

“The love of Christ urges us on.”

2 Corinthians 5:14

The Catholic
Service &
Ministry Appeal



Catholic Service & Ministry Appeal

Mid-Year Report to the Laity

July 1-December 31, 2008

Diocese of Belleville
222 South Third Street
Belleville, IL 62220
618 277-8181

Prepared by the Agency Allocation and Accountability Committee

March 2009

Dear Faithful Catholics of the Diocese of Belleville,

You may remember the Agency Allocation and Accountability (AAA) Committee was created in January, 2007, to provide recommendations for the allocation of Catholic Service and Ministry Appeal (CSMA) funds, to promote accountability and build maximum trust. We are accomplishing these tasks with added lay involvement and a strong commitment to you. We have articulated this commitment to you, the people of the Diocese of Belleville, in the following pledge.

We promise ...

- we will be fully knowledgeable of the Diocesan ministries' purposes and mission and their abilities to carry out their intended work.
- we will have available current financial statements and know who will actually be doing the work of the ministry.
- that all gifts will be used as you intend.
- our relationships with all people and ministries will be professional.
- to support your right to ask questions about CSMA, AAA Committee and CSMA
- our cooperation and will work to get you prompt and accurate answers.

To fulfill these promises the Agency Allocation and Accountability Committee has developed a process to make knowledgeable funding recommendations for 18 of the agencies/ministries in the diocese. In this mid-year report, we would like to share with you the guiding principles that are the cornerstones of our deliberations.

Also, we will provide more in-depth information on how these principles have shaped our difficult decisions for funding recommendations. In our first year of making allocation recommendations, the 2008-2009 Catholic Service & Ministry Appeal raised \$1.5 million. The 18 ministries/agencies that rely on the Catholic Service & Ministry Appeal submitted requests amounting to \$1.9 million, creating a shortfall of \$400,000. The Agency Allocation and Accountability Committee faced no other choice but to recommend cuts to the ministry/agency requests. This has greatly hampered the ability of our ministries/agencies to serve our brothers and sisters in Southern Illinois.

It is the goal of the Agency Allocation and Accountability Committee to help generate a greater understanding of the allocation process. At the same time, we strive to build trust in the Catholic Service & Ministry Appeal and make it a most respected method through which the people of the Diocese can support the mission of the local Church.

On behalf of the Agency Allocation and Accountability Committee,

Phyllis Dumstorff, Chair-Breese

As Catholic Service & Ministry Appeal stewards, the Agency Allocation and Accountability Committee strives for the highest ethical standards in our decision making process. Also, we feel that there is a check and balance system in place throughout the whole Catholic Service & Ministry Appeal allocation process.

I. We utilize an analytical, fact-based decision making process.

The AAA Committee has gone through two cycles of site visits. Two to four different people have visited each agency/ministry receiving CSMA funds and prepared a report based on interview information provided by the director of the agency/ministry. This report includes impressions, strengths, weaknesses and other observations that may be relevant to the Committee. Copies of all site visit reports are distributed to all Committee members for review.

In Committee meetings, members give oral reports on their site visits and answer questions from other Committee members. The ministry/agency operating budget and the CSMA Funding Request are reviewed and analyzed. The members also look at many other factors, i.e., income from sources other than the CSMA, the scope of service, if the service could be accomplished by an individual parish, if we are funding similar ministries/agencies at the same level of support, etc. With all this information in hand, the AAA Committee makes a funding recommendation that is impartial and justifiable.

Our recommendations are forwarded to the Diocesan Finance Council. This is a group of clergy and laity with expertise in financial matters. The Diocesan Finance Council makes the final allocation recommendations to the Bishop, based on their in-depth knowledge of the CSMA and the recommendations of the AAA Committee.

The Bishop grants final approval of the allocations and the Finance Office makes the disbursement of funds to the agencies/ministries. The Finance Office also makes a presentation to the AAA Committee on the final allocations granted to each one of the agencies/ministries. As a final verification that the agencies/ministries received their allotment of funds, we ask the agencies/ministries to verify the amount of money that they received the previous year on their CSMA Funding Request Form. This keeps the AAA committee informed of what was distributed from the Diocese and what was received by the agencies/ministries.

2. We review a variety of documentation from every agency/ministry receiving CSMA funding.

The AAA Committee is diligent in gathering as much information as possible about the ministries and agencies that are the beneficiaries of your generous support. In addition to the information obtained from the site visits, ministry/agency budget forms and the application for CSMA funds, the Committee requests a year-end summary from each ministry/agency on how your gift has benefited their work. This information is published in the Year-End Report to the Laity.

3. We accept the responsibility of being good stewards of your contribution and provide transparent allocation reports for your review.

This realization of our stewardship responsibilities has strongly influenced the actions of the AAA Committee. We have created a mid-year and annual report to keep you, the people, informed of our work. To minimize mailing expenses and ensure that our reports are received by the faithful of the Diocese, we try to include our reports in scheduled mailings to you or distribute them directly to the pastors, requesting that the reports be inserted in the Sunday

bulletin. A press release on every AAA Committee meeting is submitted to *The Messenger* Newspaper.

Furthermore, The Most Reverend Edward K. Braxton and members of the AAA Committee have established and approved the formation of the CSMA as a 501 (c) (3) Corporation. This action will help protect the assets of the CSMA against any legal claims and ensure that the money will be used as the faithful people of the Diocese intended. Under this structure, the AAA Committee will continue their work in recommending allocations of the CSMA funds. More information about the CSMA incorporation will be provided by means of articles in *The Messenger* Newspaper.

In closing this report, we want to thank you, the people of the Diocese, for your support and confidence. We have heard many positive comments about the AAA Committee and about the information we are providing. If you have any comments, please pass them along to one of the Committee members or call the Office of Stewardship at the Chancery Office, phone 277-8181 and one of the staff members will forward your comments to the AAA Committee.

-----AAA Committee Members-----

Mr. Don Bierman, Carmi; Phyllis Dumstorff, Breese; Reverend Daniel Friedman, Aviston; Reverend Robert Gore, Hecker; Reverend Gary Gummersheimer, Murphysboro; Reverend Monsignor Jerome Hartlein, Mascoutah; Mrs. Rose Hogan, Anna; The Very Reverend John McEvilly, V.G., Belleville; Reverend Joseph Rascher, Caseyville; Mrs. Kappy Scates, Shawneetown; Mr. Robert Shaw, Mt. Vernon; Mrs. Yvonne Shepherd, Red Bud; Ms. Margy Spezia, Cahokia; Sr. Catherine Wellinghoff, Johnston City, Mr. William Weber, Ingraham; Reverend Robert Zwilling, Radom