



ANNUAL REPORT

CHANCERY OFFICE OF THE DIOCESE OF JACKSON

Dear Friends in Christ,

I am grateful to the leadership in the Chancery, who have crafted this thorough and readable report that provides an overview of the faithful stewardship of all who labor at the center of our diocese. I can assure you that the head of each department is committed to the ideals of collaboration, cooperation and communication that create a culture of transparency and accountability. Working together as a team they are much more capable of fulfilling their mission to serve diocesan ministries in collaboration with our dedicated ordained, religious and lay staff and volunteers over 65 counties. All together we strive to build up the Body of Christ, to go and make disciples, and to build up the Kingdom of God, one of justice and peace.

I would be remiss if I did not mention that the timeframe covered by this annual report occurred throughout the pandemic which had curtailed normal travel and interactions. However, it did not dampen the zeal to create new avenues for engagement and encouragement on the part of diocesan leadership. I am so grateful that they are right at home going the extra mile even when they cannot leave the office.

May the God of perseverance and encouragement bless our children and youth, our parents and educators, and our health care workers who continue to face daunting challenges as the pandemic ebbs and flows.

Sincerely yours in Christ,

+Joseph R. Kopacz
Bishop of Jackson

QUICK STATS

Catholic Population	42,746	Adult Baptisms	54
Number of Parishes	72	Received into Full Communion	101
Number of Missions	19	First Eucharist	415
Personnel		Confirmations	236
Active Diocesan Priests	29	Marriages	183
Diocesan Priest Outside Diocese	2	Deaths	379
Retired Priests	20	Catholic Education	
Religious Order	20	High Schools	4
Extern Priests in Diocese	12	Elementary Schools	12
Total Priests	83	Early Learning Centers	3
Permanent Deacons	7	Full-time teachers	360
Brothers	4	Number of students	3,411
Sisters	40	Child Protection	
Seminarians	6	Background checks for Child Protection Program	1,532
Lay Ecclesial Ministers	9	Total Number of Background Checks	17,000+
Sacraments			
Baptisms	576		

FINANCIAL REPORT

CAROLYN CALLAHAN – DIRECTOR, DEPARTMENT OF TEMPORAL AFFAIRS

The full audit report for the Chancery office finances of the Diocese of Jackson are available online at <https://jacksondiocese.org/offices/administration-finance/>. The pie charts included in this report exclude the restricted net asset and related transactions of the proceeds from the Sarullo Estate bequeathed to the diocese, for the sole use and benefit of St. Joseph Catholic Church and Parish, Greenville, that are a required part of the audited financial statements.

Included in the audited financial statements are the Current Fund and Deposit and Loan Fund. The Current Fund represents the services provided to the parishes, schools, and missions by the diocesan bishop and his representatives including the offices of the Bishop, Vicar General, Chancellor, Archives, Communication, Education, Faith Formation, Liturgy, Seminarian Education and Vocations, Stewardship and Development, and Temporal Affairs. The Deposit and Loan fund represents the savings of all parish and school locations and the related investment portfolio. Separate from this report are the income and expenses of Catholic Charities and the Catholic Foundation.

Two main sources of income for the Chancery office are the annual Cathedraticum assessment and the Catholic Service Appeal. The Cathedraticum assessment is currently 10.5% of the annual parish income less certain exemptions for approved capital campaigns and subsidies paid to schools. Income from this annual assessment funds the expenses of the office of the Bishop and his extended administration, retirement and health insurance costs for all

priests, and seminarian education, stipends, and benefits costs.

Personnel salary and benefits, clergy benefits and assistance, and seminarian education represent the major expenses of the administration of the Bishop. Other routine expenses include workshops and conferences held and attended, travel, newspaper printing and distribution costs, and grants awarded to parishes and schools.

Significant functions and improvements within the Temporal Affairs (finance) office for the last three years include but are not limited to:

- Filing 79 Paycheck Protection Plan applications for all parishes and schools within the diocese for a total of \$5,422,000. These funds were distributed to each specific location to offset their individual payroll costs. PPP loans were fully forgiven except for three locations having a combined PPP total of just under \$6,000. Second round PPP applications were filed for five schools and three parishes.
- Consolidation of the Deposit and Loan investment portfolio to minimize risk, contracting with an experienced investment consultant who provides regular and transparent statements, and quarterly review of the portfolio by a separate investment committee.
- Actively involved Finance Council led by a lay expert Chair, advisory to the bishop, including various active committees such as the budget committee, audit committee, and investment committee.
- Collaboration with the federal government

to improve overall best practices regarding ethics, communication, and finances of parishes and the chancery office.

- Strong working relationship with independent audit firm and compliance with GAAP.
- Improved internal financial reporting processes and budget planning.
- Streamlining of procedures using external resources to improve internal controls and processes with fewer department employees.
- Strengthened collaboration with Catholic Charities regarding finances.
- Stabilizing of medical premiums and overall health plan costs by working with newly formed Department of Human Resources to change providers.

Plans for the future include but are not limited to:

- Separately incorporating the Deposit and Loan fund to be administered by a board consisting of the bishop and a selection of priests, lay ecclesial ministers, school principals, and lay parishioner experts.
- Review of the current diocesan lay retirement plan.
- Implementation of Internal Audit program for parishes.
- Creation of School Finances Guide to Best Practices.

Questions regarding diocesan finances may be sent to Carolyn Callahan, Director, Department of Temporal Affairs via email to Cathy Pendleton at cathy.pendleton@jacksondiocese.org.

CATHOLIC DIOCESE of JACKSON



CHANCELLOR MARY WOODWARD

- The Chancellor coordinates archives and records for the Bishop of the Diocese.
- The Chancellor is the official ecclesiastical notary for the bishop; coordinates episcopal diocesan liturgies; and oversees the bishop emeritus' office and household.
- The intricate process for the cause of canonization for Servant of God Sr. Thea Bowman, FSPA, is the responsibility of the Chancellor's office as well.
- Developed and implemented response protocols for all Lighthouse reports
- Assisted in fulfilling compliance requirements for the Deferred Prosecution Agreement with the U.S. Attorney's office
- Facilitated several canonical processes
- Began a digitization project for older annual parish and diocesan reports
- Enrolled in a certificate for records management graduate program to help better organize diocesan data and information
- Mapped out the confirmation schedule in accord with COVID protocols
- Coordinated funeral rites for Bishop Emeritus Joseph N. Latino and Father Brian Kaskie
- Aided with live streaming special events, funerals and Masses with Bishop Kopacz

CATHOLIC EDUCATION EXECUTIVE DIRECTOR OF SCHOOL OPERATIONS KARLA LUKE

- Catherine Cook retired after almost three decades of outstanding service to the Office of Catholic Education in the Diocese of Jackson
- Bishop Kopacz approved the restructuring of the Office of Catholic Education encompassing the positions of Executive Director of School Operations and Director of Curriculum and Development.
- Closing of Holy Family Early Learning Center in Natchez
- Opened the Sisters of Mercy Early Learning Center in Vicksburg welcoming Katie Emfinger as the center director
- Welcomed two new administrators to the Office of Catholic Education: Jessica Carter, Principal and Lead Administrator at Cathedral Catholic School in Natchez and Will Vollar, Principal of St. Patrick School in Meridian.

Class of 2021

- 172 graduates
- Completed 34,668 service hours or an average of 201 per graduate
- Accepted \$5,207,937 in scholarships or an average of \$30,279 per graduate



STEWARDSHIP AND DEVELOPMENT DIRECTOR REBECCA HARRIS

Stewardship Office

- Launched the Stewardship Paths monthly newsletter through Flocknote to provide parishes with stewardship materials that can be shared with parishioners. It includes weekly readings, reflections and other materials on time, talent and generosity.
- Aided the vocations office on the 2nd annual Homegrown Harvest which raised \$84,500.
- Worked with parishes to write Catholic Extension grants which funded over \$221,000.

Catholic Service Appeal

- Catholic Service Appeal raised \$1,066,000 with 2,295 donors. The average gift was \$464.53. The goal for the 2022 Catholic Service Appeal was \$1,153,654. Due to the pandemic the goal was not reached but the generosity of those who could give helped fund the 11 ministries served by the appeal.
- Catholic Charities provides social services around the state with offices in Jackson, Natchez and Vardaman. They offer adoption, mental health services, migrant services, domestic violence services and much more. Catholic Charities received \$300,329 which is 31.57%.
- Formational Ministry offices work to bring people into a closer relationship with God through religious education, family ministry, intercultural ministry and youth ministry which received a total of \$150,500 which is 15%.
- Religious Education and Faith Formational Office received \$40,000
- Family Ministry received \$35,500
- Intercultural Ministries received \$40,000
- Youth Ministry received \$35,500
- Campus Ministry provides young adults in college a way to connect and grow their faith, which received \$50,000 which is 5%.
- Parishes and Schools receive support through a grant process to help with projects and outreach and received \$75,000 which is 8%.
- Retired Priests and Clergy Assistance continue to serve our diocese. Currently, we have 21 retired priests in our diocese and received \$175,000 which is 18%.
- The CSA provides our six seminarians in formation to the priesthood, which received \$150,000 which is 16%.

Catholic Foundation

- There were 13 new trusts established with the Catholic Foundation. The Foundation celebrated 48 years and the investments reached \$58M.
- The Foundation distributed 7.5% to trust beneficiaries and distributed \$98,000 to 22 grant projects.
- The Foundation had 811 members and raised over \$99,000 for membership. This helps the operations of the Foundation office so that management fees are not charged to each trust.

DIRECTORS' SUMMARIES

FAITH FORMATION

DIRECTOR
FRAN LAVELLE

Office of Family Ministry

- The Knights of Columbus Ultrasound Initiative remains a vital ministry. The Tupelo Knights of Columbus Council were given approval by the Fraternal Mission to move forward to the next step of the Initiative.
- The Office is partnering with “Her PLAN (Her Pregnancy and Life Assistance Network)” to create a website that is a comprehensive directory of services supporting pregnant and parenting women throughout the diocese.
- Engaged Encounter weekends were resumed in October 2021 after being suspended due to the pandemic.

Office of Intercultural Ministry

- Led workshops on the pastoral letter on racism “Open Wide Our Hearts” to groups that ranged in age and backgrounds in Tupelo, Yazoo City, and Greenwood
- Led bilingual presentations: on Evangelization and Confirmation
- Spoke at several parishes including Camden, Canton, Yazoo City, Booneville, Ripley, Pearl, among others, which included celebrating the Mass and introducing the mission and vision of the OIM to get to know the parishes in the diocese
- Celebrated diversity and encouraged people by promoting their cultural heritage and celebrated Ripley’s bilingual feast of their patron saint and Our Lady of Guadalupe in Pontotoc and Jackson
- Led the Spanish LIMEX Retreat at Tupelo

Office of Religious Education & Faith Formation

- In person ministry resumed with the return of the Pastoral Ministry Workshop, a formation program for lay leaders
- Increased number of Catechists certification in both Level I and Level II
- Resumed presenting in-person retreats

Office of Youth Ministry

- Accommodated and safely sponsored two annual youth events – the July Search Retreat for juniors and seniors and a Middle School Fall Retreat for seventh and eighth graders.
- Introduced a new training program for youth ministers called “First Things in Youth Ministry.” The program is sponsored by the National Federation for Catholic Youth Ministry.
- Launched a new digital permission form platform, PermissionClick, for any parish in the diocese. The platform allows parishes to send and receive digital permission forms and collect electronic signatures from parents for youth events, trips and service projects.
- Abbey Schuhmann, coordinator for the OYM was elected to serve on the Board of Directors for the National Federation for Catholic Youth Ministry in the U.S.



VOCATIONS

DIRECTOR
FATHER NICK ADAM

- The Department of Vocations hosted two major discernment retreats for young men who are open to the possibility of a call to priesthood. These two *Quo Vadis?* retreats were modeled on events held in other dioceses but were the first to be offered in the Diocese of Jackson. Approximately 25 young men attended these retreats free of charge.
- Hosted three discerners at Notre Dame Seminary and St. Joseph Seminary College for a more focused visit to see what seminary life is like. One young woman visited a religious community during this calendar year.
- Father Nick visited approximately 25 parish communities and missions, with visits consisting of weekend masses, youth group talks, and other activities. He also visited several diocesan schools throughout the year, celebrating school Mass or hosting other activities to promote vocations. All of his travel was supported through the vocations budget.
- We have six seminarians studying for the diocese with no new seminarians beginning formation this calendar year. Deacon Andrew Bowden was ordained a transitional deacon at St. Jude in Pearl in May 2021. He will be ordained a priest May 14, 2022.
- One woman from our diocese entered religious life, as Kathleen McMullin is now in Postulancy with the Sisters of St. Francis of the Martyr St. George in Alton, Illinois. While our annual budget along with Catholic Service Appeal allotment pays for all tuition, books and fees for our seminarians as well as our promotional efforts for diocesan priesthood, we also seek to support candidates for religious life as they continue to discern their vocation, but their chosen order pays their tuition/room/board/etc. once they enter into postulancy or the novitiate.
- Held the 2nd Annual Homegrown Harvest Festival at St. Paul Flowood. Proceeds went to support promotional programs, trips, retreats, support services for discerners, as well as seminarian education.

PERMANENT DIACONATE AND HUMAN RESOURCES

DIRECTOR
DEACON JOHN MCGREGOR

- Six men have begun their final year of formation for the Permanent Diaconate. They are scheduled to be ordained on July 16, 2022.
- Eight men have been accepted into Aspirancy for the Permanent Diaconate. Aspirancy is the year of prayer and discernment before they begin the four-year formation program.
- Developed a new section of the Chancery Personnel Handbook, which eliminated previous ambiguities and abandoned practices.
- Hired Jenifer Jenkins to replace Vickie Carollo after her retirement. Jenifer is making great progress with getting people “back on track” with Virtus and Protection of Children and Vulnerable Adults training, following the COVID shutdowns.



COMMUNICATIONS

DIRECTOR
JOANNA PUDDISTER KING

- Assisted in implementing new parish and diocese email and text communication tool – Flocknote.
- Aided with live streaming special events, funerals and Masses with Bishop Kopacz.
- Increased online presence with increased postings on Facebook and Twitter. Also, the creation of an Instagram account. All may be followed with the tag @jacksondiocese.
- Boosted chancery department and Catholic Charities events with online advertising.
- Mississippi Catholic continued publishing throughout the pandemic and added an online “flip” edition through Issuu. Additionally, staff began an email version of the paper and with the aid of the Flocknote system, is made available for parishes to send to their flocks. To join the email list, text MSCATHOLIC to 84576. An English and Spanish version are available.
- Worked with Bishop Kopacz on videos touching on various Catholic events, holy days and Catholic social teaching topics.

STATEMENTS of INCOME AND EXPENSES

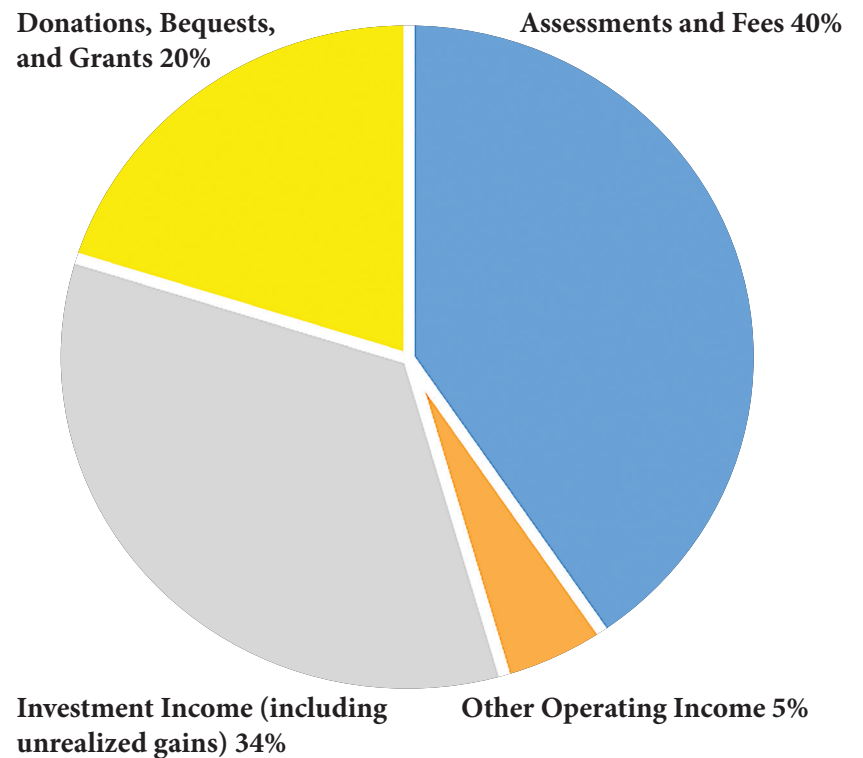
INCOME (EXCLUDING SARULLO ESTATE)

Catharticum Assessment	\$ 2,866,313	
Management fees	88,600	
Workshop and convention fees	17,266	
Registration fees and tuition	67,941	
Total Assessments and Fees	\$ 3,040,120	
Donations	\$ 149,992	
Catholic Foundation Trust Income	229,943	
Grants	216,239	
Catholic Service Appeal	944,506	
Total Donations, Bequests, and Grants	\$ 1,540,680	
Newspaper advertising income	\$ 37,808	
SMP Insurance program net	272,464	
Rental income	16,762	
Other Income	38,214	
Total Other Operating Income	\$ 365,248	
Investment and loan interest & dividends	\$ 758,928	
Unrealized and realized gain on investments	1,243,752	
Gain on disposal of property	97,585	
Reversal of loan lossess	501,539	
Total Investment Income	\$ 2,601,804	
TOTAL INCOME	\$ 7,547,852	
Assessments and Fees	40%	\$ 3,040,120
Other Operating Income	5%	365,248
Investment Income (including unrealized gains)	35%	2,601,804
Donations, Bequests, and Grants	20%	1,540,680
Total	100%	\$ 7,547,852

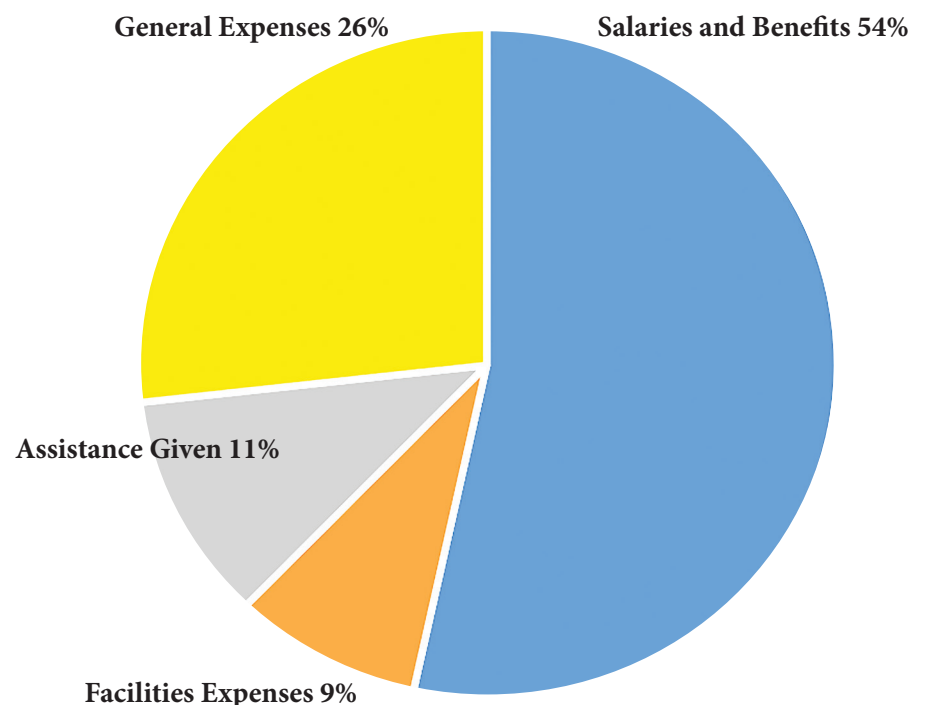
EXPENSES

Salaries and Wages	\$ 1,586,791	
Employee and Priest Benefits	1,250,924	
Total Salaries and Benefits	\$ 2,837,715	
CSA Allocated to Catholic Charities	\$ 255,302	
Grants, Contributions, and Assistance	355,721	
Total Assistance Given	\$ 591,023	
Advertising	\$ 21,461	
Dues, Subscriptions and Periodicals	9,146	
Interest expense DL Fund	188,189	
Mississippi Catholic newspaper, printing and distribution	191,452	
Office supplies, Postage, and Printing	25,532	
Pastoral	80,640	
Professional services	242,328	
ParishSoft Software	104,335	
Public relations	9,687	
Registration fees and tuition	268,476	
Computers and Software	91,332	
Travel	15,544	
Workshops and conventions held and attended	33,969	
Other Expenses	121,654	
Total General Expenses	\$ 1,403,745	
Maintenance, Building, Grounds, Equipment	\$ 74,899	
Depreciation	288,177	
Telephone and Utilities	87,256	
Other	5,302	
Total Facilities Expenses	\$ 455,634	
TOTAL EXPENSE	\$ 5,288,117	
Salaries and Benefits	54%	\$ 2,837,715
Facilities Expenses	9%	455,634
Assistance Given	11%	591,023
General Expenses	26%	1,403,745
Total	100%	\$ 5,288,117

TOTAL INCOME (NOT INCLUDING SARULLO ESTATE)



TOTAL EXPENSES (NOT INCLUDING SARULLO ESTATE)



The Diocese of Jackson has launched a third-party reporting system that will enable all diocesan employees, volunteers and parishioners to anonymously (or named if preferred) make reports. Examples of this activity include fraud, misconduct, safety violations, harassment or substance abuse occurring at a Catholic parish, Catholic school or at the diocesan level.

To make a report visit
www.lighthouse-services.com/jacksondiocese or
 call 888-830-0004 (English) or
 800-216-1288 (Spanish).

