

D-4(a)

Subsidy by Parishes Without Schools
(04/13/00)
(Department of Catholic Schools)



THE ARCHDIOCESE OF SAN FRANCISCO
OFFICE OF THE ARCHBISHOP

445 CHURCH STREET, SAN FRANCISCO, CA 94114-1799 (415) 565-3600

Memorandum

TO: Sister Glenn Anne McPhee, OP ✓
Reverend Harry Schlitt

FROM: Reverend Thomas S. Merson *Tom: Lmh*

DATE: May 12, 2000

RE: Council of Priests' resolution CR 99-00.2
Subsidy by Parishes without Schools

Archbishop Levada has asked that you receive copies of this resolution for your records.

Thank you.

cc: Mary Ellen Hoffman

St. Matthew Catholic School
910 South El Camino Real
San Mateo, CA 94402

SAMPLE

Letter Of Recommendation From Parish

(Bring this form to your parish office)

NAME OF PARENT: _____

ADDRESS: _____

NAME OF STUDENT: _____

NAME OF PARISH: _____

(This Part to be completed by Pastor or Parish Representative)

DATE REGISTERED IN PARISH: _____

CONTRIBUTING: Yes _____ No _____

PARISH INVOLVEMENT:

COMMENTS: _____

COMPLETED BY: _____

DATE: _____



THE ARCHDIOCESE OF SAN FRANCISCO

ONE PETER YORKE WAY, SAN FRANCISCO, CA 94109-6602 (415) 614-5500 FAX (415) 614-5555

15 February 2001

MEMORANDUM

TO: Board of Education
FROM: Finance Committee
SUBJECT: Interparochial Support Policy Recommendations

In April, 2000, the Council of Priests adopted the following resolution:

"The Council of Priests recommends to the Archbishop and to the Archdiocesan Board of Education that the policy is that parishes without schools will subsidize their parish students, and that the home parish will be required to certify parishioner status prior to a lower tuition rate being granted by the school. The Archdiocesan Board of Education would also establish criteria for certification by parishes.

"The subsidy rate will be set by the Archdiocesan Board of Education based on the average of the difference between an in-parish and out-of-parish rate. The subsidy would be enforced even though the school does not have the distinction between in-parish and out-of-parish.

"The Archbishop will be in conversation with the Vicar of Administration and the Superintendent of Schools to work out a way to assist those parishes for whom this would be a burden.

"The families will be expected to fulfill other requirements of the school, such as scrip, service hours, etc.

"This policy would be effective beginning the school year 2001-02."

Since schools are now beginning the registration process for new students, it is urgent that the Board make the recommendations concerning criteria and subsidy amount called for by this resolution.

The Finance Committee has reviewed the previously formulated criteria for parishioner status. The Committee has also reviewed the department of Catholic Schools' analysis of the average difference between in-parish and out-of-parish and participating and non-participating tuition rates for 2000-01. are offered by the staff in the hope that the Board will act on this matter at the February 15 meeting.

The Finance Committee, therefore, recommends that the Boards adopt the following recommendations:
Recommendation #1

(1) For purposes of this policy, "parishioners" are those families who meet the following criteria:

- A. Proper registration in the parish; *and*
- B. Regular participation, as defined by the parish, in liturgical worship and in the life of the parish; *and*
- C. Regular contribution, as defined by the parish, to the support of the parish.

(2) The Pastor of a parish without a school who certifies in writing that a family meets the above criteria in his parish shall provide a subsidy equal to the average difference in all parish schools between in-parish and out-of-parish or participating and non-participating tuition rates in the prior school year. The parish without a school shall be responsible to pay these subsidies to the school(s) in which children of families certified as active parishioners are enrolled. For the 2001-02 school year, the subsidy shall be:

1 child	\$395
2 children (same school)	\$685 (family total)
3 children or more (same school)	\$815 (family total)

(3) This certification of active parishioner status and the accompanying subsidy obligation shall be renewed each year. The Department of Catholic Schools shall notify parish schools annually as to the amount of subsidy.

Attached is a sample of a form that schools may use for certification purposes. Such a form should be provided to all Catholic families at the time registration or re-registration. Families are not entitled to parish or participating tuition rates unless a completed certification form is on file.

Sister Glenn Anne McPhee, OP
Office of Catholic Schools
445 Church Street
San Francisco, California 94114

COUNCIL OF PRIESTS
ARCHDIOCESE OF SAN FRANCISCO

MINUTES OF SESSION XXXIII
Cathedral Conference Center
10:00AM
April 13, 2000

I. OPENING PRAYER: Reverend Peter Sammon

ROLL CALL

PRESENT: Archbishop William J. Levada, Bishop John C. Wester, Msgrs. Robert McElroy, James McKay, John O'Connor, Revs. William Brady, Leonard Calegari, Randolph Calvo, John Cloherty, Frederick Cwiekowski SS, Bernard Dabbene SDB, Thomas Daly, Richard Deitch, Bruce Dreier, Rene Gomez, Lawrence Goode, Kirby Hanson, William Justice, Piers Lahey, Floyd Lotito OFM, Michael Mahoney OFM Cap, Daniel McCotter CSP, Stephen Meriwether, Peter Sammon, Harry Schlitt, Eugene Tungol, Louis Vitale OFM, Milton Walsh, Warren Woods.

EXCUSED: Revs. Paul Bernadicou, SJ, William Flanagan.

GUEST: Mrs. Joanne Maher, Acting Director of Stewardship and Development

II. APPROVAL OF THE MINUTES: The Minutes of the March 9 meeting were approved as submitted.

III. TREASURER'S REPORT - The Treasurer's report was accepted as submitted.

IV. RESOLUTION: SUBSIDY BY PARISHES WITHOUT SCHOOL - Rev. Bruce Dreier

Fr. Dreier introduced the resolution which revises the present policy concerning the subsidy for students whose home parish does not have a school. The resolution is as follows: "The Council of Priests recommends to the Archbishop and to the Archdiocesan Board of Education the policy that parishes without schools will subsidize their students, and that the home parish will be required to certify parishioner status prior to a lower tuition rate being granted by the school. The subsidy rate will be set by the Archdiocesan Board of Education based on the average of the difference between an in-parish and out-of-parish rate. The families will be expected to fulfill other requirements of the school, such as scrip, service hours, etc. This policy will be effective beginning the school year 2001 -02." To clarify, the family would receive from the home parish the flat rate set by the diocese, which was \$350 last year, to apply toward the tuition.

Fr. Meriwether said, regarding the obligations of the school parents, he feels there must be some criteria or standard by which a family is judged to be eligible for admission to the neighboring school. He would have a problem providing \$350 for a family who has never been seen before in the parish. Fr. Dreier said his committee felt that each parish would set its

own criteria and if the family of the home parish does not meet that criteria for subsidy, then they must pay the higher rate of tuition. Fr. Deitch suggested that some overall objective set of standards be developed for the out-of-parish people. Msgr. O'Connor agreed and also said he is not clear as to who would initiate this policy, the family with their pastor or the school with the family's parish? Fr. Dreier answered that it is the family making the request. Fr. Calvo said he would like to make a friendly amendment to add to the resolution, "The subsidy would be enforced even though the school does not have the distinction between in-parish and out-of-parish." Some schools do not have in-parish and out-of-parish rates but there will be a common diocesan wide scale, regardless of the difference in school rates.

Fr. Mahoney said this policy is going to be very difficult to implement because a parish without a school may have thirty or forty students who want to go to the neighboring parish school and the home parish may resent having to pay such a large subsidy. Fr. Dreier answered that the issue was first considered in the Council of Priests a few years ago to address the fact that all parishes share the educational responsibility of the Church in the support of Catholic education, whether they have a school or not. The purpose was to respect the family's choice of parish, even if it does not have a school, and to be able to send their children to a neighboring parish school without being penalized. With this policy, the discretion is left to the pastor of the home parish to utilize the criteria that are set up. Fr. Calvo recommended there be some follow-up on the certification criteria in order to insure that the commitment in the activity of the parish continues to be honored by the parents. He proposed a friendly amendment that would address this issue: "The Archdiocesan Board of Education would also establish criteria for certification by parishes," and it was seconded.

Fr. Sammon suggested that a yearly review of the certification process be required. He feels the process of school acceptance is very subjective. For instance, a single parent in a very poor parish, with a couple of kids, working two jobs and unable to participate in the parish as much as he/she would like, has a hard time passing the required criteria for subsidy. This policy needs to allow for some individual consideration. Fr. McCotter asked if this policy were mandatory for all parishes, regardless of their economic situation, because there are some parishes in the Archdiocese that will not be able to pay the subsidy. In order to avoid a number of exceptions, Msgr. McElroy suggested an amendment: "For parishes which are not financially able to meet this subsidy, the Department of Catholic Schools will be asked to designate scholarship funds for this purpose." It was seconded. Msgr. O'Connor agreed that this could be a hardship on certain parishes, but, by putting that in the policy, a "pandoras box" could be opened. Msgr. McElroy said he understands the concern, but if it is spelled out in the policy, people will know there is an avenue for them. The Superintendent of Catholic Schools would monitor the policy. Fr. Dreier suggested that, rather than put the whole onus on the Superintendent of Catholic Schools, it could be a joint decision with the Vicar of Administration.

Archbishop Levada expressed concern about allocating other uses for the limited amount of scholarship funds. To preserve equity in this matter, there are two issues to consider: one is the poor parish that is the sending parish and the other is the financial need of the school and parish receiving the funds. It may be that some of the people going to the schools do not need

help. The overall plan is a very good one, and the reason he thinks it is so good is precisely because it fosters the bonding of families with their own parish.

Msgr. McKay said that he has a problem with the idea that the proposed policy applies only to parishes with schools. His personal feeling is that it is a point for the parishioners rather than the parish. Fr. Walsh noted there are so many different situations with parishes that need the money and those that don't. He suggested a basic policy that, in principle, requires a parish without a school to provide a subsidy, but with the provision that agreements can be made between parishes or with the Archdiocese to assist in individual instances. He showed concern that such a policy might be too vague, but supported a position that would give a general direction in which to move, while allowing flexibility for people in which to apply it to their particular circumstances. Msgr. McElroy proposed a friendly amendment to amend his earlier amendment: "The Archbishop will consult with the Vicar of Administration and the Superintendent of Schools to work out a way to assist those parishes for whom this would be a burden." We are only talking about five or so poor parishes that do not have schools, amounting to the potential of around \$5,000. He moved the question with the provision that the policy be reviewed in two years.

CR 99-00: 2 The Council of Priests recommends to the Archbishop and to the Archdiocesan Board of Education the policy that parishes without schools will subsidize their parish students, and the home parish will be required to certify parishioner status prior to a lower tuition rate being granted by the school. The subsidy rate will be set by the Archdiocesan Board of Education based on the average of the difference between an in-parish and out-of-parish rate. The subsidy would be enforced even though the school does not have the distinction between in-parish and out-of-parish. The Archdiocesan Board of Education would also establish criteria for certification by parishes. The Archbishop will consult with the Vicar of Administration and the Superintendent of Schools to work out a way to assist those parishes for whom this would be a burden. The families will be expected to fulfill other requirements of the school, such as scrip, service hours, etc. This policy would be effective beginning the school year 2001-02. It will be reviewed in two years after its inception. In Favor: 24; Oppose: 3 (Cloherty, Daly, Sammon); Abstain: 2 (Cwiekowski, O'Connor).

V. RETIREMENT COMMITTEE - Rev. Harry Schlitt

Fr. Schlitt reported that he is trying to arrange a meeting with two lay people who have tax and pension expertise for advice on the vesting issue, as part of the retirement benefit package. This is a very complicated issue with definite budget implications and the two experts were instrumental in putting together both of the retirement plans for the Dioceses of San Jose and Oakland. He hopes to have a report for the May meeting.

VI. EVALUATION OF CAPITAL CAMPAIGN - Rev. Harry Schlitt

Fr. Schlitt introduced Mrs. Joanne Maher, the Acting Director of the Office of Stewardship and Development who will become Director, July 1, 2000. Mr. Mike DeNunzio, the former

Archdiocese. Mrs. Maher will be handling the evaluation of the capital campaign and she and Fr. Schlitt prepared a form to send to the pastors to complete. He asked the Councilors for their opinions of the form and the process. Fr. Calvo observed that the approach of the evaluation instrument appears to assess from the perspective of the campaign by asking the parish if they did what they were supposed to do. He suggested that there should be input requested from the parish point of view. For instance – “Was this the approach you would have taken? What did you do that was not part of what was supposed to be done? How did that work? How would you have liked to have that done?”

Fr. Sammon noted that Community Counseling Service (CCS) left out the whole question that finance committees and parish councils know their parishes best and the parishes were successful because in a large measure they went against what CCS told them to do. He feels that to start out evaluating the parishes is not the right tactic in this assessment tool. Fr. Vitale suggested that the evaluation begin with questions asking if the campaign was successful in the particular parish, and end with what the parish found to be the most useful step in the process. Fr. Sammon suggested two questions: First, “Was our investment worth it?” - Many of the pastors had the experience of the campaign people taking credit for things they did not do, because the parish was successful in spite of CCS advice; Second, “Did the CCS instrument work?” - This evaluation should give the opportunity to show the kind of tension that came up with the CCS model that was imposed upon the parishes in this Archdiocese, assuming that model would fit all parish profiles.

Fr. McCotter asked for the total raised in the campaign so far, and Fr. Schlitt answered that the amount raised for the educational campaign was \$18 million, exclusive of the amount the parishes raised in excess of their quotas. There were three categories with a total goal of \$30 million. The parish goal was \$10 million and they achieved that goal and anything in excess of that was allowed to stay in the parish. The goal for major donors was \$15 million. The goal for corporate gifts was \$5 million. Archbishop Levada noted that the major donor goal has been affected, partially because of his Santa Rosa duties where he had to step back from some of the opportunities of asking people for donations. He feels the major donor goal was too optimistic and he would be surprised if it reached beyond \$12 or \$13 million. He has not been involved in the corporate giving program but hopes to be so. Joanne Maher said that the major donors and corporate category are different from the parishes in that there will be an ongoing effort from the Office of Stewardship and Development to continue corporate and major donor solicitations and make this a continuing living campaign. From that standpoint, it is too soon to say that it has been unsuccessful. Msgr. McElroy said that Santa Rosa has taken an immense amount of the Archbishop's time, dealing with a very divided and betrayed and alienated situation. They needed help and the Archbishop gave that help, even at the cost of the educational campaign. The Archbishop answered the higher call and did the right thing and everyone should recognize that fact.

Msgr. McElroy noted an underlying cause of concern among the priests regarding the campaign and how it was done. It has to do with the honesty of the figures in the statements sent out, which obviously were not accurate. They were slanted in a way that did not register reality, and CCS lost credibility. He recommended, as an additional step in the evaluation, a