry; for example, when searching for the amount out-of-balance. CTRL+F can be used in multiple areas of PSA when searching for a specific entry.

Reports – in any of the report filters (EX: Department/ministry) you can select (and unselect) multiple items or fields by clicking on one, then using CTRL+CLICK to select others. Very useful when providing reports to a staff person with multiple areas of responsibility. It can be used for selecting multiple Account Numbers too, such as the assessment accounts, if desired.

Memorized...Reports, JE, Deposits, Bills – This tool is a huge time-saver – make sure to USE IT! Watch the Help Video to learn how or call me to help. On your PSA dashboard it will only show these based on the date so you may want to make this for the first day of the month so they are there as a reminder.

Thank you for all the work you do. The Archdiocese relies on the work and dedication of the business office staff to maintain accuracy both in the files and in the accounting database. I hope that providing everyone with tips & tricks as well as guidance helps us all toward that goal. Our shared gift of Administration is critical not only for the success of Business Managers and Bookkeepers, but for the entire well-being of the Parish and Archdiocese. THANK YOU – Mary Downs



Mileage Rate

Effective July 1, 2024, the Archdiocese of Louisville reimbursement rate for business related travel will increase from 65.5 cents to a new rate of 67 cents. Please be sure to change your mileage reimbursement rate forms to reflect this change for all mileage incurred after July 1, 2024.



Construction And Renovation Projects

With the opening of the new Catholic Charities Center on East Broadway this past February, last Fall and Winter were a very busy time for the Archdiocese Office of Facilities Management. This Spring, many of our parishes have been involved in some facet of reviving, renovating and refreshing some of their facilities on their campus. This has created numerous requests for capital expenditures, renovations and new construction projects.

With this increase in activity, a review of the Renovations and New Construction Policy is in good order. As well, there are some new changes to the policy that went in to affect back in August 2020. The full Renovations and New Construction Policy can be found on pages 75 through 79 of the August 2020 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", slide down and click on "Agencies and Facilities"; scroll down and click on Finance Office; scroll down and click on Financial Policies and Procedures Manual; then scroll down and click on [Download the full Financial Policies and Procedures Manual >](#). This will open the full "August 2020 Financial Policies and Procedures Manual".

FAQ:

Q. What dollar amount requires me to get approval from the Archbishop?

A. Any project or purchase in excess of \$20,000,

Q. What types of projects require me 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.

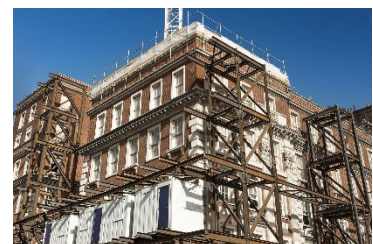
Q. What information do I need to provide to the Archbishop when I submit a request for approval?

A. There are five (5) pieces of information that need to be included in your pastor's request letter:

1. A brief description of the project establishing the need for the expenditure,
2. The total cost of the project (Include a copy of all bids received. A minimum of three (3) bids are required.),
3. Clearly state how the parish intends to pay for the project,
4. Clearly state the name of the contractor/bidder/vendor the parish wishes to use for the project; and,
5. Provide a copy of the Parish Counsel, Finance Counsel 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 give Bill Zoeller, the Archdiocese of Louisville Director of Facilities, a call. He can be reached at 502-583-3294.



Summer Office Hours

Once again, Archdiocesan agency office hours will be adjusted for a ten-week period this summer. Effective Monday, June 3 and continuing through Friday, August 9, 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.



Join Empower for a live webinar: Early career

The importance of setting financial goals, creating a budget, making debt payoff a priority, building a safety net, and setting savings goals. Join Empower for a live webinar that will address this important topic.

It will cover:

- Setting financial goals
- Creating a budget
- Making debt payoff a priority
- Building a safety net
- Setting savings goals

Live virtual sessions are available throughout the month. Sign up via the QR code or link below.



www.learningfromempower.com

Arch Support Meetings – Human Resources

Summer 2024 Meetings

Dates/times to be announced.



2024 Parish Mailing Dates

May 24

June 14

June 28

July 12

July 26

August 9

August 23

September 13

September 27

October 11

October 25

November 8

November 22

December 6



ARCH SUPPORT ON THE WEB

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