ADMINISTRATIVE SERVICES QUARTERLY

ASQ is a quarterly publication for all diocesan and parish finance council members. Published by the Diocese of Shreveport.

THE CATHOLIC CENTER
3500 Fairfield Avenue
Shreveport, LA 71104
PHONE: 318-868-4441
FAX: 318-868-4605
WEB: www.dioshpt.org

THE MINISTRY OF ADMINISTRATION

EDITOR: SHERRY SWANEY HEFLIN
CONTRIBUTING WRITERS INCLUDE:
JILL BRANIFF
Director of Business Affairs
jbraniff@dioshpt.org
KATIE SMITH
Director of Stewardship and Development
ksmith@dioshpt.org
DEBRA SCHMIDTKE
Director of Human Resources
dschmidtke@dioshpt.org

May 2005

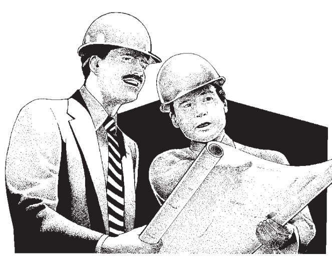


# From the Business Side with our Diocesan Business Officer

## Jill Braniff

### *Building construction/ renovation procedures*

The following procedures should be consistently followed before, during and after any parish building construction/renovation (improvement) projects to ensure compliance with the Diocesan Policy on Construction/Improvements:



***PRELIMINARY REQUEST*** – A Preliminary Request Form must be completed and submitted to the Bishop prior to retaining the services of an architect or contractor. The Preliminary Request Form can be obtained from the Chancellor's office and will soon be posted on our website in read-only format.

The Preliminary Request Form requires that the following information be submitted:

- A description of the construction/renovation
- The approximate cost of the project
- Cash on hand from the parish available for the project
- Proposed financing, i.e. estimated rate of interest and term
- Most recent Spiritual Report, if not on file in the Chancery
- Copy of current quarterly financial report, if not on file in the Business Office

**NOTE: THE PARISH MUST SUBMIT THE COMPLETED PRELIMINARY REQUEST FORM TO THE CHANCERY 30 DAYS PRIOR TO ANY PRELIMINARY ACTION.**

***FINAL REQUEST FOR APPROVAL*** – When the Bishop returns the Preliminary Request Form, the parish is then authorized to engage an architect and receive bids for the project. Having done this, a Final Request for Approval Form must be completed and submitted to the Bishop. Again, the Final Request for Approval Form can be obtained from the Chancellor's office and will soon be posted on our website in read-only format.

The Final Request for Approval Form requires that the following information be submitted:

- A complete and final description of the construction/renovation
- The total final cost of the project
- A copy of the approved bid
- Name of the contractor, architect and lender if borrowing required

ASQ

# Business Side

- A copy of the contractor's bond certificate and current insurance (required minimum coverage per incident is $1,000,000)
- Cash on hand from the parish available for the project (***one-half*** *of project cost must be on-hand)*
- If borrowing required, the name of the lending institution and final terms of the note must be reported (i.e. rate of interest, term of loan, and payment per month/quarterly (principal and interest). **A copy of the financing instrument must be attached to the form.**
- The form must include the signature of the pastor, trustees, and President and Secretary of the Parish Finance Council
- A separate corporate resolution approving the project must be attached to the form
- A copy of the construction drawing must also be provided to be kept on file in the Chancery

**NOTE: THE PARISH MUST SUBMIT THE COMPLETED FINAL REQUEST FOR APPROVAL FORM TO THE CHANCERY 30 DAYS PRIOR TO ANY DEFINITIVE ACTION.**

Please feel free to contact the Diocesan Business Office or the Chancellor's Office about any of the procedures noted above.

---

## *NEW!!! Insurance Reporting Change*

Effective July 1, 2005, all property, liability or auto insurance claims must be reported directly to the Diocesan Business Office. Please contact Lori Mainiero in the Business Office at (318) 219-7270. Lori will complete the claims form and electronically forward it to Gallagher Bassett Services, Inc. (copy to reporting parish). Please provide Lori with a valid e-mail address to receive your copy of the completed claims form.

## *NEW!!! Form for Requesting Freeze of Annual Parish Assessment*

Effective immediately, parishes seeking a freeze of the annual assessment must formally submit their request using the new Form for Requesting Freeze of Annual Parish Assessment. Once all requested information is complete and submitted to the Bishop, the Diocesan Corporate Board will review the request at its subsequent meeting. The form will be further documented with details from the Chancery and the Business Office, and then returned to the parish as a formal response. Please note that there is no longer the option to request exemption only on special projects and collections which are taxable. Rather, parishes seeking assessment exemptions of any kind will be requested to apply for a freeze of the annual parish assessment.

## *Nurturing Stewardship in your Parishioners*

Stewardship is a concept that should be very easily grasped by anyone who is familiar with the scriptures. The notion of giving of ourselves to further the Kingdom of God on earth are heavy within the Gospels. Most all Catholics would concede that they are well aware of what they should be doing as stewards…sharing of their time, talent and treasure and giving back to God for that which they have been blessed. It is generally the case, however, in both the parish setting and in the diocese that about 30% of the families do 100% of the stewardship.

It has been my experience that stewardship grows deep roots in an environment that is rich in community. When a parishioner feels a part of the community of faith, his or her desire to commit time and talent to the work of the church grows. So how do we maintain a sense of community despite being pulled in so many different directions? The answer lies in forging personal relationships. What a difference we would see if we could increase the number of stewards in our church to even 50%! Not only would our parishes run smoothly, but we would benefit financially from increases in the treasure portion of stewardship. When people feel connected to their parish, and feel a strong sense of community, they tend to be more generous with their monetary blessings. They have a personal investment in the functioning of the parish, and that will be reflected in their greater concern about the financial aspects as well. Also, if you are directly involved in parish life, you are much less likely to feel anonymous, as if your gifts don't count or won't be noticed.

**Tips for Nurturing Stewardship**

- Get to know new parishioners and determine where their talents lie.
- Extend invitations to parishioners, old and new, to participate in ministry. Don't leave it completely up to them to break the ice. They may never step forward.
- Rely on different families to perform routine church tasks. Ask someone who has never done the task before!
- Form a stewardship committee, whose responsibilities include reaching out to get to know each parishioner personally.
- Involve the youth of your parish in ministry, so they grow to be good stewards.

While a very few of us are real go-getters and self-starters, the majority of people are rather shy in a new situation. Joining a new church can be a very intimidating process, as can joining a committee or group where the member doesn't know many people. A simple invitation can go a long way. Is there someone at your worship location who meets with new parishioners and gets to know them a bit? A fifteen-minute conversation can uncover just how the Lord has blessed the new members, and give you a good starting place for the invitation. For example, if during your first meeting with a new parishioner, you find that the wife works as a teacher, you might extend an invitation to volunteer in the nursery. Hand her the schedule and introduce her to the person in charge of the nursery. The hard part is taken care of, and it makes it easy to say "yes!"

Another good idea is to ask new parishioners what ministries they served in their previous parish. If they were lectors, ushers, or Eucharistic ministers, you can make them feel instantly connected and at home by putting them in contact with the person in charge of these teams.

You can handle the incoming families this way, but what about the families who have been a part of the parish for years, and only participate in Mass? How should they be approached so that they feel welcome and needed in the ministry of the church? The answer, once again, is personal contact. I am a firm believer that many people are more than willing to be good stewards, but lack the motivation or courage to pursue ministry on their own. Basically, they are willing, but they are simply waiting to be asked. Even something as simple as making sure the offertory is brought up by a different family each week can be a source of pride and connection to the parish for a family. Even those parishioners who have never done more than attend mass regularly could benefit from being asked to assist in small tasks at the church. It is sometimes easier to let that handful of self-motivated parishioners do the lion's share of the work. They are experienced, they know what to do without much instruction, and they are reliable. But relying on the same people for many of the tasks can alienate others, making them feel that the ones taking the leadership role again and again have a monopoly on that particular ministry. Try extending an invitation to a different family…changing the drape on the crucifix after Easter…gathering the towels and filling the basins with water for the foot washing during lent, or laundering and ironing the altar linens. The key is to draw up a list of small tasks that need to be done, and making a special effort to ask those who don't typically volunteer to help out.

Yes, it takes time to develop these personal relationships with your parishioners, and not every person will respond. But the dividend it pays in the sense of community among your parishioners makes the effort very worthwhile, not to mention the fact that your parishioners will be personally blessed by their journey into stewardship, and their spiritual lives will begin to bear more fruit! It is not only a gift to the parish to have more and better Christian Stewards, it's a gift to the individuals as well, as they feel the power and blessings of being Christ's hands on earth.

**Katie H. Smith**
*Director of Stewardship and Diocesan Development*

Human Resources

## Reporting Injuries

Beginning July 1, 2005 all reports of volunteer or employee injury should be sent to the Diocesan Office of Human Resources rather than directly to the insurance carrier. Any location that wants to start sending their reports to us now is welcome to do that. We hope to relieve the locations of some of the burden of providing the required FMLA and health insurance continuation notices and coordinating information with the insurance carrier. This will also help us better track the types of injuries we are experiencing throughout the diocese as well as help us insure that we are getting the appropriate handling of these claims from our insurance company.

Worker's compensation laws are among the oldest and most highly developed of all employment laws. By 1949, all 50 states had implemented them and most states administer their individual laws similarly. One area that may come as a surprise to many managers is that they are required to provide worker's compensation coverage to volunteers as well as all employees no matter how many hours they work. Probably the biggest frustration for managers when dealing with workers compensation is that it is similar to no-fault insurance. Basically, it doesn't matter if an employee did something incorrectly resulting in an injury; the Diocese location involved is still liable for the claim. There are certain circumstances that can result in a volunteer or an employee being found ineligible for worker's compensation. A claim can be denied by the insurer if it can be shown that he or she:

- intentionally injured himself or herself or was injured while intentionally injuring another employee.
- was intoxicated at the time of the injury, or
- deliberately failed to use adequate guard or protection against the accident.

Please keep in mind that to disallow a claim involves a comprehensive program that involves medical evaluation, safety training and effective communication of policies. The Office of Human Resources plans to offer a workshop to all locations prior to the end of June that will provide tips on how to effectively manage injury reporting and investigation for your locations. If we can answer any questions in the meantime, please call our office at 868-4441.

**Debbie Schmidtke**
*Director of Human Resources*

---

## Safety Topic - Ergonomics

Reducing work-related muscoskeletal disorders

The goal of ergonomics and related programs is to reduce work-related muscoskeletal disorders by adapting the work to fit the person rather than the other way around. There are many aspects to managing this concept. For office work, one area that warrants consideration is proper seating. Seat-height adjustability and lower back support are important for work done while spending a long time in a seated position. Ideally, chairs or seating should:

- Adequately support back and legs.
- Have padded seats.
- Have separately adjustable back and seat cushions.
- Permit feet to be supported either on the floor or with a footrest.
- Be easily adjustable while seated.
- Have swivel seats for most tasks.