

ARCH SUPPORT

Issue 83

March, 2009

From the Chancellor's Desk . . .



Almost every day one of our colleagues or a local parishioner asks me about the finances of the Archdiocese. This is a good indicator that lots of people are concerned about how the present national economic challenges may be impacting us. I recently wrote to all agency personnel to provide information on our finances, and while the letter is too long for this newsletter, here are some of the major points.

The quality and the quantity of service provided by parish and archdiocesan staff is a testament to the commitment of our colleagues to the mission of the Church. Due to excellent stewardship of our resources, agency budgets are coming in under budget due to careful attention to both income and expenses. However, we are faced with challenges with our archdiocesan finances beyond your control. It is important to understand that we are not in a crisis, but we are attempting to take some prudent steps to prevent one.

Archdiocesan agency operations are primarily funded by three sources of income: parish assessments, income from our investment portfolio, and our annual appeal. At this time, we only have access to one real source of income, parish assessments. Our investment portfolio is not producing income, and the annual Catholic Services Appeal has been folded into the Building a Future of Hope Bicentennial Campaign. With good planning, we anticipated the reduction of income in both of these areas and budgeted accordingly, so this year's budget is going according to plan for the most part.

- We have had some increased and unexpected expenses in the area of energy (a very cold winter!), as well as insurance, facility repairs and program costs.
- Parish income is generally flat. Some parishes have been reporting decreases in annual offertory, while others are reporting flat or increasing income. Like the Archdiocese, a number of parishes are also facing some increasing and unexpected expenses. However, a very positive sign is that 98% of parishes are current with the payment of their parish assessments.
- Our investment portfolio has been significantly impacted by stock market declines. However, we still retain these stocks and when the market improves, we expect to regain at least some value of these investments. However, the short-term outlook is not very encouraging, and we will certainly feel these losses as we plan the budget for next year.
- The Building a Future of Hope Bicentennial campaign is doing well. The first seven parishes are at 90% of goal having already raised \$4.6 million out of a benchmark goal of \$5.1, and the campaign is ongoing. Even more than new dollars for our parishes and archdiocesan needs, we are excited to hear early reports of growing parish vitality as parishioners work together and pray together.
- This campaign will provide a source of funds for critical needs in our parishes and Archdiocese: parish priorities; assistance for struggling parishes; seminarian education; priest retirement; multicultural ministries; and tuition assistance. As these funds come in, we believe we will slowly return to a more stable financial position.

In all things, we rely on the care of our loving God. Let us together pray for one another, for the work we do, and for those most in need during this difficult time.

Summer Hours

Once again, Archdiocesan agency office hours will be adjusted for an eleven-week period this summer. Effective Monday, June 1 and continuing through Friday, August 14, 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.



REMINDER FROM THE FINANCE OFFICE

Proceeds from Special Collections are to be forwarded to the Chancery Office within 30 days after the collection. The following schedule shows the March and April collections. See the financial policies and procedures manual, pages 63 and 64 for further instructions. You can view the manual on our website at www.archlou.org.

NAME OF COLLECTION	COLLECTION DATE	DUE AT CHANCERY
BLACK AND INDIAN MISSIONS	MARCH 1, 2009	APRIL 1, 2009
CATHOLIC RELIEF SERVICES	MARCH 22, 2009	APRIL 22, 2009
RICE BOWL (HOLY THURSDAY)	APRIL 9, 2009	MAY 9, 2009
HOLY LAND (GOOD FRIDAY)	APRIL 10, 2009	MAY 10, 2009
CATHOLIC EDUCATION FOUNDATION (EASTER)	APRIL 12, 2009	MAY 12, 2009

COBRA

2009 brought changes in our COBRA notification process. Please keep the COBRA information sheet that is enclosed for quick reference to ensure you follow the new procedures when processing paperwork for a new hire or when an employee is terminating.

PAYCOR REMINDERS

While you can work in the Paycor system at any time entering information or getting payroll ready, **payroll can only be transmitted between 8:00 am – 3:00 pm. No exceptions.** This applies to any day that you might transmit. If you violate this condition, it creates problems for all our divisions. Set up your schedule to ensure that you are not trying to gather information and making payroll changes on the same day you need to process. Best practices call for you to make changes and review these changes prior to the day you are set to process. Remember, you can get payroll ready to go, but only press that process button between 8:00 am – 3:00 pm.

Follow the support call list that has been distributed to all locations. Our first-line, on-site support person is Jennifer Musick and she should always be your first point of contact. If Jennifer is not available and you can't wait for a return call, the secondary consultant is Mary Jo Westerkamp. To ensure you get timely support for assistance and questions, make sure you follow the above protocol.

RETIREMENT PLAN

A reminder to keep all employee personal information current and up to date in Paycor including termination dates. The accuracy of this information has an impact on the file pulled for the retirement plan.

Be sure you have identified employees that will be eligible for entry into the retirement plan on April 1, 2009 and that you have provided them with all the appropriate information.

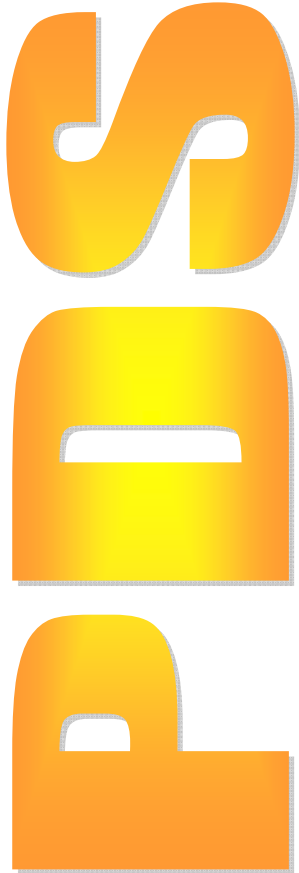
RETIREMENT PLAN LIMITS FOR 2009

401k Salary Deferrals	\$	16,500
Catch Up Contribution	\$	5,500

Paycor payroll system incorporates the new retirement plan limits automatically to monitor limits.



PDS Summer Workshop



At this time, we have only received responses for the following number interested in PDS Summer Workshop training:

Two-Day Church Office	8
One-Day Ledger	8
One-Day Facility Scheduler	7
One-Day Report Session	10

If you have failed to indicate interest in this training, e-mail Mary Ann Hood at mhood@archlou.org Full classes are needed in order for there to be a reasonable fee for each session. Please respond by March 31st if you are interested.

Bits & Pieces on DioView Transmissions

If you have had any problems with your DioView transmission of financial data, please review the following: before sending your reports through DioView, run a “Fix Data” to be sure there are no unresolved errors with the information being uploaded. Paul Goldsworthy, with PDS, recommends that before transmitting, check for program updates. If you try to send your data through a program that is not current, the DioView has a problem with compatibility. Should you have any questions or problems concerning your transmission, call or e-mail Mary Ann Hood at the Chancery Finance Office, 502/585-3291 or mhood@archlou.org

SEXUAL ABUSE POLICY AND PROCEDURES

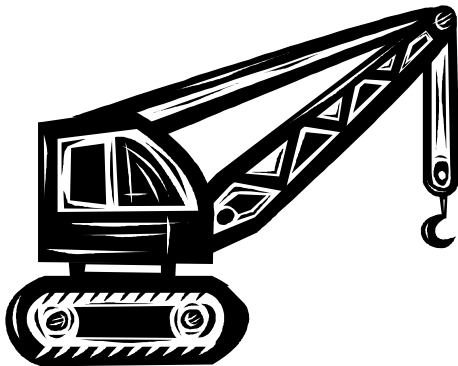
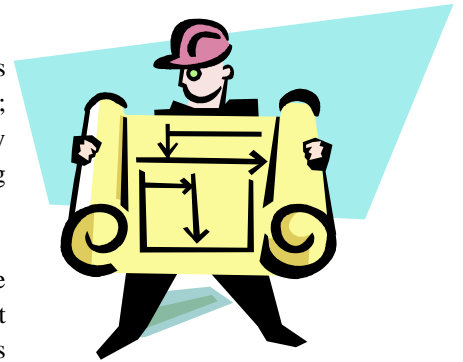
As referenced recently in a workshop conducted by Dr. Brian Reynolds, the primary purpose and goal of the policies put into place regarding Safe Environment Training and Criminal Background Checks are to provide safe settings for our children. Enclosed with this newsletter are two forms that you may wish to utilize in order to assist you in maintaining compliance with the USCCB Charter for the Protection of Children and Young People.

All employees and volunteers who work with children/youth must undergo a criminal background check. The form titled “Employee/Volunteer Criminal Background Check Authorization” may be used by you to gather necessary information to conduct a criminal background check. The form titled “Volunteer Information Record” can serve as a means to gather additional information to be kept on file for those who volunteer on a regular basis at your location. This information is important to have especially if an accident occurs and you need to contact a family member of the individual volunteering.

Construction and Renovation Projects

It feels like Spring is just around the corner, the signs are quite evident. It's not the buds starting to pop out on the trees or the daffodils and crocus beginning to jump out of the soil; it's not the increase of the daytime temperatures or the longer daylight hours; it's the many Archdiocese of Louisville parish and school requests for capital expenditures for the upcoming fiscal year. Hope SPRINGS eternal in the improvement of our facilities.

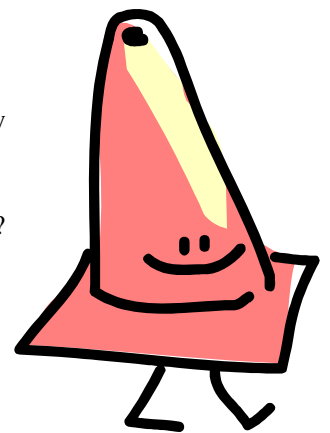
Every year about this time, there is an increase in requests for capital expenditures from the parishes and schools around the Archdiocese. This year is no exception, even with the current state of the economy. The "Building A Future Of Hope Campaign" is adding its own stimulus package to our local economy.



With this increase in activity, a review of the Renovations and New Construction Policy would be in good order. As well, there are some new changes to the policy that went in to effect back in July 2008. The full Renovations and New Construction Policy can be found on pages 55 thru 58 of the July 2008 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 "THE ARCHDIOCESE", go to and click on "Policies"; it will take you to the Financial Policies and Procedures Manual page. Then click on "July 2008 Financial Policies and Procedures Manual".

FAQs from the Parishes and Schools

- Q.** What dollar amount requires approval from the Archbishop?
A. Any project in excess of one month's normal income or \$10,000, whichever is less.
Ex: If your income in a normal month is \$6,000; than your threshold for approval is \$6,000. Conversely, if your income in a normal month is \$16,000; than your threshold is \$10,000.
- 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 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 your 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 sometime causes multiple inquires 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 the Maloney Center, 502-636-0296 x1227.

FOOD SERVICE NEWS

National School Lunch Program Honor Roll

St. Catherine	94%
St. Augustine	93%
St. Dominic	92%
St. Nicholas	89%
Notre Dame	88%
Holy Family	85%
St. Edward	84%
St. Athanasius	81%
St. Joseph	81%
St. Stephen Martyr	80%
Holy Spirit	79%
St. Aloysius Shepherdsville	79%
St. Gabriel	79%
St. Mary Oldham Campus	78%
St. Andrew	78%
St. James E-town	77%

Mark Your Calendar for 2009

March	American Red Cross Month
March 11	Cafeteria Managers Meeting at the Chancery 2:30 pm
March 12	Cafeteria Managers Meeting at St. Gregory 2:30 pm
April	National Poetry Month
April 22	Earth Day
May	National Smile Month
May 5	National Teachers Day
May 13	Cafeteria Managers Meeting at the Chancery 2:30 pm
May 14	Cafeteria Managers Meeting at St. James Elizabethtown 2:30 pm
June	Student Safety Month
June 15-17	Kentucky School Nutrition Association Conference (Galt House)
June 29- July 2	School Nutrition Association Annual National Conference
July 30	Cafeteria Managers Meeting at St. Joseph Bardstown 2:30 pm
August 6	Cafeteria Managers Meeting at Chancery 2:30 pm

Retirement - If any managers are retiring at the end of the current school year, please notify Juanita Bisig at 502-585-3291, ext. 1123 or jbisig@archlou.org

CRE Review - The State has completed their CRE review of the Archdiocese food service program. We are pleased to announce that there were no critical findings.

Cafeteria Budget packs have gone out and are to be completed and returned to the Central Food Service Office by April 3, 2009.

NO BAKE BLUEBERRY SQUARES

16 servings

INGREDIENTS

- 1 1/2 cups graham cracker crumbs
- 3 tablespoons white sugar
- 1/2 cup butter or margarine, melted
- 1 (8 ounce) package cream cheese, softened
- 1 cup white sugar
- 1/4 teaspoon salt
- 2 teaspoons vanilla extract
- 1/2 teaspoon lemon juice
- 1 (8 ounce) tub frozen whipped topping, thawed
- 3 cups frozen blueberries

DIRECTIONS:

In a medium bowl, stir together the graham cracker crumbs and 3 tablespoons of sugar. Mix in the melted butter. Sprinkle evenly into the bottom of a 9 inch square baking dish, and pack down into a solid crust.

In a large bowl, beat cream cheese with 1 cup of sugar until smooth. Stir in salt and lemon juice. Fold in the whipped topping until well blended, and then fold in the frozen blueberries. Spoon over the crust in the baking dish, and spread evenly. Cover with plastic wrap and refrigerate for at least 1 hour before slicing into squares and serving.

The following schools have excess product, if you would like to have it please call.

Our Lady of Lourdes- Mary Spanyer 502-893-3628- 4 cases ham, 5 cases ground beef, 3 cases salsa, 4 cases diced tomatoes

Notre Dame Academy- Janie McNeill- 502-448-7556- 3 cases salsa

St. Agnes- Pam Amon- 502-458-2850- 10 cases salsa

St. Albert- Sharon Grider- 502-425-6739- 6 cases tomatoes, 4 cases salsa, 5 cases tomato paste

Holy Spirit- Lisa Hulsman- 502-893-7700- 2 cases diced tomatoes, 3 cases tomato paste, 4 cases applesauce, 3 cases mixed fruit

St. Mary Academy Jefferson Campus- Angela Perry- 502-425-1949- 1 case diced chicken, 1 case turkey roast, 5 cases tomato paste, 5 cases ground beef, 4 cases apple sauce, 5 cases diced tomatoes

St. Mary Academy Oldham Campus- Sue Fuller- 502-222-0671- 10 cases green beans, 6 cases mixed fruit, 10 cases corn, 5 cases peas, 2 cases pears, 10 cases applesauce, 4 cases orange juice



As we complete the journey of the Lenten desert, may the blessings of the new light and refreshing waters be yours during the Easter season.

April 2009 Arch Support Meetings

Tuesday, April 14, 2009

10:00 am

Chancery Office

Thursday, April 16, 2009

10:00 am

St. Joseph Parish Office – Bardstown

All Business Managers and Bookkeepers are encouraged to attend.

High School Business Mangers Roundtable

Tuesday, March 24, 2009

Noon

Hosted by: Linda Harris

Assumption High School

RSVP: Linda.Harris@ahsrockets.org

ABC WORKSHOP

Mark your calendar now! Personnel from the state ABC Office will conduct the annual ABC training session on Tuesday, March 31st, 7:00 pm at Holy Family Parish, Saffin Center, 3926 Poplar Level Road. Please encourage volunteers to attend this training session if they will be responsible for serving alcohol during parish events. Please call the Chancery Office at 502-585-3291 or e-mail Norma at nmerrick@archlou.org and let us know how many from your parish will attend so that we may plan seating and materials accordingly.

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 the “The Archdiocese,” click on “Publications,” click on **ARCH SUPPORT**.