



Parishes And Curia Together

Parish Support Newsletter

VOLUME 3, ISSUE 4

April 2018

April To-Do List

- Continue work on FY19 budgets
- Submit 3rd quarter 941 for review and approval
- RSVP to Yearend Meeting invitation

Schedules: Updates, Training and Meetings

- 4/8 & 4/29: QB updates—no access to files from 7pm-8pm
- Fiscal Yearend meetings (all times are 9-noon)
 - May 29-CRC
 - May 30-All Saints-St. Peter's
 - May 31-Our Lady of Lourdes-Washington
 - June 12-St. Sabina
 - June 13-St. Agnes
 - June 21-CRC

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Great Opportunity - Grant Funding for Sacred Places



From prairie churches to urban cathedrals and synagogues, historic sacred places are often the oldest, and most beautiful, buildings within our communities. [Grants from the National Fund for Sacred Places](#) help to keep these places as an important part of our national cultural heritage.

The Fund for Sacred Places is a comprehensive program that provides training, planning grants, and capital grants from \$50,000 to \$250,000 to congregations of all faiths for rehabilitation work on their historic facilities.

In the face of changing demographics and inadequate resources now is the time to support these structures that have played a critical role in shaping the character of our communities.

Congregations are urged to **submit their letter of intent by April 17** for the Fund for Sacred Places for projects such as:

- Urgent repair needs that are integral to life safety.
- Projects that improve the usability or ADA accessibility of the property.
- Renovation projects for important community outreach.

Visit www.fundforsacredplaces.org for more details, including eligibility requirements, guidelines, and online application. Missouri is actually mentioned as one state that they would like to receive applications from, as they don't appear to have made a grant in this area yet. It looks like the program ends after 2019, so I would think our Church would have an immediate leg up.

Fiscal Yearend Meetings

Can you believe we're closing in on the end of FY 2018 and preparing for FY 2019? As is our practice, we invite all secretaries, bookkeepers and business managers to attend a Fiscal Yearend Meeting. We are again taking the 'show on the road' for the four of the six meetings. Dates, locations and times are on the left margin of this page in the Training/Meeting Schedule.

If you choose not to attend because "it's always the same old information", we urge you to reconsider and attend

this year. Curia members from Communications, Archives, HR, and others will be present to inform you of their services and answer your questions.

There is always information given at the meetings that does not appear in handouts so please plan on attending.

We'll be sending out invitations in mid-April with specific details. So be on the lookout and be sure to RSVP!



“Education is not a tool for development - individual, community and the nation. It is the foundation for our future. It is empowerment to make choices and emboldens the youth to chase their dreams.

- Nita Ambani

MOST 529



As a follow-up to last month's article which included information and clarification regarding the MOST 529 program, we have completed the procedure and worksheet for schools and parishes for the Spring 2018 semester. It is important that ALL schools use the same calculations and worksheet to inform parents of tuition costs.

The worksheet is created so only the name of the school and tuition rates need be entered. Formulas in the worksheet determine the cost per child per semester while it is the parent's responsibility to manually enter credits (discounts, scholarships, grants, etc.) to complete the form.

[Click here](#) to download the MOST 629—Spring 2018 Staff Instructions and the MOST 529 Tuition Worksheet—Spring 2018. The documentation and accompanying worksheet is for the **Spring 2018 semester ONLY**. Documents for school year 2018-2019 (and future years) are scheduled to be released in June.

PSR Payroll Reminder

Most parishes pay their PSR catechists twice a year—once in December and again at the end of the school year in May. Due to the infrequency of the PSR payroll and the fact that catechists can change during the year, it's advisable to start now to verify that all required paperwork for each employee is in good order. Reviewing the catechist list to current payroll will save time and aggravation when it's time to run their May payroll.

For parishes using Lawson payroll, be sure to notify payroll of all additions, changes and deletions to the list.

Working ahead now will eliminate last minute headaches!

Registering New Parishioners

There are quite a few parishes working diligently to 'clean-up' their census and Servant Keeper files. As a result, we're asked if there is a 'standard' Parish Registration form.

Servant Keeper 8 offers a very good Registration/Profile report/form. In the Membership module, under Reports, select All Family Records. Select 'Profile Reports' in the Report list then select the 'Family' button in the 'Print report by' window. After making those selections, you may

then chose 'Gathering Sheet (Blank)' and preview a blank form that you may use 'as is' or export as a Word document that can be customized to fit parish needs.

Parishes wishing to update current family and individual information may use "Gathering Sheet' or Profile Report' which contains the family information currently in SK.

The 'Profile Report' is also available when 'Individual' is selected in the 'Print report by' window.

Just a few more tools to help keep Servant Keeper files up-to-date and accurate.!



Recording Sacraments



Did you know that help with recording sacraments is just two clicks away in Parish Helper OnLine (PHOL)? Simply select Sacramental Records Handbook found under the Help menu. This manual includes definitions, instructions and examples of how to record sacraments in the official parish registers and PHOL.

Did you know that annulments are entered in the records of the annulled marriage and not the subsequent marriage? Questions concerning annulments can be answered by opening the handbook, entering CTRL F and entering 'annulment' in the search box.

Do you know that the maiden name or baptismal surname should always be used when recording a woman's sacraments? Simply search 'maiden name' in the handbook.

What about "how do I record this funeral?" Again, just

search for funeral in the handbook.

The handbook is updated and edited when needed. It is searchable when online but also may be printed for your convenience.

You may have a sacramental situation that is not addressed in the handbook. In that case, don't hesitate to email or call for help. Parish Support is happy to assist as is Archdiocesan Archives at 314.792.7020.

"I believe if you keep your faith, you keep your trust, you keep the right attitude, if you're grateful, you'll see God open up new doors."
- Joel Osteen

Parish Administrative Services

We are pleased to announce the opening of our new Parish Administrative Services office in St. Charles. The office opened on February 1st and will be used not only for Shared Accounting but also for "road Show" type training and meetings (when available).

Below is an update of the services provided by PAS.

Shared Accounting Services (SAS): 111 parishes strong in SAS now and hitting our busy season with budget prep for FY19 and helping school registrations as it relates to tuition billing. Contact Jerry Amsler for more information: 314.792.7111 or [email Jerry](#).

Parish Support: Work continues on: 941 reviews, Prudential remittance reporting; HRIS project; MOST 529 procedures; and Communications. Contact Sally Serbus for all Parish Support needs: 314.792.7716 or [email Sally](#).

Strategic Planning: Just a note to remind parishes that the planning services offered through the office of parish support are just that – a SERVICE! While we certainly need pastors and parish leadership willing to reflect upon how their parish might do things more effectively – planning does not have to be an overwhelming year long process! Our office can work with members of the parish leadership to see how planning can be incorporated into your current leadership structure. The process is completely customizable to meet parish needs. If you sometimes think the ministries of your parish

leave the pastor and staff going in all different directions – planning could be the right next step! Contact Amie Koenen for more information: 314.792.7072 or [email Amie](#).

Education: Twenty-five (25) of our amazing priests have completed the Finance Module portion of the Pastoral Institute of Leadership school. We continue to make progress on the HR module as well as Managing a School Site Module. The concept will be presented to a National audience in September at the Diocese Financial Management Conference (DFMC) and the Archdiocese of Los Angeles has also reached to learn more about our educational program. More classes to be launched shortly...stay tuned. Contact Jerry Amsler for more information: 314.792.7111 or [email Jerry](#).

Project Management: Total estimated savings so far across the parishes has been **\$73,182**. The projects range from waste hauling, energy efficiency lighting, snow removal contracts to name a few. Part of this initiative also includes the Small Loan Program which has given out \$100+k in loans to help parishes with misc. projects. Contact Jerry Amsler for more information: 314.792.7111 or [email Jerry](#).

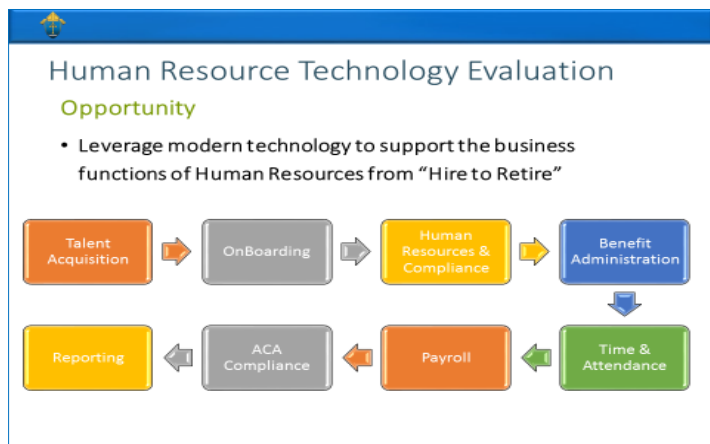
HRIS Project Update

In the February issue of PACT, we informed you that back in November, 2017, the Mission Support Team at the Cardinal Rigali Center initiated a project to evaluate technology needs associated with “hire to retire” processes at all of the various employment locations within the Archdiocese. We want to provide an update on the project.

A Steering Committee was organized to provide guidance and decision making throughout the project:

Msgr. Dennis Stehly—Vicar General, Moderator of the Curia	Msgr. Henry Breier—Pastor, Queen of All Saints
Jerry Amsler - Director, Parish Services	Marilisa Heiderscheid - Controller
Cheryl Flaherty—Executive Director, Human Resources	Paul Giljum - Director, IT
Sr. Nathalie Meyer—Interim Director, Catholic Education	Mark Vogt—CFO, Catholic Charities

The technology we use today is 20 years old. The below slide indicates the areas of opportunity that can be expected with more modern technology:



We also anticipate that there will be other opportunities available in the evaluation:

- Increased efficiencies across the entire employment-related spectrum
- Even more fully secure local HR data and compliance adherence made much easier to achieve
- Better support for local and Archdiocesan-wide decision-making
- Enhances employee engagement and satisfaction – both those who are performing these activities today but also those who are on the receiving end of them

The challenges we face include the complexity of the organizational structure of the Archdiocese and the tools we are utilizing to manage within that complexity. We use multiple systems including Lawson and QuickBooks for payroll and all benefit plan participants are entered into Lawson for benefits administration. None of these systems are integrated, so they don’t talk to each other.

From December to end of January, we conducted 30 onsite Discovery interviews at 28 separate locations including: Curia, Catholic Education office, including high schools and elementary schools, Catholic Charities Agencies, parishes, cemeteries and Kenrick-Glennon Seminary. The end result was 700 different data points across the employment spectrum. Analysis of these data points indicated 75% of this work is manual and paper based. Modern technology platforms automate all of this work.

The discovery process confirmed there is no sustainable platform in place for the future. Currently, you have very little access to information at the local level, with extremely limited visibility to information at the Archdiocesan level making it more difficult to make good decisions. Additionally, our data is not in real time. By the time it is compiled, the data has changed.

There are many benefits in moving to a common platform for HR/Payroll and Benefits Administration:

Employees: easier access to real-time data for all of your own information – pay statements, vacation and sick time accruals, benefit information, etc. The solutions are all Cloud-based so you will be able to access the information from a desktop portal or a phone app.

Managers of people: easy and immediate access to real-time information for each of your staff members – position titles, job descriptions, performance reviews, compensation, etc. also through the same portal and application. Additionally, there will be automated workflows built into the system to help make life a little easier for you – requests for time off will come to you automatically, timesheets requiring approval will come to you automatically, etc.

Business Managers: it will automate the new hire process and benefit administration, provide time and attendance tracking and provide accessibility to robust reporting capabilities.

Finally, as **an employer**, we will be providing a much-enhanced 1st impression to people who are interested in working for your parish as it will offer an automated, efficient application and onboarding process.

We will be working through the request for proposal (RFP) process and expect to have a go/no go decision by end of May. If the decision is to purchase new technology, we are expecting to kick this off sometime late summer.

If you have any questions about the project, please refer them to our HRIS Project Manager, Cheryl Johnson @314-792-7423 or cheryljohnson@archstl.org

From the Curia—SLAF

Non-Endowments

The SLAF Board of Trustees has recently lowered the minimum deposit requirement for non-endowed accounts from \$500,000 to \$100,000 provided that other conditions are met. These conditions are listed below.

- Maintain at least three months of operating expenses on reserve with the SLAF,
- Remain current on all financial obligations which include amounts owed to the Archdiocese,
- Report net income on the Statement of Activities, and
- Agree in writing to retain deposits for a minimum of 12 months with no withdrawal of principal.



Interest Rates

Beginning July 1, 2018, interest rates on depositor fund accounts and loans will increase by 0.25%. Thus, construction loan rates will increase from 3.50% to 3.75% (3.50% if direct debit) and equipment loans from 3.00% to 3.25% (3.00% if direct debit). Please adjust budgets accordingly.

Contact LaWanda Barnes, Finance Manager, at 314-792-7129 with any questions on changes in non-endowed accounts and interest rates.

Lawson Payroll Update

We welcome St. Cletus, Sacred Heart—Crystal City, and Good Shepherd—Hillsboro to Lawson payroll this month. Currently 97 parishes/schools are enjoying the benefits of using Lawson Payroll. With the total cost to parishes only \$1.25 per paycheck, What's not to like? No more worries about missing tax and remittance deadlines are just two benefits.

To discuss Lawson payroll and specific information regarding the conversion process for your parish or school, please contact Darlene Doerr at 314.792.7117 or Barb Sandell at 314.792.7082.

Parish Support Contact Information

Cardinal Rigali Center
20 Archbishop May Drive
St. Louis, MO 63119
Fax: 314.792.7149

Sally Serbus - Parish Support Manager
Phone: 314.792.7716
Email: SallySerbus@archstl.org

Donna Bosch - Parish Support
Representative
Phone: 314.792.7109
Email: DonnaBosch@archstl.org

Jerry Amsler—Director
Parish Administrative Services
Phone: 314.792.7111
JerryAmsler@archstl.org

Parish Support exists to serve both parishes and Curia. We serve St. Louis pastors, parish staff, Curia members, volunteers, USCCB and parishes outside of the archdiocese. It is our mission to provide training and support. We either have the answer, will get the answer, or refer you to someone who can help.

We are here to serve.

[Click here](#) for immediate access to back issues of PACT—including a comprehensive Index for all issues.

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Web Page](#)