

# DFMC Herald

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## Tasks of Administration Turn to Legal Issues

**Mary Angela Shaughnessy, SCN, J.E., Ph.D.**, University Counsel, Professor of Education, will keynote the opening session of the Diocesan Fiscal Management Conference (DFMC) in the ballroom of the Adam's Mark Hotel in Saint Louis, Missouri on Sunday, September 30, 2001 at 5:30 p.m. Sister Mary Angela will address the theme of the 32nd annual gathering under the title of **"Administration Leads Us to Law."** This presentation will address how the tasks of administration eventually turn to legal issues. Pertinent examples and cases will be cited. Using a storytelling approach, Sister Mary Angela will attempt to weave a tapestry of the interconnectedness of law and administration. The presentation will prepare participants to address individual legal issues during the remainder of the three-day conference. Prior to the keynote address, **Most Rev. Joseph F. Naumann**, Auxiliary Bishop and Vicar for Finance of the Archdiocese of Saint Louis, will welcome the attendees on behalf of Most Reverend Justin F. Rigali, Archbishop of Saint Louis.

Sister Mary Angela Shaughnessy is a Sister of Charity of Nazareth who has taught at all levels of Catholic education from elementary through graduate school. She



*Mary Angela Shaughnessy, SCN, J.E., Ph.D.*  
*Spalding University, Louisville, KY*

served eight years as Principal of a Catholic high school. Sister Mary Angela has a bachelor's degree in English and a Master's degree in Education from Spalding University (Louisville, KY), a Master's degree in English and a Law Degree from the University of Louisville (KY) and a Ph.D. in Educational Administration and Supervision from Boston College. Her research centers on civil law as it affects Catholic education and church ministry.

Sister Mary Angela has authored twenty some texts and is currently visiting professor in Boston College's Catholic School Leadership Program and in the University of San Francisco's Institute for Catholic Educational Leadership. Sister was appointed by the former U.S. Secretary of Education, Richard Riley, to several important White House



*Most Rev. Joseph F. Naumann*  
*Auxiliary Bishop*  
*Archdiocese of St. Louis, St. Louis, MO*

committees. She is the recipient of numerous awards, including the National Catholic Educational Association Secondary Schools Department award and the D'Amour O'Neill Award for Outstanding Service to Catholic School Boards. In 1997 she was named one of the twenty-five most influential persons in Catholic education over the past twenty-five years.

Opening the keynote session, all conference members and their guests will be welcomed to the Archdiocese of Saint Louis by **Most Reverend Joseph F. Naumann**, Auxiliary Bishop of Saint Louis. Bishop Naumann will also be chief celebrant and homilist of the major conference liturgy Monday evening at The Basilica of St. Louis, King of France in downtown.

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## Board of Directors:

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## The Shepherd Speaks

In Chapter 17 of St. John's Gospel, Jesus says to his Heavenly Father: "Your word is truth." Truth — what is truth? Every day our news media reports on the struggle of judges and lawyers and juries to ascertain the truth. In court proceedings, there are always pointed accusations and firm denials which call to mind the question Pilate asked in the presence of Jesus: "What is truth?" Truth can be compromised and ridiculed, assaulted and denied, but truth can never be defeated. In the end, truth will triumph.

Recall the example of Archbishop Oscar Romero of San Salvador. He was murdered by death squads because he spoke the truth and fought for justice. On Good Friday people nailed Truth to a cross, but on Easter Sunday, Truth rose gloriously from the dead, never to be defeated again.

St. Thomas Aquinas defines truth as "conformity between a thing and the intellect". A lie denies that conformity. One lie begets another lie, casting a net of deceit and treachery that eventually envelops the liar. Only truth will set one free. Only truth gives peace.

Jesus stands before us in the New Testament and proclaims: "I am the way, the truth, and the life." Jesus has come into the world to bear witness to the truth, and his followers are now to be consecrated in the truth. Jesus' followers must search for the truth and live the truth. Jesus witnesses to the truth because he speaks of what he has seen and heard — the Father's love for us. In an eloquent passage in his First Letter, St. John tells us the apostles testify to "what we have heard and have seen with our own eyes, what we have looked at and touched with our hands...we are witnesses and we are proclaiming him to you" (1 John 1:1-2). This is truth. This is testimony based on fact.

We live in a global village made smaller each day by new means of communication. How trustworthy, how reliable, how truthful are these means of communication? We run the risk of



Most Rev. Donald W. Trautman, STD, SSL  
Bishop of Erie

no longer knowing what is true or believing there are as many truths as there are viewpoints.

We need to rediscover that truth is one.

Glib words and slick public relations skills cannot suppress the truth. We must seek the truth behind the images of deception. Those who work for the press, radio, or television should be in the service of the truth. They are the servants of our right to accurate information. Their profession gives them great power over others. There is an immense task to be done here. An ethic of service must be constructed which would be more and more in keeping with the Gospel and corresponding to the intrinsic demands of professionalism. Jesus has prayed for us that we be protected, kept safe from the contamination of the world. He has sent us into the world to bear witness to the truth.

Truth must never be separated from charity. There are situations which call for silence, especially when to tell the truth means to lack love. Truth must always be spoken with charity in mind. For example, to spread news which, even if true, injures a person's good name or dignity is certainly an action against charity even if done in the name of truth. Let us speak the truth, correcting evil; but let us speak the truth in charity.

St. John in his Gospel records that Jesus has prayed to his Father for us saying: "Father most holy, protect them...keep them safe and consecrate them in the truth." Jesus' prayer will not be in vain. †



## Spirituality @ Work: 10 Ways to Balance Your Life on the Job

By Gregory F.A. Pierce  
Loyola Press © 2001

ISBN: 0-8294-1349-9  
\$17.95

For over three years, author and publisher Gregory Pierce and 400 other working people have grappled with connecting faith and work through an e-mail discussion group. Together they explore a spirituality that involves getting into the world rather than away from it. Pierce's new book *Spirituality @ work: 10 Ways to Balance Your Life on the Job* (Loyola Press, February 2001), grew out of this continuing discussion. It's a blueprint for integrating the seemingly diametric worlds of spirituality and work.

Challenging the conventional wisdom on the nature and practice of spirituality, Pierce argues that the contemplative life is not the only way to connect with the sacred, and that spirituality should not be confused with religion or piety. In fact, he writes for the "piety-impaired" – those who, like himself, are uncomfortable with displays of religiosity, especially in the workplace.

Instead of adapting traditional disciplines to the workplace, Pierce calls for a new mode. "If a spirituality of work is going to be successful, it cannot be based on exercises that take us away from the daily grind" he says, "but rather must allow the daily grind to be grist for our spiritual mills."

Pierce offers a set of disciplines tailored for the workplace, where they can be done "consistently, without disrupting work, and without anyone knowing what you are doing." They embody values of honesty, integrity, loyalty, encouragement, justice and generosity. Among the practices he mentions are surrounding yourself with sacred objects—anything from a piece of religious art to family photos; living with imperfection in yourself and others; giving thanks and congratulations; building support and community; and dealing with others as you'd have them deal with you.

Like all spiritual disciplines, these have to be done faithfully and regularly, Pierce says. He provides tips for implementing each one, with examples of how to personalize them. Participants in his free e-mail group (available at [gfpierce@aol.com](mailto:gfpierce@aol.com)) share ideas for intentional spirituality in the workplace in sidebars throughout the book.

## Keynote Session

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Born in 1949, Bishop Naumann received his minor seminary education at St. Louis Preparatory Seminary South where he was a charter member of the Justin A. Nelle Chapter of the National Honor Society and graduated in 1967. He graduated from Cardinal Glennon College in 1971 and completed his theological studies at Kenrick Seminary (St. Louis) in 1975. On May 24th of that same year he was ordained to the priesthood.

Bishop Naumann served as Associate Pastor in several archdiocesan parishes between 1975 and 1989. From 1989 to 1994 he was Pastor of Ascension Parish in Normandy, Missouri. Between 1994 and 1997 he was Vicar General and Vicar of Finance for the archdiocese. During this time from 1984 to 1995 Bishop Naumann was coordinator of the Archdiocese Pro-Life Conference.

Currently, Bishop Naumann serves on the U.S. Catholic Bishops' National Advisory Council, the Boards of Directors of the Missouri Catholic Conference, Directors of the Birthright International/Birthright Counseling-St. Louis and the St. Louis Clergy for Life.



## Selected Works of Joseph Cardinal Bernardin

Liturgical Press  
\$34.95 Single/\$62.50 Set

In October 1996, Cardinal Joseph L. Bernardin of Chicago was asked to consider compiling some of his major texts for future publication. The subject came up again the week before he died in November of that year.

"Al, you'll have to do that for me," he told Precious Blood Father Alphonse Spilly. It's no wonder, then, Father Spilly says, that "it's a very emotional thing for me to actually hold the volumes in my hands. Carrying out his wishes was a long endeavor, but a labor of love."

Fr. Spilly, who was Cardinal Bernardin's special assistant for 12 years, spent more than three years re-reading some 450 major talks and 1,600 homilies to choose what he calls "the essential Bernardin."

Now in bookstores, the 1,400-page *Selected Works of Joseph Cardinal Bernardin* was published in two volumes by the Liturgical Press of Collegeville, Minn. (\$34.95 per volume, \$62.90 for the two-volume set).

The first volume includes official documents issued during the cardinal's tenure as archbishop of Chicago (pastoral letters, reflections, statements and synodal interventions) and selected homilies, most never published.

The second volume includes texts that dealt specifically with the life of the church and the life of society. Among the issues treated are peacemaking, the need for a consistent ethic of life, health care, Catholic-Jewish dialogue and the Common Ground initiative.

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Long term members and attendees of the DFMC annual conference will be honored in St. Louis during the 32nd Annual DFMC conference. The DFMC Board of Directors has determined that members would be recognized in the same year as they attain various recognition levels. It was also determined that the list of those to be honored should be published in *The Herald* prior to the meeting for the purpose of allowing any oversights to be corrected in advance of the annual meeting.

*Provided they register and attend, those to be recognized this year are as follows:*

## For 25 Years of Attendance

**John R. Baker**  
**Msgr. William Fitzgerald**  
**David J. Murphy**  
**Michael F. Nolan**

Archdiocese of Kansas City, KS  
 Diocese of Trenton  
 Diocese of Erie  
 Diocese of Nashville

## For 20 Years of Attendance

**Thomas A. Kurkowski**  
**James P. Lynch**  
**Henry J. Petrilli**

Diocese of Green Bay  
 Diocese of Joliet  
 Diocese of Springfield, IL

## For 15 Years of Attendance

**Msgr. Patrick J. Caverly**  
**Joseph P. Corsetti**  
**Jose A. Debasa**  
**Joseph R. Mahoney**  
**John J. Maxwell**  
**Msgr. John R. McSweeney**  
**Philip B. Miles**  
**James P. Quinn**  
**Robert H. Quinn**  
**Richard R. Schaefer**  
**Gregor A. Seagrave**  
**Jeffrey J. Tescher**

Diocese of Orlando  
 Diocese of St. Petersburg  
 Archdiocese of Los Angeles  
 Diocese of Lansing  
 Diocese of Springfield, IL  
 Diocese of Burlington  
 Archdiocese of Atlanta  
 Diocese of Scranton  
 Diocese of Lafayette, IN  
 Diocese of Marquette  
 Diocese of Corpus Christi  
 Diocese of Bismarck

## For 10 Years of Attendance

**William J. Connell**  
**Philip J. Creider**  
**John S. Czachorski**  
**Mary Ann Davis**  
**Bernadette W. Faretra**  
**Phillip H. Gallagher, Jr.**  
**Joseph G. Luttringer**  
**Cindi Mitchell**  
**James M. Rinefierd**

Diocese of Norwich  
 Diocese of Tulsa  
 Diocese of Grand Rapids  
 Diocese of Baker  
 Diocese of Charleston  
 Archdiocese of Philadelphia  
 Diocese of Pittsburgh  
 Diocese of Reno  
 Diocese of Rochester

## From the Desk of the Executive Director



*Rev. Robert J. Yeager, Ed. D.  
Diocese of Toledo*

All the joys of the Easter and the spring season be yours! A great deal of this issue of *The Herald* is devoted to our 32nd annual conference, which will be held in St. Louis this year at the Adam's Mark Hotel. Deacon C. Frank Chauvin is our site chairperson. The Board of Directors and I have enjoyed our work with Deacon Chauvin and his staff over the past months in anticipation of the arrival of our members in St. Louis. More about the details of this event later in this article.

However, even with this planning going on, I want to bring your special attention to a new event that the DFMC will host for the first time in May 2002. Arrangements are being completed for the first fly-in seminar on May 2 and 3, 2002, which will be a legal seminar directed by Father Robert T. Kennedy, J.D., J.U.D. The program will feature material from Book V of the Code of Canon Law and its relationship to fiscal officers. Much more detail will be available later this spring, but I do want to bring the date to the attention of our membership so that you might mark your calendar. An early registration will be offered at the St. Louis conference site in September 2001. The

Board of Directors is excited to be able to offer this mid-year seminar and hopes that many of the members will join them in Pittsburgh at the new Hyatt Regency Airport Hotel. I expect to send each Chief Financial Officer a brochure for this program no later than August 1, 2001. If you have questions in the meantime, give the National Office a call.

Special thanks to all members who have referred additional exhibitors and sponsors to the National Office since the close of the Washington conference last September. We have been much blessed by the early grants and sponsorships that have been given toward our St. Louis meeting. When you receive your Preliminary Program you will see a complete list, but I do wish to bring to your attention that major grants and sponsorships are already in place from Our Sunday Visitor; Christian Brothers Investment Services, Inc.; Allied Irish Bank; The Schott Group; American Express Asset Management Group, Inc.; Mutual of America; McHugh Associates, Inc.; National Catholic Services LLC; Knights of Columbus; Mission Management and Trust Company; Rittenhouse Financial Services, Inc.; Arthur J. Gallagher and Company; Great Lakes Advisors, Inc.; Peregrine Capital Management; and Catholic Mutual Group.

I regret that an incorrect web address was published in the last issue of *The Herald*. **Our correct web address is [www.dfmconf.org](http://www.dfmconf.org).** If you have not checked the website recently please take a moment to do so. We now have a

number of notices posted in the section entitled "Current News" that will be of interest to all. This site is just now beginning to be of service to all members in a way that the founders of our conference would have been very proud of. We can now post a question or need of a member and he/she can get immediate response to his/her own e-mail address without any intermediary. In a manner of speaking, our original round tables have really come of age!

The full Preliminary Program has been mailed to you. I must urge you again to complete your registration as early as possible after you receive your material. Please note that the deadlines for conference registration and hotel registration are different. There is also a still later deadline for tour requests. Each of these deadlines is set with members' comfort in mind. Please pay careful attention to them when you complete your materials. There are very limited options for early arrivals and late departures this year, so if you have either of these options in mind, please contact Plaza Travel Center at your earliest opportunity.

We will honor our long-term conference attendees in St. Louis. On page 4 of this issue of *The Herald* you will find the list of those who are eligible for attendance awards this year according to our records. **Please review this list.** If you note any reason for additions to or deletions from the list, notify the National Office at once. We can accept adjustments to the list only until June 30,



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# Guidelines on Copyright

*This guide does not presume to be a comprehensive summary of the Copyright Act of 1976. It does not attempt to deal with all the issues covered by the legislation, nor does it provide answers to many legal questions. It is intended to help users of church music understand the nature of copyright in order to improve their ministries, to maintain a proper standard of ethics and to protect themselves and their churches from incurring liability or subjecting themselves to the possibility of being embarrassed or even sued. The questions addressed are those most frequently asked by church musicians.*

*A complete copy of the Copyright Law of 1976 and further information may be obtained by writing: The Copyright Office, Library of Congress, Washington DC 20559; or by using the website of the Library of Congress, [www.loc.gov/copyright](http://www.loc.gov/copyright).*

## 1. What does “copyright” mean?

Our nation’s founders determined that it was in the public interest that the creative works of a person’s mind and spirit could belong, for a limited time, to the creator. The protection of these works is called “copyright.” Thus, the United States copyright law grants to any copyright owner the exclusive rights to original material for a term that usually is *equal to the length of the life of the author/creator plus 70 years*. (For many songs written prior to 1978, the term is 95 years total.) The copyright owner is the only one who has the privilege of reproducing the work. If any other party wants to reproduce the material in some manner, permission must be obtained from the copyright owner.

Visible notice of copyright should appear on all copies of copyrighted music. Whether on the owner’s original works or on permitted copies, the notice should be visible and contain the word “copyright” or the symbol © (for printed material) or (p) (for sound recordings), the year of the first publication, and the name of the copyright owner.

## 2. What are the rights of copyright owners?

Copyright owners have the right to reproduce the copyrighted work in printed copies or *with any duplicating process* now known or that later comes into being; to make arrangements and

adaptations of the copyrighted work; to distribute and/or sell printed or recorded copies of the work or to license others to do so; to perform and/or display the copyrighted work.

## 3. Who owns the legal right to make copies?

The original creators (authors and composers) and/or publishers, their assigned agents, and so on, can legally make copies of a copyrighted work.

## 4. Do other countries have copyright laws?

Yes. Most of the world now recognizes the need to give incentive and protection to creative persons. Copyrighted material owned by U.S. citizens is protected in many countries by those countries’ copyright laws and treaties with the U.S.

## 5. What if I’m faced with a special situation?

If you want to include copyrighted lyrics in a song sheet, arrange a copyrighted song for four baritones and kazoo, or make any special use of copyrighted music that the publisher cannot supply in regular published form, the magic word is *ask*. You may or may not receive permission, but when you use someone else’s property you must have the property owner’s consent.

## 6. What if there’s no time to write?

Think of copyrighted material as a piece of property and you’ll be on the right track. *Plan ahead*. Some publishers routinely grant permission over the phone.

## 7. What about photocopies or recording that are already in our church?

Destroy unauthorized photocopies and recordings, and replace them with legal editions. Possession of any illegal copies is the same as harboring stolen goods.

## 8. Are we permitted by law to perform copyrighted religious works in church?

Yes. You are permitted by law to perform copyrighted religious works from legal editions in the course of services at places of worship or in religious assemblies. Legal editions do not result from unauthorized duplication of religious works. Purchasing one copy of sheet music, then making 30 copies for the choir without permission is not legal or ethical.

## 9. Can I make an original recording of a copyrighted song?

Yes, but you must secure a recording license (also known as a mechanical license) from the copyright owner and pay a specific royalty per song, per recording.

*Continued on next page*

**10. Can I make a recording using a pre-recorded instrumental accompaniment track?**

You may do so provided you have proper permission. Two different permissions are necessary in this situation. The first is from the copyright owner of the selection to be recorded, and the second is from the producer/manufacture of the accompaniment track. Fees are usually required for each permission.

**11. Must I get permission to make copies of copyrighted music? Print songbooks or song sheets containing copyrighted works for use in churches, Bible studies or prayer groups, as long as they are not sold? Make a photocopy of a copyrighted work for my accompanist in order to sing a solo? Make videos of worship services or special musical presentations such as those for holidays, for youth or for children? Make a MIDI or another kind of electronic reproduction? Make a recording or video available through the Internet, on a website or by any other kind of electronic medium?**

All the above activities are permissible provided that permission is secured prior to any such use or means of duplication.

**12. Is there a source I can contact to obtain permission to use many assembly-sung compositions?**

Some publishers and songwriters license their own compositions. Others combine with a licensing agent that offers blanket permits for assembly use at a fee that is usually annual. One such agent is New Dawn Music, P.O. Box 13248, Portland OR 97213-0248. New Dawn licenses all music copyrighted by:

- OCP Publications
- New Dawn Music
- North American Liturgy Resources (N.A.L.R.)

- St. Thomas More Group, England
- TEAM Publications
- St. Meinrad Archabbey
- Gooi en Sticht, Baarn, The Netherlands
- ISEDET, Buenos Aires, Argentina
- San Pablo Internacional, S.S. P., Madrid, Spain
- Ediciones Musical Pax, Madrid, Spain
- Editorial Apostolado de la Prensa, Madrid, Spain
- Ediciones Musica-Liturgia y Oracion, Pamplona, Spain

But note that this license is for assembly-sung music only. The license does not convey the right to photocopy or duplicate any choral or instrumental sheet music, accompaniments, arrangements for keyboards, handbells or other instruments, choral songbooks or other ensemble works.

**13. What if I can't find the owner of a copyrighted song? Can I go ahead and use it without permission?**

No. Check the copyright notice on the work or contact the publisher of the collection in which the work appears. Once you know the name, write or call the copyright owner. If you need assistance locating the address or phone number, call New Dawn Music, 800-243-3296, or write Music Publishers' Association, 711 Third Ave. New York NY 10017.

**14. What about out-of-print items?**

Most publishers are agreeable, under special circumstances, to allow reprinting of out-of-print items, but permission must be secured from the copyright owner prior to any duplication.

**15. What is "public domain"?**

If a song is in the public domain, the

copyright protection for the song has expired and the song is dedicated to the public for use as it sees fit with no permission required from anyone. The absence of a copyright notice (see question 1) is one indication that a song may be in the public domain.

**16. What is "fair use"?**

Fair use is not generally available to churches. Fair use is established by statute and interpreted by the court. It permits portions of copyrighted works to be legally reproduced for purposes of criticism, comment, news reporting, classroom teaching, scholarship and research. In no instance does this apply to a performance. The various interest groups involved have agreed upon guidelines that constitute the minimum and not the maximum standards to educational fair use. If you are interested in a copy of these guidelines, please contact the Copyright Office (address above).

**17. Is it permissible to make duplicates of the recording that accompanies a musical or printed work to use for "learning" or "rehearsal" purposes?**

No. It is illegal. As good as this idea is, and as helpful as it would be to teach the music to members of the choir, such duplication without permission is against the law. Write or call the publishers of the music. They will inform you of their requirements concerning your request.

**18. If I buy a recording, is it permissible to make a copy for a friend?**

Duplication of copyrighted materials is against the law when the purpose avoids a legal purchase.

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## Concurrent Sessions Feature Human Resource Issues, Parish Fraud and Tax Developments

Concurrent sessions of the 32nd annual DFMC conference will be held on both Monday afternoon, October 1 and Wednesday afternoon, October 3. Three topics will be presented each day with two separate sessions each afternoon. This will afford each participant the opportunity to take part in as many as four different presentations. This article introduces three of the subjects and their presenters. The remaining subjects and speakers will be featured in the August 2001 issue of *The Herald*.



**Linda L. Bearie**

*Diocese of San Jose, San Jose, CA*

**“It’s All About Fit: Hiring and Firing Ethically and Legally”** will be addressed by **Linda L. Bearie**, Chancellor and Director of Personnel for the Diocese of San Jose, CA on Monday, October 1 at 1:30 p.m. and 3:00 p.m. Trepidation is often the backdrop for employer’s hiring and firing tasks. Ms. Bearie will suggest the skills needed to move from the “honeymoon” period of hiring, where ne’er a *discouraging* word is spoken, to the point of involuntary separation, where ne’er an *encouraging* word is spoken. This presentation will provide process, pointers and prescriptions to help ensure that the Church employment

relationship begins and ends in honesty, good will and dignity.

Formerly a teacher and administrator at Archbishop Mitty High School for ten years, Ms. Bearie has been Director of Personnel since 1990 and Chancellor for the Diocese of San Jose since 1996. As Director of Personnel she is responsible for all aspects of personnel administration in the diocese including the chancery offices, 50 parishes, three missions, 28 elementary schools, two high schools and two cemeteries. As Chancellor she oversees six departments including the chancellor’s office, records and archives, missions, personnel, central services and information systems. Additionally she acts as liaison with the larger church as an ecclesiastical notary and with responsibilities for various national and Vatican related reports.

Linda Bearie holds a Bachelor of Arts degree in English from San Jose State University (San Jose) and a Master of Arts degree in Marriage, Family and Child Counseling from Santa Clara University (Santa Clara). Bearie has conducted workshops and consultations for schools, parishes, dioceses, religious and industrial organizations. She is an instructor for the Institute for Leadership in Ministry (San Jose) and an adjunct professor, College of Professional Studies, University of San Francisco (San Francisco). She holds memberships in the National Association of Church Personnel Administrators (NACPA) and the Society for Human Resource Management.

**“Fraud From A Parish Perspective/Actual Situations”** is the first of three concurrent sessions



**Kathy McKinless**

*KPMG, LLP, Washington, D.C.*

that will be presented on Wednesday, October 3 at both 1:00 p.m. and 2:30 p.m. by **Kathy McKinless**, a partner in the Washington, D.C. office of KPMG, LLP. Using a parish perspective and stressing actual situations, Ms. McKinless will discuss the application of internal controls to the parish and how the break down of controls can lead to fraud. Many practical actual examples will be reviewed in detail along with concrete standards for prevention and detection of parish fraud.

Kathy McKinless has a diversified twenty-five year background in public accounting, emphasizing not-for-profit and financial services industries. She has consulted to not-for-profits on such topics as re-engineering, activity based costing, fraud prevention and internal control, membership surveys, and performance improvement. McKinless has had significant experience auditing not-for-profits, religious institutions, employee benefit plans and large investment holdings.

McKinless is regularly responsible for audits performed in accordance with *Government Auditing Standards*. A regular instructor/speaker at national meetings,

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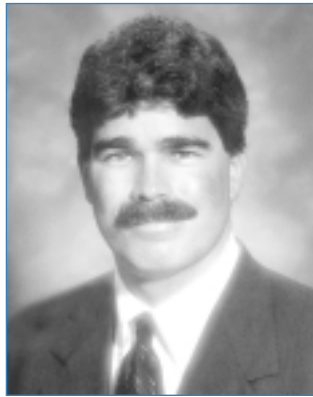
she has addressed the AICPA Not-for-Profit Industry Group, National Association of College and University Business Officers, and American Society of Association Executives.

Additionally, Ms. McKinless has served as President and Chairman of the Board of the Girl Scout Council of Washington, D.C., Treasurer of the Greater D.C. Cares and member of the finance committee for Catholic Charities USA. She holds MBA and BS degrees in accounting from the University of South Carolina. McKinless is a current member of both the Greater Washington Society of Certified Public Accountants and the American Institute of Certified Public Accountants.

**“Current Tax Related Developments”** will be addressed by **Patrick D. Schmiedeler** of the St. Louis, MO office of Deloitte & Touche, LLP on Wednesday afternoon October 3 at 1:00 p.m. and 2:30 p.m. This concurrent session will address current tax-related developments focusing on matters impacting tax-exempt organizations, as well as matters of general interest. Matters related to tax-exempt organizations will include a variety of topics featuring information reporting, compensation and benefits. General interest matters will include topics related to personal income taxation. Recent legislative and judicial developments will be discussed. Included will be an update on the status of proposed and/or enacted 2001 federal tax law changes.

Patrick D. Schmiedeler is a Senior Tax Manager with the St. Louis office of Deloitte & Touche, LLP. Mr. Schmiedeler has more than 14 years of public accounting and corporate experience in tax planning, compliance and consulting. He specializes in tax management for corporations and organizations. His experience includes tax planning for mergers and acquisitions, corporate restructuring and state and local tax matters. Five years as Domestic Tax Manager at Mallinckrodt and two years as Vice President-Taxes at Merit Behavioral Care Corporation, a Kohlberg Kravis Roberts & Company portfolio company, add significant corporate tax department management and operations experience to his background.

Mr. Schmiedeler is a graduate of the University of Notre Dame (Indiana), a certified public accountant (State of Missouri) and a member of the American Institute of Certified Public Accountants.



**Patrick D. Schmiedeler**  
*Deloitte & Touche, LLP, St. Louis, MO*

## Executive Director

*Continued from Page 5*

2001. A phone call, fax or e-mail message will accomplish any suggestion in this area that you wish to make. Speaking of long service, this is also the time of the year when members retire from diocesan service. If you, or someone you know is about to retire, please notify the National Office so that we can bring this fact to the general membership and note your retirement in a future issue of *The Herald*.

Our Board of Directors has been the heart and soul of our conference in recent years. All the wonderful conference programs that we have enjoyed, as well as the new legal seminar scheduled for May 2002 are their work. On page 10 you can note the invitation of the Communications Committee for candidates for board service. Please consider this seriously, as the conference is yours and will only continue to prosper if we have women and men on the Board of Directors that have a future vision for the DFMC.

Deacon Ronald Henderson, our Program Chairperson, as well as Deacon C. Frank Chauvin, St. Louis site-person, join the Board of Directors and your National Office staff in offering you an outstanding 32nd conference program. All of us are dedicated to bringing as many members as we can to our annual conference. To this end take note that grant funds are available to assure your presence in St. Louis. Please call, write or e-mail us to let us know how we might facilitate your coming and joining this very important annual event. **f**

## Board of Directors Nominations

The Diocesan Fiscal Management Conference Board of Directors is comprised of twelve to fifteen representatives of the member dioceses. Each year the terms expire for one third of the Board members, and nominees are recruited to run for these positions. It is desirable that a balance in the membership be achieved among clergy, religious, and lay persons; large, medium, and small dioceses; various geographic regions; various tenures; and various personalities.

The time commitment a board member makes is threefold. First, the board member is expected to attend all board meetings. Second, all board members serve on committees, which is how much of the board work is now accomplished. Committee work is done primarily by conference calls and correspondence and does require some time although it can be worked into one's busy schedule. The work required may be spread out over the course of the year or be more concentrated in a specific time period depending upon the nature of each committee. Board members also have some obligations during the conference itself.

All Board of Director's meetings take place at the up-coming conference site. At the mid-January meeting the board plans all details of the conference. This meeting begins on a Wednesday late afternoon and concludes at noon on Friday. Travel is scheduled so that members are home by Friday evening. At this planning meeting the Board determines the overall theme, topics and speakers. Board members are assigned the responsibility for indi-

vidual sessions, to contact presenters, and make appropriate arrangements.

The Board of Directors meets again at the site on the Saturday before the opening of the fall conference. This meeting typically begins at 1:00 p.m. and is completed by 6:00 p.m. Last minute conference details are completed at this meeting including the assignment of speaker introductions. Officers attend an additional planning meeting the first week of December to prepare for the full January board meeting.

The DFMC pays for the airfare, hotel and site costs for the board members for the December and January meetings. Since the member would normally attend the annual meeting, the DFMC does not assume any of the fall conference attendance costs.

The DFMC needs interested and willing members to run for the Board in order to continue to improve its excellent programs and meet the needs of the general membership. It is a very rewarding experience personally, professionally, and spiritually to serve on the Board (which is the reason why so many Board members run for a second term!). If you are interested in running for the Board, or if you would like to nominate someone, please contact one of the Nominating Committee members listed. We would like to present those running for the Board in the August issue of *The Herald*.

## The Communications Committee

**Ms. Bernadette W. Faretra**

Chair  
 Controller  
 Diocese of Charleston  
 1662 Ingram Road  
 Charleston SC 29407  
 843-402-9115 Ext. 13

**Ms. Margaret M. Fisher**

Director of Finance  
 Diocese of Youngstown  
 144 West Wood Street  
 Youngstown OH 44503  
 330-744-8451 Ext. 260

**Mr. John J. Maxwell**

Director of Finance  
 Diocese of Springfield in Illinois  
 P.O. Box 3187  
 1615 West Washington  
 Springfield IL 62708-3187  
 217-698-8500

**Deacon Jack F. Benware**

Chief Financial Officer  
 Diocese of Savannah  
 601 East Liberty Street  
 Savannah GA 31401  
 912-238-2324

**Mr. Kevin J. Heffernan**

Chief Financial Officer  
 Diocese of Burlington  
 P.O. Box 489  
 Burlington VT 50402-0489  
 802-658-6110

**Mr. John L. Hoffman**

(Non-Board Member)  
 Parish Financial Director  
 Diocese of Wheeling-Charleston  
 1300 Byron Street  
 P.O. Box 230  
 Wheeling WV 26003-0010  
 304-232-0444 Ext. 206

*If you are interested in running, please call one of the committee members.  
 Nominees will be introduced at the conference.*

## Book Reviews

*Continued from Page 3*

In a foreword to the book, Cardinal Roger M. Mahoney of Los Angeles says what is most striking about these writings is their profoundly personal tone.

“Authenticity rings through every one of his words,” he wrote.

Fr. Spilly believes the homilies will be the most popular part of the book. Arranged according to the liturgical year, some 85 homilies were chosen for publication.

“All his homilies were tailored to fit the specific occasion and the particular parish where he was speaking,” said Fr. Spilly. “So many of the homilies selected were preached at the cathedral—they are more generic.”

But no matter what the occasion or the subject of the talk, Cardinal Bernardin was “a real wordsmith,” according to Fr. Spilly.

The cardinal would edit the talks several times, whether they were written by himself or one of his staff. Most, however, eventually went through Fr. Spilly’s computer.

Sometimes the cardinal would remind his assistant to “read the text aloud to be sure his tongue didn’t trip over the words.” The trouble was, Fr. Spilly laughed, “we had different tongues.”

The collection also shows that Cardinal Bernardin took enormous interest in his teaching role, said his former assistant. “And he was not afraid to take on controversial issues.”

“Cardinal Bernardin played a significant leadership role in the Catholic Church, and I’m convinced that interest in his thought will continue well into the new century,” said Fr. Spilly, who is now director of the Joseph Cardinal Bernardin Center at Catholic Theological Union in Chicago.

*This review was written by Mary Claire Gart, who is a writer for the Catholic News Service.*



## Report of Independent Auditors

### The Board of Directors Diocesan Fiscal Management Conference

We have audited the accompanying statements of financial position of the Diocesan Fiscal Management Conference as of December 31, 2000 and 1999 and the related statements of activities and changes in unrestricted net assets and cash flows for the years then ended. These financial statements are the responsibility of The Conference’s management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audits in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Diocesan Fiscal Management Conference at December 31, 2000 and 1999 and the results of its operations and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States.

January 11, 2001

*Ernst + Young* LLP

# Diocesan Fiscal Management Conference

## Statements of Financial Position

	Years ended December 31	
	2000	1999
<b>Assets</b>		
Current assets:		
Cash	\$ 39,992	\$ 73,120
Investments (Note 1):		
Money market funds	67,015	3,065
Catholic United Investment Trust, primarily mutual funds	231,578	251,788
Total investments	298,593	254,853
Prepaid expenses	16,004	13,038
Total current assets	354,589	341,011
Furniture and fixtures (net of accumulated depreciated of \$1,344)	17,475	—
Deposits	—	18,819
Total assets	<b>\$372,064</b>	<b>\$359,830</b>
<b>Liabilities and unrestricted net assets</b>		
Current Liabilities:		
Accrued expenses	\$ —	\$ 10,000
Deferred income	100,900	95,350
Deferred grant	13,523	—
Total current liabilities	114,423	105,350
Unrestricted net assets:		
Undesignated	147,641	104,480
Board Designated	110,000	150,000
	257,641	254,480
Total liabilities and unrestricted net assets	<b>\$372,064</b>	<b>\$359,830</b>

*This information is derived from the financial statements of the Diocesan Fiscal Management Conference which have been audited by Ernst & Young LLP, independent auditors. The information should be read in conjunction with the financial statements, and related notes included therein.*

Revenues:
Vendor fees
Conference fees
Membership fees
Events fees
Speaker sponsorship
Interest and dividend income
Total revenues
Expenses:
Printing and postage
Board meetings
Administrative salary
Breakfasts
Secretarial
Lunches
Transportation/tours
Opening reception
Banquet
Speaker expenses
Space/equipment rental
Audio/Visual
Board reception and dinner
Closing reception
Hotel services and gratuities
Coffee breaks
Telephone/fax
Office remodeling
Technology expenses
Legal/insurance
Office supplies
Reproduction/courier
Registration expense
Utilities/service fees
Liturgies
Awards
Sponsorship fulfillment
Photography
Depreciation
Accounting services
Gifts
Dues and subscriptions
Hospitality suite
Miscellaneous
Total expenses
Excess (deficit) of revenues over expenses
Unrealized gain on investments
Change in unrestricted net assets
Unrestricted net assets at beginning of year
Transfers
Unrestricted net assets at end of year

## Statements of Activities and Changes in Unrestricted Net Assets

Years ended December 31

2000			1999		
Undesignated	Board Designated	Total Unrestricted Net Assets	Undesignated	Board Designated	Total Unrestricted Net Assets
\$216,500		\$216,500	\$204,450		\$204,450
145,890		145,890	141,221		141,221
97,500		97,500	60,750		60,750
15,728		15,728	19,810		19,810
15,000		15,000	15,000		15,000
13,112		13,112	11,371		11,371
503,730		503,730	452,602		452,602
60,717		60,717	61,951		61,951
48,633		48,633	42,094		42,094
47,380		47,380	46,000		46,000
34,963		34,963	30,326		30,326
32,019		32,019	2,952		2,952
27,650		27,650	16,213		16,213
27,057		27,057	38,474		38,474
25,403		25,403	28,924		28,924
25,046		25,046	23,884		23,884
18,957		18,957	24,556		24,556
17,692		17,692	15,686		15,686
14,723		14,723	13,012		13,012
14,542		14,542	11,635		11,635
13,347		13,347	17,614		17,614
11,845		11,845	12,447		12,447
11,755		11,755	13,173		13,173
8,374		8,374	4,045		4,045
8,292		8,292	2,113		2,113
6,378		6,378	511		511
6,291		6,291	4,087		4,087
6,172		6,172	3,136		3,136
6,067		6,067	4,120		4,120
5,805		5,805	4,411		4,411
3,657		3,657			—
3,435		3,435	8,598		8,598
3,250		3,250	2,971		2,971
3,127		3,127	19,288		19,288
1,582		1,582	3,982		3,982
1,344		1,344			—
1,008		1,008	875		875
874		874	2,638		2,638
658		658	1,365		1,365
		—	1,000		1,000
3,155		3,155	601		601
501,198		501,198	462,682		462,682
2,532		2,532	(10,080)		(10,080)
629		629	16,552		16,552
3,161		3,161	6,472		6,472
104,480	\$150,000	254,480	98,008	\$150,000	248,008
40,000	(40,000)	—			—
<b>\$147,641</b>	<b>\$110,000</b>	<b>\$257,641</b>	<b>\$104,480</b>	<b>\$150,000</b>	<b>\$254,480</b>

## Catholic Giving Subject of Wednesday General Session

“Why Catholics Don’t Give ... and What Can Be Done About It” is both the title of a new book and the subject of the general conference session to be held on Wednesday, October 3 from 10:00 a.m. to 11:00 a.m. The book’s author, **Charles E. Zech, Ph.D.** will be in St. Louis to make this presentation.

Dr. Zech is Professor of Economics in the Department of Economics at Villanova University (PA). His areas of expertise include the economics of business strategy and the economics of religious organizations. His formal education includes a Bachelor of Arts degree from St. Thomas University (MN), Master of Arts and Doctor of Philosophy degrees from Notre Dame University (IN). The subject of his doctoral dissertation was “Regressivity and the Property Tax: Alleviation and Tradeoffs.”

During his professional career, Dr. Zech has been an instructor at Notre Dame University and assistant professor at

Benedictine College. Since 1974 he has held various positions at Villanova University culminating in his position of Professor of Economics, in which department he served as chair from 1984 – 91. He has been honored a number of times, in 1978 as the Distinguished Undergraduate Teacher by the Christian and Mary Lindback Foundation. In 1990 he received the Villanova Outstanding Faculty Research Award.

Dr. Zech is currently an Archdiocese of Philadelphia consultant charged with developing a method for analyzing and interpreting parish registration and collection trends and their impact on pastoral planning. Earlier he had been a parish consultant assisting eight Catholic parishes in the development and implementation of five-year strategic plans. Currently he is doing additional parish consulting through Catholic Stewardship Consultants who assist Catholic parishes in developing programs to institute a stewardship



*Charles E. Zech, Ph.D.*  
Villanova University, Villanova, PA

approach to their fundraising activities.

In recent years Professor Zech has completed three major funded research projects which included “Faculty Development and Faculty Connectedness in American Catholic Colleges and Universities;” “Augmenting the American Congregational Giving Study: Specific Issues in Religious Contributions;” and “Influences on Religious Giving in Five Denominations.” The latter two projects were funded by The Lilly Endowment.



### *The Mississippi Queen*

The Mississippi Queen riverboat offers tours on the river in the grand tradition of the 1800s.

(Photo courtesy of the St. Louis Convention & Visitors Commission)

## Father Kennedy Returns for Monday General Session

Guided by the very successful double Monday morning general session at the 2000 conference in Washington, the DFMC Board of Directors has invited **Reverend Robert T. Kennedy, J.D., J.U.D.** Associate Professor of Canon Law, The Catholic University of America, Washington D.C., to present a similarly structured session entitled “**The Law of the Church and Diocesan Fiscal Management**” Monday morning, October 1 from 8:30 a.m. to 11:00 a.m. Mission Management and Trust Company will host a break from 9:30 a.m. to 10:00 a.m.

Father Kennedy will highlight the fundamentals of the law of the Church regarding the acquisition, ownership, use, administration, and alienation of diocesan property. He will include the concept of juridic personality, laws regarding ecclesiastical taxes, gifts, ordinary and extraordinary administration, alienation and related transactions. It is expected that this presentation will not only be well received, but will raise many practical questions in the minds of the audience. These questions will be addressed as time allows at the end of the session.

Born in Boston, Father Robert T. Kennedy, J.D., J.U.D., is a priest of the Archdiocese of New York who currently serves as Associate Professor of Canon Law at The Catholic University of America. Father Kennedy received his undergraduate degree from Holy Cross College (Worcester MA) and his law degree from Harvard Law School (Cambridge MA). After clerking for the Honorable Charles Fahy on the United States Court of Appeals in Washington, D.C., he entered St. Joseph’s Seminary in Dunwoodie, New York and was ordained to the priesthood in 1959. Father Kennedy received a Doctorate of Canon and Civil Law from the Pontifical Lateran University in Rome.

Kennedy has served as vice chancellor of the Archdiocese of New York, associate chaplain of the United States Military Academy at West Point, professor at St. Joseph Seminary, and visiting professor at New York University Law School and Princeton Theological Seminary. Father Kennedy is past chairman of the Department of Canon Law at Catholic University of America and past president of the Canon Law Society of America. He was a member of the Papal Commission for the Development of Administrative Law in the Church.

Father Kennedy received the Canon Law Society’s highest award for distinguished service to the canonical community. He is also the recipient of the rarely given Prestigious Award of The National Association of Catholic Chaplains. Additionally Father Kennedy was a member of the Papal Commission for the Revision of The Code of Canon Law.

A regular speaker internationally at conferences of professional groups, Father Kennedy has addressed the National Conference of Catholic Bishops, The National Federation of Priests’ Councils, The National Association of Diocesan Attorneys, The National Association of Catholic Chaplains, The Canon Law Society of America, The Canadian Canon Law Society and The Canon Law Society of Great Britain and Ireland.

## Copyright Laws

*Continued from Page 7*

### 19. What are the penalties for making unauthorized copies of copyrighted music?

Embarrassment is the first. Additionally, the law provides for the owner of a copyright to recover damages for unauthorized use of copyrighted music. These damages include the profits of the infringer and statutory damages ranging from not less than \$500 to not more than \$100,000 per infringement. In addition, prison terms are provided for willful (deliberate, with knowledge that it is wrong) and commercial infringement. Churches, schools and not-for-profit organizations can be infringers, too.

### 20. What about photocopiers who don’t get caught?

Professional musicians in most schools and churches know the reasons for the law and therefore would not derive satisfaction from doing something against it. Such action forces the price of legal editions higher. Perpetrators risk dishonor from professional colleagues who understand the law. They also risk fines and jail sentences if taken to court.

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## Postlude

*Plainly stated, making unauthorized copies of copyrighted material is strictly illegal. However, music publishers desire to have their songs used as much as possible, so in many cases permission can be obtained, but you must contact the copyright owner prior to use or duplication.*

*By the way, Music Publishers’ Association, OCP Publications, and New Dawn Music prepared these guidelines. No copyright is claimed for these guidelines. Readers are encouraged to reproduce them in order to assure their widest possible circulation.*

## Creating a Comprehensive Marketing Program



**Calvin H. Stoney**

*Gonser Gerber Tinker Stuhr Naperville, IL*

Marketing is a concept often misunderstood by non-profit leaders. The purpose of this article is to clarify the concept of marketing and provide guidance to the important task of creating integrated and comprehensive marketing programs for charitable and not-for-profit organizations.

In the second issue of our Bulletin dating back to November 1953, Tom Gonser and Jay Gerber stated “integration is the first need in presenting the organization’s package. An integrated view of where an organization wishes to go and what it wants to do will give meaning to every part of the development program.... In order to design the overall “package” the professional staff, administrators, and public relations department must get together to see what it is that they wish to present. There is enough talent in most not-for-profit organizations, given proper direction, to do this job successfully.”

The basic truths that Tom Gonser and Jay Gerber promoted in the early 1950’s are still cornerstones of effective marketing programs today. In recent years not-for-profit officials have been bombarded with the concept of integrated marketing. This growing emphasis is justified and essential if organizations desire to differentiate their strengths and communicate their leading attributes. In a time of

increasing competition for financial resources, having an effective marketing program that builds brand identity and strengthens an organization’s reputation is central to long-term success.

### Marketing - A Comprehensive Concept

Organizations often struggle with the task of positioning themselves in the marketplace with the variety of audiences they seek to serve. Many are the reasons why this task presents challenges. Some find the lack of staff expertise or inadequate financial resources as the barriers to making their organizations better known or better understood. Others find that their organization lacks a clear understanding of the mission, vision and goals, thereby, making it difficult to project consistent images and messages to external constituent groups. More often than not, the primary challenge organizations face is a lack of internal understanding of how to develop and implement a comprehensive marketing program.

Even today, many people interpret “marketing” to be synonymous with “promotion”. Others define marketing in a more narrow sense, believing it to be a focus primarily on constituent research. To be effective in efforts to become better known, understood, and appreciated one thing is certain, a common definition and understanding of organizational marketing must be developed and agreed upon broadly by members of the organization.

Phillip Kotler, renowned author and professor at the Kellogg Management School at Northwestern University, has written books and articles on the effective marketing of non-profit organizations. In his book, *Marketing for Non-Profit Organizations* he emphasizes the importance of the four P’s of marketing: prod-

uct, pricing, promotion and place. These four key elements help a not-for-profit organization understand the breadth and scope of the marketing principle. In addition, Kotler believes that, “Marketing the non-profit organization involves STP – segmentation, targeting and positioning.” Following Kotler’s two perspectives of marketing, an organizational definition for marketing can be developed and the desired outcomes of an organizational marketing plan can be achieved.

### Adopt a Definition for Marketing - Create Organization Wide Understanding of the Concept

Not-for-profit and charitable organizations must create their own definition of marketing. Such a definition will help administrators, staff and external parties clarify the elements to be incorporated in the marketing plan. Our firm encourages organizations to consider the following definition for marketing:

Marketing involves the constituent research, services and program development, pricing, constituent programs, events, publications, advertising and media that enhances the quality, understanding, awareness, appreciation, and image of the organization in the minds of the constituents it seeks to serve, the constituents it seeks to relate, and the general public. With this broad definition of marketing in mind not-for-profit and charitable organizations are poised to develop a marketing plan that will enhance their reputations and images locally, regionally, and nationally. Once organizations clarify this definition of marketing and implement an integrated marketing plan, chances for increased success are enhanced exponentially.

*Continued on next page*



## The Foundation of a Strong Marketing Program - A Commitment to Quality

Excellent services and programs are vital to all marketing efforts. Without strong programs, outstanding employee performance, and effective services, marketing efforts will be shallow and likely unsuccessful. Organizations must focus on the enhancement of their programs and core services. When the product is strong and of high quality, marketing efforts have a foundation for success. Leaders must keep the focus on enhancing program offerings at all times.

In addition, the recruitment and retention of top administrators and staff to deliver the best possible services must be a high priority. Organizations that have a large proportion of their employee base who are inexperienced or part-time, run the risk of earning a weak reputation for excellence. No marketing effort that is credible and ethical, can or should portray an organization as better than it actually is. The continuing priority of making your organization better for those you serve and always seeking ways to enhance the professional staff are the foundations to a successful marketing program.

## Marketing Requires Team Effort – Define Player Roles Across the Organization

Marketing, is an organization-wide concept, which must be understood and adopted as a priority. Staff, administrators and boards cannot afford to ignore the important role integrated marketing plays in the competitive non-profit marketplace. All persons involved with the organization must understand their roles and help market the organization at every opportunity, planned and spontaneous. The chief financial officer is a key person in this regard.

Not-for-profit and charitable organizations where the staff and administration understand their individual roles in marketing are almost always among the most

successful organizations. Results occur when each member of the organizational team knows his or her part in the integrated marketing plan.

## Developing Brand Identity – A Key Outcome of Good Marketing

“Brand recognition” and top of mind awareness, “toma,” are vital for not-for-profit organizations. An organization must be clear about what it wants its various constituent groups and the general public to know. Consistent answers to the question, “What do you think of when you hear the words – ABC Organization?” are critical. Perceptions are reality in the minds of clients, patrons, potential major donors and the many publics you serve. Therefore, developing a particular set of characteristics, traits, or attributes that uniquely identify your organization from other organizations is important to developing a brand identity.

Creating organizational identity involves intentional efforts of assessing the strengths and weaknesses in light of its mission, vision and goals. Stating the preferred “brand identity” and “top of mind awareness” that an organization would like for itself is an important early step in creating a successful marketing program as well. Having research available that helps the not-for-profit understand its current image and position in the marketplace, is a pre-requisite for the “branding” process.

## Valuing the Views of Others - The Importance of Research

A not-for-profit must collect and analyze data regarding the perceptions and attitudes from those it seeks to serve or has served. Constituent research is a cornerstone of successful marketing efforts. When research tools are carefully and properly designed and implemented, the time, effort and money spent to collect constituent data can be extremely valuable to the marketing program. Utilizing research as a guide to marketing efforts

helps prevent costly mistakes and focuses the marketing program on real rather than perceived issues.

Does your organization know what perceptions, images and attitudes are held by the variety of constituents you seek to serve and influence? If not, how can you develop a marketing program to reinforce or change their perceptions and attitudes?

The need for market research at many organizations is alarmingly high. The more leaders know about the attitudes and perceptions of those they seek to serve, the better able they are to respond to their concerns and influence their impressions, perceptions or misperceptions. It is not enough to operate on intuition or make decisions based on anecdotal data. In this age of information and data-driven decisions, research is your ally, an important tool you must utilize.

## The Marketing Plan - It Must Be Written and Shared Internally

As non-profit organizations develop marketing programs they must keep in mind the comprehensive nature of such programs. We recommend organizations create a detailed, written plan that identifies and lists all the current and intended marketing efforts and the strategies they intend to employ. Such an inventory will include strategies for product development, membership efforts, publications, advertisements, events, constituent programs, pricing, web, target markets, etc. Once this plan is complete, share it with members of the staff and board in an effort to promote understanding and joint ownership for the tasks outlined in the plan. More importantly, involve all constituent representatives in the creation of the plan in an effort to build broad based ownership for the eventual plan.

Through sharing and discussions of the plan the organization builds common understanding and commitment to its implementation. To achieve the benefits

*Continued on page 19*

## Maryland Court Upholds Tax Exemption For Entire Church Building Site, Not Merely the “Development Envelope”



The Court of Appeals of Maryland has sustained administrative and lower court decisions that an entire 27-acre parcel on which a church had been constructed was eligible for a tax exemption for property used actually and exclusively for public religious worship. The property in question is comprised of a 7.5 acre “development envelope,” that is, the land on which the church buildings were permitted to be constructed (the tax exemption for which had not been contested), another 3 acre exempted parcel, and a 16.5 acre parcel required to be kept as open space as a result of the zoning board decision which permitted the construction of the church in the first place. The latter parcel was the focus of the litigation, having been found to be eligible for a tax exemption for “actual and exclusive” religious worship sites as prescribed in Maryland Code § 7-204.

The Property Tax Assessment Appeals Board agreed to extend the exemption to that acreage, and the County Supervisor of Assessments appealed to the Maryland Tax Court. It affirmed the Board’s decision and found that because the entire 27-acre parcel was entitled to be treated as a single “package,” the entire parcel was entitled to exemption. The Circuit Court for Baltimore County affirmed. This appeal followed.

The government argued, in sum, that while the 16.5 acres be kept as open space makes it a “non-use,” and so not “actually and exclusively” used for the exempt religious purpose. It argued the exemption was not applicable and that the 16.5 acres – though not the 7.5 acre “development envelope” – was subject to taxation. The government’s argument on

appeal was that there was no evidence that any activities at all, let alone public religious worship, occurred on the 16.5 acres, which simply provided natural surroundings for the church buildings. The mere mandatory non-use, or at least non-development, of the 16.5 acres did not constitute active public worship, the government argued, a facially attractive argument.

The Archbishop of Baltimore argued that, to the contrary, the 16.5 acres have no other use but to support the active worship activities of the Church, since that property is zoned as open space and cannot be otherwise developed for at least 60 years. As such, the land is actually and exclusively used for public religious worship, thus entitling it to § 7-204’s exemption.

The court’s decision in favor of the exemption turned fundamentally on the view that the entire parcel must be viewed “as a whole, an entire package or fabric,” a position supported by testimony in the record concerning the property’s use as part of the larger worship space.

The court described the cases interpreting § 7-204 as meaning that substantive uses other than as a church use (i.e., not simply a “non-use”) must be demonstrated before the 16.5 acres could be demarcated from the church site, and so found subject to taxation. It concluded that “the cases involving interpretation of § 7-204 clearly involve property upon which a use other than, or in addition to, public worship occurs; they are concerned with exempted land being put to uses other than the charitable, educational, or religious use which gave rise to the exemption.” No such use was shown here.

Three judges of the seven-judge court dissented. They took the position that because the land was not used for any particular purpose, and could be used either as open land or as agricultural property pursuant to the zoning exception the church had been granted, it could not be said that the property would be “actually and exclusively” used for public religious worship and nothing else. The dissent focused on record evidence which was claimed to be devoid of any references to religious uses, of the 16.5 acres, or any uses at all. In the dissent’s view, the majority as well as the lower courts had applied the wrong standard in asking whether any non-church use of the property had occurred – it concededly had not – rather than on its view of what § 7-204 actually meant, which was whether an affirmative religious use had been shown. Ancillary, and even necessary, usage of adjoining property as a buffer zone would not, in the dissent’s view, be sufficient for application of § 7-204. Rather, the dissent opined that the church should have been required to affirmatively demonstrate the actual religious use to which the 16.5 acres were put, and that it was not.

In any event, a four-judge majority has sustained the application of the tax exemption to the entire 27-acre parcel, a significant tax benefit to the Church and potentially useful precedent in future cases.

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*See: Supervisor of Assessment of Baltimore County v. William Cardinal Keeler, Archbishop of Baltimore, No. 85 (Md. App. Jan. 4, 2001).*

## Marketing Programs

*Continued from Page 17*

of an “integrated marketing plan” diocesan stakeholders must understand the marketing plan and the role they play in making it work. The intended outcome of a carefully written marketing plan is a highly focused effort that achieves the goals and objectives of the diocese in support of the strategic plan initiatives.

### Leadership Must See the Big Picture – Build a Marketing Team

Marketing plans can only be successful if those leading the marketing efforts see the big picture. The head of the marketing team should be someone who serves the organization at a senior administrative level. This could be the chief development officer, chief public relations officer, or chief communications officer. The person who leads the effort must be experienced, respected and have the administrative authority to keep the marketing efforts moving.

Utilizing a marketing team is central to the success of integrated marketing efforts. Creating a marketing team takes time and effort on the part of many key officials but the long-term and short-term benefits outweigh the costs of staying de-centralized. Marketing teams typically involve key personnel from development, public relations, community relations, and other appropriate departments. Involving marketing professionals, as volunteers or as consultants, can also add value to these efforts. If you involve external persons make sure the organization is clear about what it hopes to achieve with such a marketing group.

### A Comprehensive Marketing Plan - Essential for Long Term Success

Developing a comprehensive and integrated marketing plan can take an organization to new heights of public understanding and recognition. We urge not-for-profit leaders to move without hesitation in the direction of integrated marketing. Doing so will result in a clearer differentiation of organizational strengths, an enhanced public image, and a broader appreciation for the organization's contributions to the well being, health, or culture of the community.

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*Gonser Gerber Tinker Stuhr LLP is a consulting firm dedicated to helping educational, healthcare, religious, human service, cultural and other not-for-profit organizations clarify their aims, build their leadership and attract the human and financial resources they need to achieve their highest destiny. Gonser Gerber Tinker Stuhr has published the Bulletin on Public Relations and Development for nearly fifty years as a service to the non-profit world. The preceding article is the fifth in a series about the development process. Because the development process is crucial to the fiscal area, the articles are designed for the chief financial officer of dioceses. Frequently the chief financial officer will ask the question, “What does marketing have to do with my area of responsibility?” In this article we stress the idea that all facets of the diocese must be integrated to achieve the end result of raising new resources.*

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## Court Upholds Statute Giving Religious Groups a Right to Exempt Themselves from Landmarking Laws



The Supreme Court of California has sustained a provision of California's landmark protection statute which allows religiously-affiliated (but not secular) non-profit groups to exempt themselves from the application of that statute if they determine that they will suffer economic hardships from the law's application, or will be prevented from making appropriate use of their property in furtherance of their religious missions. In the face of an Establishment Clause challenge, the state supreme court agreed with a court of appeals that the state was not thereby endorsing religion, but rather was simply deciding not to infringe upon the rights of religious property owners to use their facilities to advance their own purposes, not the government's purposes.

The state supreme court applied what it conceived to be the appropriate "Lemon" test. It found the "secular purpose" prong of the test fulfilled because the exception in question was designed to prevent a potential Free Exercise Clause violation, since the landmarking statute's requirements, in terms of costs and restrictions on use that otherwise would apply to a religious property owner, might clearly burden a religious entity's ability to exercise its religious principles. Under *Corporation of Presiding Bishop v. Amos*, 483 U.S. 327 (1987), it is a permissible secular legislative purpose to alleviate significant governmental interference with a religious entity's ability to define and implement its religious goals.

The court also decided that a religious exemption from a generally applicable law was permissible if the law created a potential burden on free exercise, as well as an actual or previously-existing burden. Legislatively created exemptions are permissible if the legislature has reason to believe the law could burden free exercise, because legislative bodies have "broad authority to determine that accommodation is appropriate," even in circumstances where a court itself might not have been required to exempt the religious entity from an application of law. Here, the California legislature could reasonably believe that landmarking restrictions could burden religious groups' ability to carry out their religious missions.

The plaintiffs also argued that the court of appeals had erred in finding that the exemption simply made it easier for religious entities to advance their own purposes, as opposed to governmentally advancing religion. They argued that the exemption gave religious groups important economic advantages, at the expense of nearby property owners, thus having the primary effect of "advancing religion." This would violate the second prong of the *Lemon* test. The California Supreme Court disagreed, saying that the exemption only permitted religious organizations to use their property as they see fit, rather than subsidizing religious groups at the expense of others. The court wrote: "That the [religious organization] owner may enjoy an economic advantage over secular owners of landmark properties is not relevant. Unlike an exemption from taxes [as in *Texas Monthly v. Bullock*, 489 U.S. 1 (1989)], an exemption from landmark does not create a subsidy for religious activity by forcing other property owners to be vicarious donors or, since it does no more than permit use of the property as it was before landmark designation, convey any message of governmental endorsement of religion."

The California Supreme Court also rejected that appellant's claims that the exemption "excessively entangled" the government with religion. Here, the state has not entangled itself with religious entities though it permitted them to exempt themselves from the landmarking rules, because the government was not thereby delegating any governmental authority to the religious groups, unlike, for example, *Larking v. Grendel's Den*, 459 U.S. 116 (1982). And while religious entities wanting to exempt themselves must claim hardship in a public forum, this is not a "governmental forum" but a public hearing at which the owner's claim of hardship may be stated. The government itself does not make, or withhold, decisions about the property of these exemption claims. This has the effect of disentangling government from religion, allowing the religious entity to use its property as it could have prior to the government's imposition of additional restrictions by way of the landmarking legislation.

The same conclusions were reached in relation to claimed California state constitutional

violations. The court concluded that no provision of the federal or state constitutions were contravened by the legislature's creation of exemption from landmark preservation laws, for religious entities.

**The Dissents.** Two vigorous dissents were filed. The first, authorized by Justice Stanley Mosk, would have concluded that this legislative scheme violated the California constitution by granting to religious organizations an "impermissible preference." By conferring on religious organizations alone a unilateral right to exempt themselves from rules otherwise applicable to all property owners, the legislature had violated at least the state's version of the Establishment Clause, which Justice Mosk described as "more protective of the principle of church-state separation than the [federal] First Amendment."

Justice Mosk would have found the enactment in question to violate each of the three prongs of the *Lemon* test, and that it demonstrates favoritism toward religion, generally, that is prohibited under the state constitution. In Justice Mosk's words, this is "an easy case" requiring invalidation of the statutes.

Two other justices dissented in a somewhat more nuanced way. They recognized that not "every exemption for a religious landmark would properly be regarded as an unconstitutional forced subsidy of religion," but they would have concluded that the legislature had actually granted, solely to religious organizations, a "unique and unjustified power of self-exemption." These justices would have held that these exemptions "go far beyond a reasonable accommodation of the exercise of religion," but rather "grant a significant, unjustified and preferential benefit to religious organizations" alone, and so violate the neutrality toward religion required of government.

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*See: East Bay Asian Local Development Corp. v. California, No. S077396 (Cal. Dec. 21, 2000).*

## USCC Comments of HHS Privacy Regulations



On March 22, 2001, the USCC filed comments of the federal Standards of Privacy of Individually Identifiable Health Information. The privacy regulations had been issued by the U.S. Department of Health and Human Services (“HHS”) in the waning days of the Clinton Administration, but the Bush Administration delayed implementation of the regulations and reopened the comment period.

USCC raised three issues in its comments.

The regulations would create what is, in effect, a presumption against giving parents access to medical information about their minor children in certain circumstances. Parents are generally entitled to that information and need it to care for their children and to make responsible decisions about their health care. Accordingly, the USCC urged the government to modify the regulations to provide that nothing in the regulations shall prevent any person from providing a parent, guardian, or person in loco parentis with any health information concerning his or her minor child.

Absent patient consent, the regulations generally bar the disclosure of health information to relatives and others in some circumstances

where disclosure may prevent harm – even deadly harm – to the patient or others. The regulations, to their credit, do permit disclosure if there is a “serious and imminent” threat to the health or safety of others. But by the time a threat becomes “serious and imminent,” disclosure may be too late to prevent harm, as illustrated by recurring headlines about violence in our Nation’s schools and workplaces. Thus, if a child or adult has suicidal or homicidal thoughts, disclosure to parents (in the case of a child), relatives, or others may be appropriate to avert or lessen the possibility of harm even before the threat becomes – indeed, precisely so that the threat does not become – “serious and imminent.” For these reasons, USCC urged the government to amend the regulations so that disclosure of medical information is not barred when the covered entity reasonably believes that the patient may harm himself/herself or others.

We commended HHS for permitting hospitals and other health care facilities to share with clergy so-called “directory” information (listing patients by name, location within the facility, religious affiliation, and a general description of their medical condition). We urged HHS, how-

ever, to make two adjustments. Because “clergy” is not defined in the regulations and might be taken to refer only to “ordained” ministers, we asked HHS to clarify in the regulations that “clergy” refers to any minister designated by the Church, whether ordained or not. This would be especially important, we explained, for the Catholic practice of allowing lay and religious ministers to visit, offer Communion, and otherwise minister to persons who are hospitalized or placed in a nursing home or other health care facility. Second, we noted that if there is to be any presumption in cases of incapacity or emergency medical care, it should operate in favor if disclosure of directory information to clergy. We urged HHS to modify the rule in such cases to permit disclosure to clergy unless disclosure would be inconsistent with the individual’s stated wishes.

A complete copy of the comments is available from the Office of General Counsel upon request.

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*See: Standards for Privacy of Individually Identifiable Health Information, 66 Fed. Reg. 12738 (Feb. 28, 2001).*

### *St. Louis Blues*

The Blues were born here in St. Louis and they wail nightly at clubs and pubs throughout St. Louis.

(Photo courtesy of the St. Louis Convention & Visitors Commission)



## Catholic Charities of Sacramento Wins Interim Relief in “Conscience Clause” Litigation



Catholic Charities of Sacramento, Inc. (“CCS”), has won an important, if interim, victory in its litigation to require California state laws mandating the provision of prescription drug insurance coverage for employees, to provide for a “conscience clause” so the Catholic and other religious entities need not support the provision of contraception, or other coverages for measures they deem religiously offensive.

Specifically, the California Court of Appeal for the Third Appellate District has ordered that an Alternative Writ of Mandate issue, requiring the State of California to show cause why the court should not issue an order granting CCS the injunctive relief it sought in the suit.

CCS sued in the summer of 2000, complaining of certain provisions of newly-enacted California law that would essentially require CCS to pay for prescription contraceptive benefits. The coverage of the statutes in question would arguably also have been broad enough to require CCS to provide coverage for RU-486, the so-called “morning after pill.” CCS cannot fund such insurance coverage because of the Church’s position regarding abortion and artificial contraception. But at the same time, CCS offers extensive health benefits, including a prescription drug benefit, to all of its full-time employees. CCS argued that, consistent with Church social justice teachings, it has a religious obligation to provide just wages and benefits to its employees and so could not simply stop providing insurance coverage. The language of the statutes would have provided a “conscience clause” exception only to certain narrowly-defined “religious employers,” which would not have included CCS. CCS argued that it was clear from the relevant

legislative history that the sponsors of the legislation were trying to exclude specific Catholic institutions from the exemption provisions.

CCS sued, and moved for a preliminary injunction in August 2000, arguing that the contraceptive coverage mandate infringes on CCS’s free exercise rights under the California and United States Constitutions, and does not advance a sufficiently compelling state interest to justify that infringement. It also argued that the legislative “gerrymandering” of the exemption, to include some religious employers but deliberately exclude others, violated the Establishment Clause. At the trial court level CCS was denied injunction relief without any substantive opinion.

Because CCS argued it would be irreparably harmed if it were required to comply with the prescription coverage legislation as written, that is, requiring CCS to pay for coverage for contraceptives, and it had no other plain, speedy or adequate remedy, it petitioned the appellate court for a Writ of Mandate.

An Alternative Writ of Mandate was issued in December as a result of 3-0 panel decision from the appeals court, giving CCS extraordinary relief. The issue has now been fully briefed to the appeals court, to include the submission of 45 briefs amicus curiae. Whether the court will ultimately decide in favor of CCS remains to be seen, but this is an extremely favorable development.

*See: Catholic Charities of Sacramento, Inc. v. Superior Court of Sacramento County, No. C037025 (Cal. App. 3d Dist., Dec. 12, 2000).*

## Diocese Entitled to Summary Judgment in Case Arising out of Priest’s Sexual Misconduct with Couselee



Charles Payne and his wife went to their parish priest for marriage counseling. After Charles allegedly discovered a 45-day adulterous relationship between his wife and the priest, the Paynes divorced, and the priest left ministry.

Charles sued the priest and the diocese for intentional infliction of emotional distress. He alleged that as a result of the adulterous affair, he suffered a nervous breakdown, lost his religion, lost his house, and lost his job as well as his wife. The trial court granted summary judgment to both defendants on the ground that adultery can never reach the stage of outrageous conduct and that the claim was at bottom one for interference with marital relations or alienation of spousal affections which Kentucky abolished by judicial decision in 1992.

The Kentucky Court of Appeals affirmed the grant of summary judgment in favor of the diocese. As to the priest, it reversed, finding there was evidence of a special relationship which dis-

tinguished his conduct from that of an ordinary adulterer, and that a jury question was presented whether his conduct was outrageous. After accepting discretionary review, the Supreme Court of Kentucky affirmed the decision of the Court of Appeals.

In its discussion of the priest’s liability, the Supreme Court placed great emphasis on the existence of a special or confidential relationship between Payne and his priest, and evidence that the priest was aware the married couple was vulnerable. “Payne has presented sufficient evidence from which a jury could conclude that he had a special relationship with his priest or marriage counselor and that his special relationship was violated in an outrageous fashion so as to cause him severe emotional distress.” Ordinary adultery will not give rise to a claim of emotional distress in Kentucky, but it is the “concept of special relationship that distinguishes this factual situation” from one involving ordinary adultery. “The use of a confidential relationship

between Payne and his priest counselor is the heart of this lawsuit.”

The Supreme Court, however, rejected Payne’s claim of vicarious liability against the diocese as “absurd.” “To accept such a theory would in effect require the diocese to become an absolute insurer for the behavior of anyone who was in the priesthood and would result in strict liability on the part of the diocese for any actionable wrong involving a parishioner. We must conclude that such an argument is absurd. Certainly, the scope of employment of a priest could include marriage counseling, but it clearly does not include adultery.”

The Supreme Court also found no basis for a claim of independent negligence on the part of the diocese. There was no evidence that the priest had a history of sexual misconduct, or that the diocese knew he might conceivably engage in such conduct.

*See: Osborne v. Payne, 31 S.W.3d 911 (Ky. 2000).*

## Extension of Church Plan Relief from Nondiscrimination Rules



IRS has extended the effective date of the regulation under section 401(a)(4), 401(a)(5), 401(1), and 414(s) of the Internal Revenue Code for section 414(e) church plans that have not made the section 410(d) election to be covered by ERISA until the first day of the first plan year beginning on or after January 1, 2002.

Section 414(e)(1) of the Code provides generally that the term "church plan" means a plan established and maintained for its employees by a church of convention or association of churches exempt from tax under section 501. Section 410(d) permits a church plan to elect to have certain Code provisions relating to participation, vesting and funding, etc. apply as if they contained no exclusion for church plans. By making the section 410(d) election, a church would be subject to ERISA provisions relating to participation, vesting, funding, etc. Churches that do not make the section 410(d) election are referred to as "nonelecting plans."

Pursuant to Notice 98-39, 1998-2 C.B. 205, the regulations under section 401(a)(4), 401(a)(5), 401(1) and 414(s) of the Code were to have applied to non-electing church plans in plan years beginning on or after January 1, 2001. Prior to that date, non-electing church plans were to operate in accordance with a reasonable good faith interpretation of these Code provisions. The current notice extends the effective date for one year.

*See: IRS Notice 2001-9, 2001-4 I.R.B. 375 (January 22, 2001).*

## Membership Increases Since February

Five additional dioceses have paid their annual DFMC dues since the February report to membership. This raises the total membership for 2001 to 181. Dioceses who have not yet sent membership dues to the National Office still have time to do so before the annual conference.

The five additional member (arch) dioceses are:

[Gallup NM](#)

[Laredo TX](#)

[Lincoln NE](#)

[New York NY](#)

[Nassau, Bahamas](#)

As we support each other in our financial ministry, we welcome our additional members.

**Please note, our correct website address is:**

[www.dfmconf.org](http://www.dfmconf.org)

### What would you like to see in The Herald?

Members are encouraged to submit items as well as articles for consideration in *The Herald*. Notices of Position Availability are held in confidence until publication date.

#### The Herald Publication Schedule

DFMC Herald will accept notices and articles for future issues according to the following schedule:

Deadline Date		Publication Date
July 16	<i>Summer Issue</i>	August 14
October 15	<i>Fall Issue</i>	November 12
January 18	<i>Winter Issue</i>	February 15
April 12	<i>Spring Issue</i>	May 10

We would appreciate your comments and input on items for future issues. Please mail to:

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### Address Update

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# Association Meetings

## National Association of Church Personnel Administrators (NACPA)

November 8, 2001 November 11, 2001	Denver, CO	Hyatt Regency Denver
November 7, 2002 November 10, 2002	Orlando, FL	Disney's Coronado Springs Resort
October 26, 2003 October 29, 2003	Mesa, AZ	Sheraton Mesa Hotel & Convention Center

## Nat'l Assoc. for Treasurers of Religious Institutions (NATRI)

October 31, 2001 November 3, 2001	Milwaukee, WI	Midwest Exposition Conference Center
November 18, 2002 November 24, 2002	Tampa, FL	To Be Announced

## International Catholic Stewardship Conference (ICSC)

September 16, 2001 September 19, 2001	San Diego, CA	Marriott Hotel and Marina
October 27, 2002 October 30, 2002	Toronto, Ontario Canada	Sheraton Centre Hotel
October 5, 2003 October 8, 2003	Chicago, IL	Hyatt Regency Hotel
September 12, 2004 September 15, 2004	New Orleans, LA	Hyatt Regency Hotel
October 2, 2005 October 5, 2005	San Francisco, CA	Marriott San Francisco Downtown
October 1, 2006 October 4, 2006	Boston, MA	Hynes Convention Center

## Legal Resource Center for Religious (LRCR)

April 4, 2002 April 7, 2002	Greensboro, SC	Holiday Inn Four Seasons/ Jos. S. Koury Conv. Center
April 24, 2003 April 27, 2003	Milwaukee, WI	Four Points Milwaukee Airport

## Canon Law Society of America (CLSA)

October 7, 2001 October 12, 2001	Albuquerque, NM	Hyatt Regency Albuquerque
October 14, 2002 October 17, 2002	Cincinnati, OH	Omni Netherland Plaza
October 13, 2003 October 16, 2003	Portland, OR	Double Tree
October 2004 October 2005 October 2006 October 2007 October 2008 October 2009	Pittsburgh, PA Rome, Italy Dallas, TX Las Vegas, NV Philadelphia, PA Indianapolis, IN	Hilton To Be Announced To Be Announced To Be Announced To Be Announced To Be Announced

## National Federation of Priests' Councils (NFPC)

April 15, 2002 April 19, 2002	Toronto, Ontario Canada	Weston Harbour Castle
2003 2004	Kansas City, KS Atlanta, GA	To Be Announced To Be Announced

## Conference for Catholic Facility Management (CCFM)

May 19, 2001 May 23, 2001	Indianapolis, IN	Radisson
2002 2003 2004 2005	Tampa, FL San Diego, CA St. Petersburg, FL New York / New Jersey	Hilton To Be Announced To Be Announced To Be Announced

## Diocesan Information Systems Conference (DISC)

June 6, 2001 June 8, 2001	London, Ontario Canada	Four Points Sheraton Conference Center
2002 2003	St. Paul, MN St. Petersburg, FL	Airport Hilton To Be Announced



## Diocesan Fiscal Management Conference

National Office • P.O. Box 199 • Waterville, OH 43566-0199