

May 1–3, 2022  
51ST ANNUAL CONVOCATION  
ALBUQUERQUE

# Taking it to New Heights:

JUSTICE IN THE WORKPLACE



NATIONAL ASSOCIATION  
OF CHURCH PERSONNEL ADMINISTRATORS

# Taking it to New Heights: JUSTICE IN

## NACPA Extends a Note of Gratitude

The National Association of Church Personnel Administrators extends a note of deep gratitude to the Archdiocese of Santa Fe for hosting this 51st NACPA convocation. In particular, the Board of Directors is grateful to the following for their tremendous support and gracious gifts of time and talent.

### The Archdiocese of Santa Fe

Archbishop John C. Wester  
Donna Illerbrun  
Very Reverend Glennon Jones  
Thomas Macken  
Leslie Radigan  
Cathy Salcido  
Tony Salgado  
Damaris Thillet

#### Opening Liturgy, Sunday

Archbishop John C. Wester  
Bishop Edward J. Weisenburger  
Damaris Thillet

#### Morning Prayers

Damaris Thillet

### NACPA Convocation Committee

#### CHAIR

Eileen Cull Valdez  
Maureen Fontenot  
Jillian Green  
Regina Haney  
Barbara Keebler  
Geri Mesik  
Charlie Pavlovsky  
Lisa Pinto  
Rev. Edward T. Pratt  
Jessica Randazzo  
Cathy Salcido  
Leigh Scarboro  
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of Flamenco

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Katherine Kremer

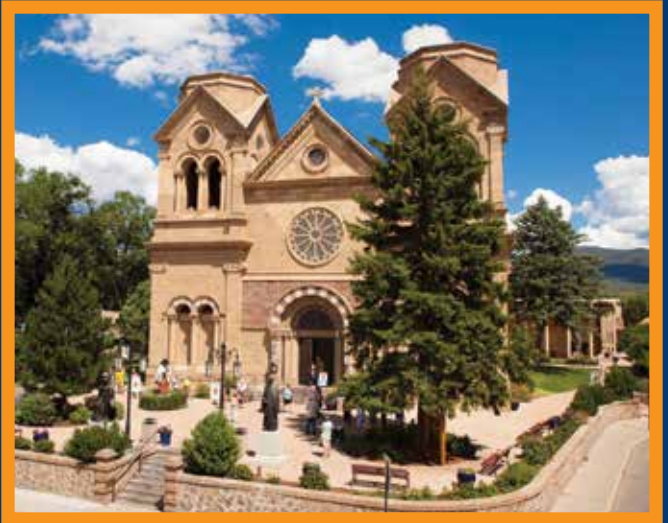
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# Table of Contents

## 2022 NACPA Convocation

Table of Contents	1
Bishop Edward J. Weisenburger	2
Archbishop John C. Wester	3
Elizabeth Allen, Board President	4
Regina Haney, Executive Director	5
Opening Liturgy and Plenary Sessions	6
Program and Workshops	7 - 17
NACPA Awards	18
NACPA Board of Directions and Association Staff	19
Where in the USA is NACPA?	20
NACPA Consulting Services	21
Historical Overview of NACPA	22 - 23
Association Leadership—Then and Now	24
NACPA Sponsors and Sponsorship Opportunities	25
Welcome to Baltimore 2023	26
Archdiocese of Santa Fe	27
Advertisers	28 - 35
Let's Move: Health Break	35
NACPA Exhibitors	36 - 39
Attendees	40 - 43
Notes	44
Session Locations	45
NACPA Convocation 2022: Schedule at a Glance	Back Cover

## SHRM/HRCI Credit Overview



This activity has been approved for 12 recertification credit hours of which 9 are business credit hours toward aPHR®, PHR®, PHRca®, SPHR®, GPHR®, PHRI™ through HR Certification Institute® (HRCI®). Full Registration Attendees will receive the activity ID after the program concludes. For more information about certification, please visit the HR Certification Institute website at [www.hrci.org](http://www.hrci.org).



NACPA 2022 is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CP or SHRM-SCP. This program is valid for 12 PDCs for the SHRM-CP or SHRM-SCP. For more information about certification or recertification, please visit <https://www.shrm.org>

**1.5** Business Credits **1.5** HR Credits

# Taking it to New Heights: JUSTICE IN



Roman Catholic

**Diocese of Tucson**

Office of the Bishop

P.O. Box 31, Tucson, Ariz., 85702 ■ 520-838-2500 ■ Fax: 520-838-2590

May 1, 2022



To all members of NACPA,

Warm congratulations on your 51st anniversary. It's great to have this convocation in person once again. While I enjoyed meeting many of you during last year's virtual meeting in Baltimore, it is a particular joy for me to be with you in person in the beautiful and historic Archdiocese of Santa Fe.

I join with NACPA's Board of Directors in thanking our generous host, Archbishop John Wester, for his kind hospitality. Many of the archdiocesan staff have shared their talents and time to make this event successful. We are grateful to Archbishop Wester for paving the way for this collaboration.

It is a special honor for me to concelebrate the opening liturgy with the archbishop. Although the convocation is an excellent resource for vital professional development, I believe it is a great opportunity for spiritual renewal as well. We begin each day in prayer, enhanced by beautiful music.

Another highlight of this gathering is the recognition of exceptional leaders. Congratulations to Fr. Frank Donio on receiving the Leadership Award and Mary Santi as the recipient of the Vision Award. Joe Smith will be celebrated for many years of outstanding service and we also will salute Elizabeth Allen, our retiring board chair, and Beverly Escamilla for their years of board service.

Dr. Regina Haney, our Executive Director, often tells me about the amazing support our association receives from engaged and dedicated board and committee members. Let me thank all of you for your service. It will propel us into the next half century of leadership in promoting justice in the workplace.

May God bless you abundantly,

*Edward J. Weisenburger*

Most Reverend Edward J. Weisenburger  
Bishop of Tucson



Archdiocese of Santa Fe  
4000 St. Joseph Place NW  
Albuquerque, NM 87120



Telephone: 505-831-8120  
Fax: 505-831-8101  
Email: [archbishop.office@archdiosf.org](mailto:archbishop.office@archdiosf.org)

### OFFICE OF THE ARCHBISHOP

May 1, 2022

Dear Brothers and Sisters in Christ,

On behalf of the faithful, religious and clergy of the Archdiocese of Santa Fe, I welcome you to Albuquerque for the annual conference of the National Association of Church Personnel Administrators (NACPA). I hope you feel welcome here in the Southwest where Christianity has flourished for over 420 years. Our adobe mission churches, nineteen pueblos, rich multicultural heritages and vibrant liturgical celebrations all combine to make what I hope will make your time here a memorable experience for you. Archbishop Lamy was our first archbishop, made famous in Willa Cather's *Death Comes for the Archbishop*. While this famous author may have taken certain liberties in her novel, she was spot on in portraying this portion of the Lord's vineyard as an enchanting land where God's creative beauty is reflected in the beautiful sunsets and in the smiles of its diverse people.

I wish to take the opportunity of this welcome letter to thank you all for your important and critical work in ensuring that Catholic Church administration meets the highest standards possible. Those who work for our parishes, schools, chanceries, pastoral centers and other Catholic institutions deserve the absolute best when it comes to developing their full potential and ensuring that they have just, safe and affirming workplace settings. I have seen over the years how NACPA lives up to its mission to "promote leadership in human resources, finance and administration that models Gospel values, promoting justice in the workplace." Your emphasis on combining Catholic Church social teaching with sound administrative principles is needed today more than ever as our Church deals with systemic racism, poverty, social unrest and polarization. I feel privileged to acknowledge your successful efforts in responding to these challenges and I join so many others who thank you for the key role you play in our Church.

As our dioceses engage in *Synod 2021-2023: For a Synodal Church*, I am encouraged to hear from our people that this process itself is life-giving and hopeful. I believe that the same is true of NACPA. Your contributions to Church administration give so many of us hope and new life. I pray that your conference here in Albuquerque will further your goals and afford each of you an opportunity to deepen the bonds that unite you as you re-commit yourselves to the essential work of Church administration.

Wishing you the fullness of Christ's peace during this Easter Season and asking our Risen Lord to raise his arms of benediction over you, I remain

Sincerely yours in the Lord,

*+ John C. Wester*

Most Reverend John C. Wester  
Archbishop of Santa Fe



# Taking it to New Heights: JUSTICE IN



## NATIONAL ASSOCIATION OF CHURCH PERSONNEL ADMINISTRATORS

2121 Eisenhower Avenue, Suite 200 Alexandria, Virginia 22314 571.551.6064 | [nacpa@nacpa.org](mailto:nacpa@nacpa.org) | [www.nacpa.org](http://www.nacpa.org)

May 1, 2022

Dear NACPA Delegates, Sponsors, Exhibitors and Supporters,

Welcome to the beautiful city of Albuquerque in the great Archdiocese of Santa Fe. The name – Santa Fe – means holy faith. That is especially appropriate to consider this year. We are returning to an in-person gathering after two virtual years. We are moved forward by our faith and commitment to our ministry as Human Resources leaders.

Last year we marked our golden anniversary and managed a stellar celebration online. As we commemorated our past, we resolved to strengthen our future with the creation of a 50th anniversary fund raising campaign. The monies raised will ensure that more members can attend convocations and participate in the certification program. We're earmarking funds for expanded member services, including research and publications. Thank you to all of our visionary supporters who have contributed to this key initiative.

Let me also join with Bishop Weisenburger, our Episcopal Moderator, in thanking the leadership in the archdiocese for their support. Their names are gratefully noted in the inside cover of this program. I do want to underscore our gratitude to the convocation committee for its ongoing work and determination to make this event the best ever and, in particular, Cathy Salcido, the Director of Human Resources in the Archdiocese of Santa Fe. These are complex times and Cathy helped us navigate them with grace and resolve.

NACPA also sends a grateful note to all of our sponsors and exhibitors. Many of you have faced challenging times in recent years but you have returned, giving us your full support and encouragement. Thanks to you, we can serve our members better with a lively and engaging exhibition.

Finally, I am grateful for the opportunity of serving these past two years as president of the Board of Directors. It has been an honor for me and a great blessing in my life journey.

I wish you all an excellent convocation ahead.

Sincerely,

Elizabeth Allen, SPHR, SHRM-SCP  
President, NACPA Board of Directors





### NATIONAL ASSOCIATION OF CHURCH PERSONNEL ADMINISTRATORS

2121 Eisenhower Avenue, Suite 200 Alexandria, Virginia 22314 571.551.6064 | [nacpa@nacpa.org](mailto:nacpa@nacpa.org) | [www.nacpa.org](http://www.nacpa.org)

May 1 2022

Dear Delegates, NACPA members, Sponsors, Exhibitors and Colleagues in the Archdiocese of Santa Fe,

“Taking It To New Heights: Justice in the Workplace” is the message you’ve been seeing in ongoing emails, tweets, website updates—and even on a colorful and tangible jumbo postcard—as we’ve promoted NACPA’s convocation.

Our meeting graphics reflect an Albuquerque marvel—the International Hot Air Balloon Festival which marks its 50th anniversary in October (a year younger than our association).

Most of us won’t be here to witness the breathtaking beauty of 500 balloons taking flight. However, I hope that the three days ahead will be a memorable experience that takes you to new heights as you move forward professionally and spiritually.

Looking at our two keynote presentations, I find them well-suited to challenge and inspire. Kim Daniels will focus on faith in action and Chris Lowney promises to help us become the spiritual leaders we’ve always hoped to be.

Add to this a series of excellent workshops presented by leaders in our association and industry and round tables that are geared to lively discussions. After two years, we also are fortunate to have an excellent exhibition.

There are so many people who have joined in designing this meeting. Some of them are listed in this program; others are behind the scenes, but their contributions have been vital.

I join with Bishop Edward Weisenburger in thanking Archbishop John Wester for his great support and for the collaboration of his staff. I also am delighted that Bishop Weisenburger kindly decided to head north, driving 449 miles from Tucson to Albuquerque to be with us and meet so many of our members.

May this meeting be a successful one for you. May you learn, network and thrive. Thank you for letting us take you to new heights.

Sincerely,

  
Regina Haney, Ed.D.

Executive Director  
NACPA



# Taking it to New Heights: JUSTICE IN

## Opening Liturgy

SUNDAY, May 1, 2022 | 5:00 PM



### ARCHBISHOP JOHN C. WESTER

Archbishop Wester was installed as the 12th Archbishop of Santa Fe on June 4, 2015, in the Catholic Basilica of St. Francis of Assisi in Santa Fe, New Mexico. Archbishop Wester was ordained a priest on May 15, 1976. He was consecrated and installed as auxiliary bishop of San Francisco and appointed vicar general on September 28, 1998. He was appointed Bishop of Salt Lake City on January 8, 2007.



### BISHOP EDWARD J. WEISENBURGER

Bishop Weisenburger was installed as Bishop of Tucson on November 29, 2017. On December 19, 1987, he was ordained a priest at the Cathedral of Our Lady of Perpetual Help in Oklahoma City. In June of 1996 he was appointed vicar general of the Oklahoma archdiocese. On October 2, 2009, he was appointed a Prelate of Honor to His Holiness, Pope Benedict XVI with the title of Reverend Monsignor. He was appointed Bishop of Salina, Kansas on February 6, 2012.

## Plenary Sessions

MONDAY, May 2, 2022 | 8:30 - 10:15 AM



### CHRIS LOWNEY

#### Become the Spiritual Leader You Always Wanted To Be

The time has come to create a “new culture of leadership” as our parishes and institutions confront a VUCA world—an environment marked by volatility, uncertainty, complexity and ambiguity. To thrive, individuals will need to embrace their call to show leadership within their roles—a call that is rooted in the baptismal promise. Chris Lowney also will help convocation delegates become better decision makers. His presentation will describe a habit of self-reflection that can keep people on track amidst the confusing chaos of everyday life.

**ABOUT THE SPEAKER.** An international speaker on leadership and ethics, Chris is the author of *Everyone Leads: How to Revitalize the Catholic Church* and *Pope Francis: Why He Leads the Way He Leads* which has been called a book for the ages. Chris chairs the board of Catholic Health Initiatives, one of the nation’s largest health care systems. [www.chrislowney.com](http://www.chrislowney.com) | [chrislowney@gmail.com](mailto:chrislowney@gmail.com)

TUESDAY, May 3, 2022 | 8:30 - 10:15 AM



### KIM DANIELS

#### Faith in Action: The Catholic Church and Public Policy

Faced with a deadly pandemic; political polarization dividing families, friends, schools and parishes; and declining credibility for Catholics in the public square, how can Catholic institutions and individuals effectively witness to our faith in public life so as to best advance the principles we share? Kim Daniels will draw on lessons learned from Pope Francis’ teachings, as well as her work at Georgetown’s Initiative on Catholic Social Thought and Public Life and at the Vatican, to describe a path forward for Catholic witness and advocacy in these challenging times.

**ABOUT THE SPEAKER.** Co-director of Georgetown University’s Initiative on Catholic Social Thought and Public Life and an adjunct professor in the Department of Theology and Religious Studies, Kim serves as consultant to the U.S. Conference of Catholic Bishops’ Committee for Religious Liberty. [kd760@georgetown.edu](mailto:kd760@georgetown.edu)



## Program and Workshops

### SUNDAY, MAY 1

- 1:00 – 4:00 p.m. Exhibit set up
- 2:00 – 4:00 p.m. Registration **Location: Exhibit Hall**
- 3:00 p.m. New Members Orientation **Location: Fireplace Room**

5:00 – 6:00 p.m. **OPENING LITURGY** **Location: Chapel of the Hotel Albuquerque**

**ARCHBISHOP JOHN C. WESTER**  
**BISHOP EDWARD J. WEISENBURGER**

The opening liturgy will be concelebrated by the Most Reverend John C. Wester, Archbishop of Santa Fe, and the Most Reverend Edward J. Weisenburger, Bishop of Tucson and Episcopal Moderator of NACPA.

6:00 – 7:00 p.m. Welcome and Happy Hour **Location: Pavilion/Gardens**

### MONDAY, MAY 2

- 7:00 – 8:30 a.m. Continental Breakfast **Location: Exhibit Hall**
- 8:00 – 8:30 a.m. Morning Prayer **Location: Alvarado D**

8:30 – 10:15 a.m. **PLENARY SESSION with Q&A** **Location: Alvarado D** **1.5**  
Become the Spiritual Leader You Always Wanted To Be  
**CHRIS LOWNEY**

10:15 – 11:30 a.m. BREAK **Location: Exhibit Hall**

10:20 a.m. Book Signing by Chris Lowney **Location: NACPA Registration Desk, Exhibit Hall**

#### Session Tracks

This year NACPA is introducing session tracks to help delegates customize their convocation experience. Tracks include:



**Law & Compliance**



**Future Workplace**

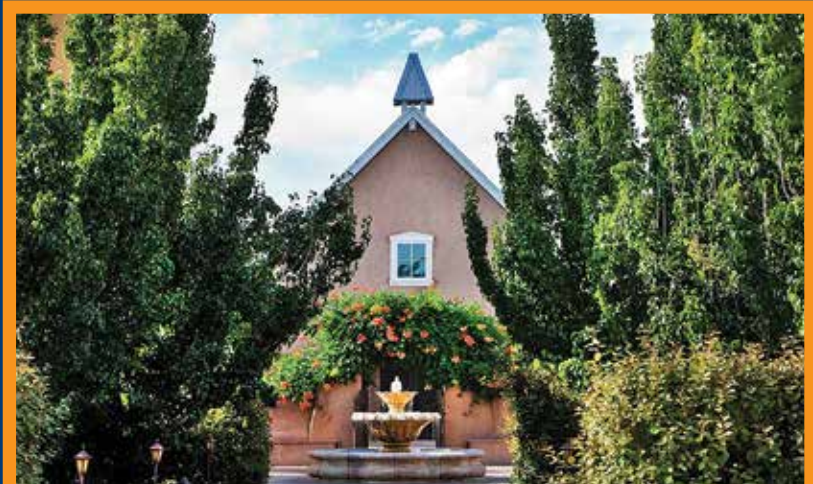


**HR Management**



**Wellness and Spirituality**

**SAN ISIDRO DE CAPILLA**  
(Chapel at the Hotel Albuquerque)



# Taking it to New Heights: JUSTICE IN

## Program and Workshops

MONDAY, MAY 2

11:30 a.m. – 1:00 p.m. **WORKSHOP SESSION 1**



**101** Track: Law & Compliance Location: Alvarado A

### The Ministerial Exception, Religious Exemptions and Employees in 2022 1.5

Jennifer Gniady, Counsel, Stradley, Ronon, Stevens & Young, LLP, [jgniady@stradley.com](mailto:jgniady@stradley.com)

Employment in the church and its ministries presents unique challenges within employment law. For more than a decade, courts increasingly have defined the ministerial exception to protect religious autonomy in employment decisions. Similarly, employment laws may have significant religious exemptions that apply. This workshop maps the headline-making cases and examples onto real world practices with employees, while building awareness of the practice parameters in this developing area. The session also enhances the HR professional's understanding of the nuances of practicing within a particular industry or sector.

#### ABOUT THE SPEAKER.

Jennifer Gniady is counsel in the Nonprofit and Religious Organizations practice of Stradley, Ronon, Stevens, & Young, LLP. She assists religious institutes in matters of governance, corporate structures and trust formation. She works with lay religious groups and associations on business transactions, tax-exempt regulations, and religious freedoms. Jennifer is a graduate of Fordham University School of Law and clerked in the District of Columbia before entering private practice.



**102** Track: Future Workplace Location: Alvarado B

### Manage Generational Differences in the 21st Century Workplace by Leveraging your HRIS Data 1.5

Sarah Fogler, SPHR, SHRM-SCP, Director of Human Resources, Diocese of Richmond, [sfogler@richmonddiocese.org](mailto:sfogler@richmonddiocese.org)

With five generations in the workforce, how can you best leverage your employee data for success? Understand the demographics of your labor pool and how those generations view the future, the value of the work they do today and how they understand working with their colleagues. Learn how workplace values, beliefs, and behaviors are impacted by individual generational perspectives and how to provide stakeholders with the data necessary to identify generational cohort groups internally.

#### ABOUT THE SPEAKER.

Sarah Fogler is the Director of Human Resources for the Diocese of Richmond, where she has served for more than 12 years. She is an experienced national presenter and has an Ed.M. in Educational Administration and Training. Sarah has more than 25 years of experience in Human Resources roles in both corporate and non-profit organizations, ranging from 15 to 30,000 employees. Her HR background includes training design and delivery, recruiting, benefits, HRMS and payroll and strategic organization and client management.

## Program and Workshops

**MONDAY, MAY 2**

11:30 a.m. – 1:00 p.m.



**103** Track: **Future Workplace** Location: **Alvarado C**

### Performance Reviews in a Flexible Workspace World <sup>1.5</sup>

Kim O'Donoghue, SHRM-SCP, SPHR Senior Human Resource Manager, Archdiocese of Chicago, [kodonoghue@archchicago.org](mailto:kodonoghue@archchicago.org)

Annabelle Baltierra, Senior Director of Human Resources, Archdiocese of Los Angeles, [abaltierra@la-archdiocese.org](mailto:abaltierra@la-archdiocese.org)

Performance management is imperative to the development of your staff through frequent, ongoing feedback. When handled effectively, it can improve productivity; reduce costs and support a successful work environment. Creating an effective performance management system is challenging in the best of times, but the last two years have required new ways to address commonplace acts. This session will review the core components of performance management and show how to apply those values to a remote or hybrid workforce. Real-life examples and knowledge gained over the course of the pandemic and beyond will be shared.

#### ABOUT THE SPEAKERS.

Kim O'Donoghue is Senior Human Resources Manager for the Archdiocese of Chicago, managing employee relations for more than 3,000 employees in 165 locations. Her experience includes performance management, conflict management, compliance, employee engagement and training and development. Kim has a degree in Industrial Organizational Psychology from the University of Illinois Urbana-Champaign.

Annabelle Baltierra has more than 30 years of experience in the HR field and serves as Senior Director of Human Resources for Archdiocese of Los Angeles, with 600 locations and 17,000 employees. Her previous employers include the City of Santa Clarita, Cedars-Sinai Health Systems and the California Institute of the Arts. She has worked in both the private and public sector, acting as an influential business partner to executive management and a representative for all levels of personnel.

THE ARCHDIOCESE OF SANTA FE  
HAS A VIBRANT CATHOLIC  
SCHOOL NETWORK.



Photo credit: Celine B. Radigan



THE CATHOLIC COMMUNITY IN  
THE ARCHDIOCESE OF SANTA FE  
TOTALS MORE THAN 324,000.



# Taking it to New Heights: JUSTICE IN

## Program and Workshops

MONDAY, MAY 2

11:30 a.m. – 1:00 p.m.



**104** Track: **HR Management** Location: **Fireplace Room**

### Let's Talk Diversity While Protecting your Ministry **1.5**

Bob Roper, Human Resources Director, Diocese of Kansas City - St. Joseph, [roper@diocesekcsj.org](mailto:roper@diocesekcsj.org)

Chris Hagen, SPHR, SHRM-SCP, Director of Human Resources, Diocese of Manchester, [chagen@rcbm.org](mailto:chagen@rcbm.org)

An informal drop in session to talk about where to begin the discussion around diversity within your organization.

Topics will include:

- Opening the discussion with your leadership team;
- Performing a Strengths, Weakness, Opportunities and Threats (SWOT) analysis of your employee lifecycle from recruitment, advancement, performance management, training, benefits and terminations;
- Defining the organizations' vision (with your leadership team) based on your SWOT analysis;
- Designing policies, programs and procedures that support that vision;
- Possible areas of defense: job ads, conduct policy, teacher contracts, interview questions, etc.; and
- Open discussion/questions

#### ABOUT THE SPEAKERS.

For the past eight years Bob Roper has served as Director of Human Resources, Diocese of Kansas City - St. Joseph. Some major initiatives include standardizing the payroll and benefits administration functions; redesigning the chancery HR service model and installing an automated solution to recruiting and onboarding processes across all 97 locations.

Chris Hagen, SPHR, SHRM-SCP, has been working happily in the Human Resources profession for 30 years. She has been with the Diocese of Manchester since 2006 as the diocese's first Human Resources Director. Chris has an MBA and holds certifications in diversity, equity, and inclusion from the Society of Human Resources Management (SHRM) and the University of Southern Florida. A life-long learner, Chris embraces continual improvement in her professional and personal life.

1:00 – 2:30 p.m.

**NACPA Business Meeting Luncheon** Location: **Franciscan** **1.5**

2:30 – 2:45 p.m.

**BREAK** Location: **Exhibit Hall**

Photo credit: Celine B. Radigan



NATIVE AMERICAN  
MINISTRY SERVES  
50,000 NATIVE  
AMERICAN CATHOLICS  
IN THE ARCHDIOCESE  
OF SANTA FE



# Program and Workshops

MONDAY, MAY 2

2:45 – 4:15 p.m.

## WORKSHOP SESSION 2



**201** Track: Law & Compliance Location: Alvarado A

### Understanding the Living Wage 1.5

Shannon Drohman, CCP, SPHR, SHRM-SCP, Principal, Compensation Connections,  
shannon@compensationconnections.com

Kathy Marek, CCP, SHRM-SCP, Senior Consultant, Compensation Connections,  
kathy@compensationconnections.com

The living wage concept is an important and complex topic for Catholic employers to consider—especially given the commitment to just treatment in the workplace. Shannon and Kathy will explore what is meant by “living wage,” how to determine a living wage for your area and offer ideas for implementation when budgets are already stretched thin.

#### ABOUT THE SPEAKERS.

Shannon Drohman has more than 25 years of experience in compensation and human resources and has designed compensation and classification programs, conducted market studies and custom surveys, created internal value systems, including job level guidance and performed pay equity analysis. As a principal with Compensation Connections, Shannon has worked with major religious employers, including arch/dioceses, Catholic schools and parishes, religious congregations and Catholic cemeteries.

Kathy Marek has more than 20 years of experience in Human Resources and is a senior consultant with Compensation Connections. Her career started as an internal HR team member, eventually working into the role of compensation analyst. Kathy transitioned into consulting work and has developed compensation programs, performed market studies, designed pay structures, analyzed benefits programs, and conducted employee pay analysis. She has provided consulting services for arch/dioceses, parishes and Catholic cemeteries.



**202** Track: Wellness and Spirituality Location: Alvarado B

### Hiding in Plain Sight: Your Employee Assistance Program 1.5

David Shellenberger, RN, BSN, President and Chief Executive Officer, Saint John Vianney Center,  
dshellenberger@sjvcenter.org

Organizations no longer can afford to overlook to have a blind spot to Employee Assistance Programs (EAP). The presentation will explore the purpose, function and, most importantly, the critical value of a comprehensive and effective EAP. Strategies and best practices will be shared for evaluating, promoting and attaining success of this crucial benefit.

#### ABOUT THE SPEAKER.

David Shellenberger, RN, BSN, is the President and Chief Executive Officer of the Saint John Vianney Center (SJVC). In this role, he works to increase awareness of SJVC's prevention and educational services, provides professional consultation to healthcare organizations and leads the organization in mission, strategy and operations. David joined the center in 2008 and has expanded its consultation and outreach services to dioceses and men and women religious leadership.



# Taking it to New Heights: JUSTICE IN

## Program and Workshops

MONDAY, MAY 2

2:45 – 4:15 p.m.



**203** Track: **Future Workplace** Location: **Alvarado C**

### **HR and Marketing – Driving Culture as Critical Thought Partners** 1.5

Buffy Blanton, Managing Director of Human Resources, Christian Brothers Services,  
buffy.blanton@cbservices.org

Terry Arya, Chief Marketing and Business Development Officer, Christian Brothers Services,  
terry.arya@cbservices.org

Company culture hinges on teamwork between departments. This session will emphasize workplace culture benefits when leveraging HR and marketing/communications functions. The presenters will divulge a company survey spotlighting the work-culture impact made with collaborative HR and marketing functions. Examples shared will show how goals and outcomes are better achieved in workplaces. Attendees will leave with a white paper on the topic to help adopt the winning mindset of HR and marketing as thought partners.

#### **ABOUT THE SPEAKERS.**

Buffy Blanton, Managing Director of Human Resources, Christian Brothers Services, began her career at CBS in 1992, working her way up through the human resource ranks, from administrative assistant to executive assistant to HR manager, and subsequently to her current role. Prior to joining CBS, Buffy worked for the City of Joliet, Illinois. She holds a bachelor's and a master's degrees in organizational leadership from Lewis University, Romeoville, Illinois.

Terry Arya, Chief Marketing and Business Development Officer, Christian Brothers Services, has more than 30 years of experience, with a proven background in organizational leadership, fully integrated marketing plans, business development, public relations, communications, sales, social media, grant writing, fundraising and business strategy. A work-culture leader, Terry also owned a marketing firm with clients ranging from business owners and not-for-profit organizations to tourism entities and municipalities.



**204** Track: **HR Management** Location: **Fireplace Room**

### **Personnel Investigation** 1.5

Ricardo Serrano, Consultant and retired HR Director, Diocese of Tucson, rser1942@aol.com

This session will take attendees through the steps in a personnel investigation that will include: the investigator's role and responsibilities; types of investigations; preparing for the investigation (identification of issues, identification of personnel involved); investigation procedures: (fact-finding, interviews, timeliness, investigation integrity); and investigation report (observations, conclusions and closeout).

#### **ABOUT THE SPEAKER.**

Prior to his retirement, Ricardo Serrano was the Director of Human Resources for the Diocese of Tucson for 13 years. He generously served on the NACPA Board of Directors for six years. As an encore to his retirement, Ricardo is an NACPA consultant, specializing in the development of job descriptions and personnel handbooks. Prior to church ministry, Ricardo was employed by the IBM Corporation for 26 years in Human Resources and Administrative Management.

4:15 – 4:30 p.m.

Speaker Chats Location: **Exhibit Hall**

5:00 – 5:30 p.m.

**Thank You Santa Fe Wine Tasting** Location: **Exhibit Hall**

## Program and Workshops

### TUESDAY, MAY 3

7:00 – 8:30 a.m. Continental Breakfast **Location: Exhibit Hall**

8:00 – 8:30 a.m. Morning Prayer **Location: Alvarado D**

8:30 – 10:15 a.m. **PLENARY SESSION with Q&A** **Location: Alvarado D**  
Faith in Action: The Catholic Church and Public Policy **1.5**  
**KIM DANIELS**

10:15 – 11:30 a.m. BREAK **Location: Exhibit Hall**

11:30 a.m. – 1:00 p.m. **WORKSHOP SESSION 3**



**301** **Track: Law & Compliance** **Location: Alvarado A**

#### **OSHA Regulatory Compliance and Response** **1.5**

Jeff Harrison, Director of Risk Control Services, Christian Brothers Services,  
jeff.harrison@cbservices.org

This workshop will:

- Walk attendees through the common areas of compliance that a religious organization should understand;
- Provide an understanding of how OSHA identifies organizations for their inspections;
- Offer an understanding of how to prepare for a possible OSHA inspection;
- Review what should be done during the inspection process; and
- Discuss a variety of ways an organization can respond to OSHA should they receive a citation.

#### **ABOUT THE SPEAKER.**

Jeff Harrison is the risk control coordinator for risk management services at Christian Brothers Services. Jeff develops online and field risk reduction programs and coordinates risk control services for more than 1,100 members nationwide. He has 25 years of experience in the field of risk management and has been with Christian Brothers Services for more than 20 years.



ST. FRANCIS OF ASSISI  
IS THE PATRON SAINT  
OF THE ARCHDIOCESE  
OF SANTA FE

# Taking it to New Heights: JUSTICE IN

## Program and Workshops

TUESDAY, MAY 3

11:30 a.m. – 1:00 p.m.



**302** Track: **HR Management** Location: Alvarado B

### Highlights of the 2022 Diocesan Salary Survey **1.5**

Beverly Escamilla, Director of Human Resources, Diocese of Beaumont, [bescamilla@dioceseofbmt.org](mailto:bescamilla@dioceseofbmt.org)

A task force member will present this session. The major goal of the task force was to make the survey user-friendly to encourage more NACPA member arch/dioceses to participate. The survey is a proven tool, providing invaluable data to assist members with annual budgeting, salary ranges, and benefit comparisons. The session will highlight: The profile of participating arch/dioceses; major findings; the organization of the report and the interpretation of the data.

#### ABOUT THE SPEAKER.

Beverly Escamilla has worked in the Diocese of Beaumont for more than 25 years in the Finance and Human Resources Departments. With a need to cut costs due to natural disasters and the pandemic, Beverly assisted in the strategic reorganization of the Pastoral Center offices resulting in a savings of a half million dollars. She views all positions in the church as ministry positions including areas such as accounting and human resources.



**303** Track: **HR Management** Location: Alvarado C

### Why HR Matters in Parishes and Schools: A Case Study on Developing a Field Training **1.5**

Sarah Fogler, SPHR, SHRM-SCP, Director of Human Resources for the Diocese of Richmond, [sfogler@richmonddiocese.org](mailto:sfogler@richmonddiocese.org)

How do you emphasize the importance of HR in the field? After seeing repeated errors relating to the many administrative areas of HR, the Diocese of Richmond developed and implemented a training series focusing on the critical HR KSAs—knowledge, skills and abilities—needed for success and compliance. This workshop will review the project development, rollout and results, as well as discuss the topics that were provided for training to business managers, principals and pastors.

#### ABOUT THE SPEAKER.

Sarah Fogler is the Director of Human Resources for the Diocese of Richmond, where she has served for more than 12 years. She is an experienced national presenter and has an Ed.M. in Educational Administration and Training. Sarah has more than 25 years of experience in Human Resources roles in both corporate and non-profit organizations, ranging from 15 to 30,000 employees. Her HR background includes training design and delivery, recruiting, benefits, HRMS and payroll and strategic organization and client management.



## Program and Workshops

**TUESDAY, MAY 3**

11:30 a.m. – 1:00 p.m.



**304** Track: **Future Workplace** Location: **Fireplace Room**

### **Leading Differently in this Future Workplace – It Is Here and Now: A Roadmap of HR Best Practices for Employee Recruitment and Retention** **1.5**

Kevie Mikus, SPHR, SHRM-SCP, Regional Area Vice President, Human Resources and Compensation Consulting Areas of Responsibility, Gallagher, kevie\_mikus@ajg.com

Despite the many changes church organizations faced over the past two years, one reality remained constant – an organization's foundation for success is its people. Creating a competitive and sustainable future, where you can easily attract and retain the right talent at the right cost, is paramount. You will hear from an HR thought leader and consultant on the latest trends and insights to find the best path to a confident, competitive and sustainable future. Topics range from recruitment, job descriptions and performance management to new leadership competencies and engagement.

Attendees will:

- Be inspired and better understand a path forward for meaningful and cost effective change to support the new era of work;
- Hear practical business stories regarding competitive strategies;
- Receive actionable tactics to support the HR function and heighten workforce engagement; and
- Take away innovative solutions for making informed decisions in the workplace

#### **ABOUT THE SPEAKER.**

Kevie Mikus, Regional Area Vice President, Gallagher, specializes in providing thought leadership and consultative support in the areas of human resource strategic management, employee engagement strategies, leadership development, HR function optimization, compliance, as well as compensation and total rewards. At Gallagher, Kevie supports her clients' organizational well-being by collaborating with them to develop HR best practices for recruiting, retaining, and engaging key talent.

1:00 – 2:30 p.m.

Free Time, Lunch not provided

2:30 p.m.

Exhibit Hall Closes

## THE ALBUQUERQUE INTERNATIONAL BALLOON FIESTA



# Taking it to New Heights: JUSTICE IN

## Program and Workshops

TUESDAY, MAY 3

2:30 – 4:00 p.m.

### WORKSHOP SESSION 4



**401** Track: **Law & Compliance** Location: Alvarado A

#### The New World of ACA Compliance - Here to Stay 1.5

Keith Pelatowski, CEO, Points North, [kpelatowski@points-north.com](mailto:kpelatowski@points-north.com)

Michael Baker, Compliance Counsel, Gallagher, [michael\\_baker@ajg.com](mailto:michael_baker@ajg.com)

ACA reporting should not make life difficult—yet measurement periods, safe harbor rules, service breaks, special leaves, change in status, variable-hour positions, employees working in multiple locations and other employment situations create complicated reporting systems. They also can lead to fines. With ACA repeal now removed, the regulations have become more complex, particularly with state level needs. This workshop will review what can be done for the upcoming new complex rules of ACA.

##### ABOUT THE SPEAKER.

Keith Pelatowski is an expert on software automation specific to compliance reporting. Keith is a frequent speaker on webinars and workshops with religious organizations, discussing key HR and process topics.

Michael Baker, as compliance attorney for Gallagher, advises businesses on the rules and compliance regulations across the US. Michael has expertise in the areas of Employee Benefits, ERISA, ACA, and Health Care Reform.



**402** Track: **HR Management** Location: Alvarado B 1.5

#### Coaching and Mentoring (Yourself and Others)

Bob Roper, Human Resources Director, Diocese of Kansas City - St. Joseph, [roper@diocesekcsj.org](mailto:roper@diocesekcsj.org)

This session will explore the interesting relationship between the role of HR in coaching and mentoring others, while keeping some wisdom for oneself. Serving school principals, parish business administrators and pastors—whose skills and experience are vastly different—brings incredible challenges. This presentation will provide the “Top 10” coaching and mentoring tips that have stood the test of time for the presenter over a few decades of providing HR support.

##### ABOUT THE SPEAKER.

For the past eight years Bob Roper has served as Director of Human Resources, Diocese of Kansas City - St. Joseph. Some major initiatives include standardizing the payroll and benefits administration functions; redesigning the chancery HR service model and installing an automated solution to recruiting and onboarding processes across all 97 locations.



**403** Track: **Future Workplace** Location: Alvarado C 1.5

#### Retirement Plans – New Best Practices

Mike Levin, Area Senior VP, Gallagher Retirement Consulting Services, [michael\\_levin@AJG.com](mailto:michael_levin@AJG.com)

The manner and methods whereby arch/dioceses manage their retirement plans continues to evolve. How a diocese approaches management and oversight has an increasingly large impact on employees' retirement savings and adequacy. As we emerge from the pandemic, strategies that address financial fragility and literacy will play a larger role in helping employees not only to save for retirement but also to reduce their overall stress, which impacts other costs such as healthcare and productivity.

# Program and Workshops

## TUESDAY, MAY 3

2:30 – 4:00 p.m.

### Retirement Plans – New Best Practices Continued

Attendees will gain a better understanding that includes but is not limited to:

- Creating a new 403(b) or enhancing your existing 403(b) plan design;
- The increasing trend toward pension plan de-risking and the impact on an 403(b) plan;
- Strategies to improve litigation resiliency for a diocese;
- Effective financial wellbeing approaches to increase the financial literacy of the workforce; and
- New and creative recruitment and retention strategies leveraging alternative savings vehicles

#### ABOUT THE SPEAKER.

For more than 25 years Mike Levin has worked with small, mid and large size employers to help them best manage their retirement benefit programs. Mike's specific expertise is to understand an organization and its employees overall needs and then develop innovative strategies to allow the retirement plans to most effectively support these goals. Mike has extensive experience working with religious organizations to help them maximize the effectiveness and efficiency of their retirement programs.



**404** Track: Wellness and Spirituality Location: Fireplace Room

### Leading Like Jesus:

### Living the Gospel When Managing Human Resources 1.5

Christopher Antone, President, Positive Employment Relations, cantone1978@gmail.com

Understand how Jesus' words and actions can guide you in your management of staff recruitment, communications, evaluations, respectful relationships, discipline and discharge. Chris's teaching style is highly interactive, so participants should be prepared to engage enthusiastically with fellow attendees. This workshop will help participants develop skills in strategic planning, critical thinking, influencing, negotiation and leadership.

#### ABOUT THE SPEAKER.

Christopher Antone has taught leaders how to create positive employment relationships for more than 40 years. A graduate of the Cornell University School of Industrial and Labor Relations, Chris has been recognized for his exceptional lectures by being inducted into the Southwestern Society of Human Resource Management HR Speakers Hall of Fame.

4:00 – 4:15 p.m.

BREAK / Speaker Chats Location: Exhibit Hall

4:15 – 5:45 p.m.

### ROUND TABLES (HOT TOPICS)

- Religious liberty's threats to health plans Location: Alvarado A 1.5
- How to incorporate mission and values into the daily workplace Location: Fireplace Room 1.5
- How to navigate a pay structure to meet the needs of the time: paid time off; flex time; remote working; workforce retention, etc. Location: Alvarado C 1.5
- Leading with empathy: What it is and why it is important Location: Alvarado B 1.5

5:45 – 6:30 p.m.

BREAK

6:30 – 7:00 p.m.

Social Location: Franciscan

7:00 – 9:00 p.m.

Closing Awards Banquet Location: Franciscan

**Convocation Adjourned — THANK YOU! — See you in 2023!**

# Taking it to New Heights: JUSTICE IN

## The NACPA 2022 Awards



**MARY E. SANTI**  
VISION AWARD  
NACPA 2022

**MARY E. SANTI, JCL, MDiv,  
SPHR, SHRM-SCP**

Chancellor/Executive Director of  
Human Resources (Ret.) Archdiocese of Seattle

Mary Santi is a long-time member of the association who has demonstrated exemplary vision on behalf of justice in the church workplace. As a canon lawyer and NACPA board member, Mary has been an informed and articulate ambassador for the association.

She has been recognized for mentoring individuals with HR responsibilities and has shared best practices with dioceses, parishes and religious communities. Her commitment is further reflected in the dozens of training sessions Mary has conducted for clergy and lay leaders on every facet of Human Resources. NACPA is grateful to Mary for sharing her vision through excellent presentations at convocations, webinars and conferences as well as her service on NACPA's Board of Directors.



**FR. FRANK DONIO**  
LEADERSHIP AWARD  
NACPA 2022

**FR. FRANK DONIO, S.A.C., D.Min.,  
M.S.C.M.**

Executive Director of the Conference of Major Superiors of Men (CMSM) and Founding Director of the Catholic Apostolate Center

Father Frank Donio consistently has provided outstanding leadership, guidance and service to those serving in the Human Resources ministry of the church. He is a key founder of NACPA's Certificate Program for Those Moving to Human Resources Responsibility in a Catholic Workplace. From its inception, Fr. Donio has served as one of the four presenters in the program on the topic of Catholic Social Teaching in a Catholic workplace. Fr. Donio co-authored NACPA's seminal publication, *Just Treatment for Those Who Work for the Church*, second edition. He continues to provide essential educational opportunities for NACPA's members and association friends.



**JOSEPH T. SMITH**  
OUTSTANDING SERVICE AWARD  
NACPA 2022

**JOSEPH T. SMITH**  
Director of Human Resources (Ret.)

Archdiocese of Baltimore

Joseph Smith's great support and leadership were instrumental in making NACPA's 50th anniversary convocation a great success. Although it was a virtual meeting, the Archdiocese of Baltimore was the host and Joe's vision and collaboration were vital in making this first ever virtual convocation move forward. Joe's membership in association committees has resulted in excellent initiatives, including a successful webinar series.



**ELIZABETH ALLEN**  
WITH GRATITUDE  
NACPA 2022 Board of Directors

**ELIZABETH ALLEN, SPHR, SHRM-SCP**  
Director of Human Resources, Diocese of Portland

Elizabeth Allen has led the association expertly during a pivotal time in its history, the 50th anniversary benchmark. As President of the Board of Directors, Liz has played a key role in navigating the association through the pandemic years, providing programs and services to support members. She generously shared her time and wisdom when asked to support the executive director and staff with a faithful collaboration needed to sustain a vital association. Liz was chairperson of the Webinar Design Team, providing members with timely information for those in the church workplace.



**BEVERLY D. ESCAMILLA**  
WITH GRATITUDE  
NACPA 2022 Board of Directors

**BEVERLY D. ESCAMILLA, PHR, SHRM-CP**  
Director of Human Resources, Diocese of Beaumont

Beverly Escamilla has served the association generously as a member of its Board of Directors and as an active and engaged committee member. Beverly has given her time and expertise to members by serving as a speaker at NACPA convocations.

Beverly also has provided outstanding leadership to ensure that the organization's bylaws remain an effective governance tool. In 2017-2018 she led the effort to make major bylaw changes so that they adequately reflect the organization. She also is one of the creators of the On Demand Discussion Series: Vital Discussions for Today's Church HR Issues.



## Board of Directors and Association Staff

NACPA is led by a visionary and dedicated Board of Directors who generously give their time and talents to advancing workplace justice.

### BOARD OF DIRECTORS

#### Episcopal Moderator

**Bishop Edward J. Weisenburger**  
Diocese of Tucson

#### President

**Elizabeth Allen, SPHR, SHRM-SCP**  
Director of Human Resources  
Diocese of Portland  
Portland, ME  
elizabeth.allen@portlanddiocese.org

#### President-Elect/Secretary

**Eileen Cull Valdez, SPHR, SHRM-SCP**  
Director of Human Resources  
Diocese of Des Moines  
Des Moines, IA  
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#### Treasurer

**Patricia Kerner**  
Director of Human Resources  
Diocese of Rockville Centre  
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##### Rev. Edward T. Pratt

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epratt@ascensionkettering.org

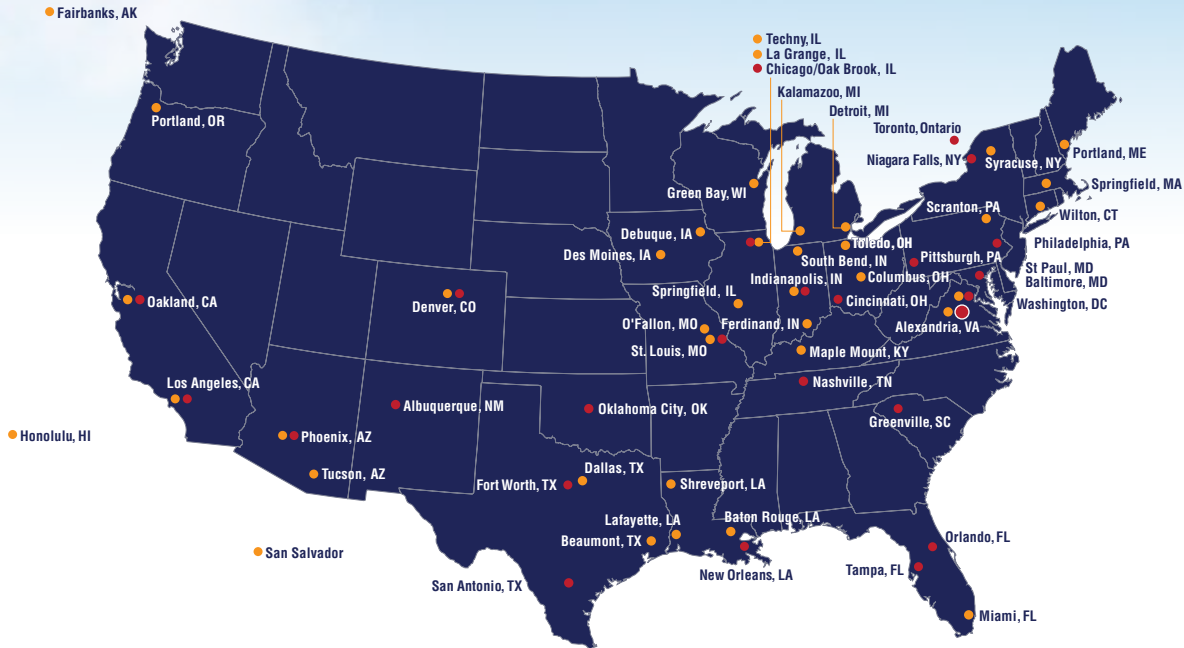
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Executive Director  
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nacpa@nacpa.org

# Taking it to New Heights: JUSTICE IN

## Where in the USA is NACPA?

Check out NACPA's national outreach in the convocation/consultation map below. Albuquerque, New Mexico's largest city with a population of 560,000, is the site of NACPA's 51st convocation. The association last convened there almost 30 years ago. The map also tracks past convocation locations. (Next convocation stop: Baltimore, April 30-May 2, 2023.) In addition, cities where NACPA conducted consultations during 2021-2022 are marked.



State	CONSULT	CONVOCAION
<b>Alaska</b>		
Fairbanks	●	
<b>Arizona</b>		
Phoenix	●	● 2003, 2014
Tucson	●	
<b>California</b>		
Los Angeles	●●	● 1990, 2005
Oakland	●●	● 1986, 1997
<b>Colorado</b>		
Denver	●	● 2001
<b>Connecticut</b>		
Wilton	●●	
<b>District of Columbia</b>		
Washington	●●	● 2000
<b>Florida</b>		
Miami	●	
Orlando		● 2002, 2008
Tampa		● 2012, 2013
<b>Hawaii</b>		
Honolulu	●	
<b>Illinois</b>		
Chicago/Oak Brook		● 1987, 1996, 2009, 2010
La Grange	●	
Springfield	●	
Techny	●	
<b>Indiana</b>		
Ferdinand	●	
Indianapolis	●	● 2011
South Bend	●●	
<b>Iowa</b>		
Des Moines	●●	
Dubuque	●	

State	CONSULT	CONVOCAION
<b>Kentucky</b>		
Maple Mount	●	
<b>Louisiana</b>		
Baton Rouge	●	
Lafayette	●	
New Orleans		● 1994
Shreveport	●●	
<b>Maine</b>		
Portland	●	
<b>Maryland</b>		
Baltimore		● 1992, 2021, 2023
St. Paul		● 1991
<b>Michigan</b>		
Detroit	●	
Kalamazoo	●●	
<b>Massachusetts</b>		
Springfield	●	
<b>Missouri</b>		
St. Louis	●●	● 1989, 2007
O'Fallon	●●	
<b>New Mexico</b>		
Albuquerque		● 1993, 2022
<b>New York</b>		
Niagara Falls		● 2018
Syracuse	●	
<b>Ohio</b>		
Cincinnati		● 2004
Columbus	●	● 1995
Toledo	●	

State	CONSULT	CONVOCAION
<b>Oklahoma</b>		
Oklahoma City		● 2016
<b>Oregon</b>		
Portland	●	
<b>Pennsylvania</b>		
Philadelphia		● 1988
Pittsburgh		● 1995
Scranton	●	
<b>South Carolina</b>		
Greenville		● 2015
<b>Tennessee</b>		
Nashville		● 2017
<b>Texas</b>		
Beaumont	●●●	
Dallas	●	
Fort Worth		● 1998
San Antonio		● 1995, 2019
<b>Wisconsin</b>		
Green Bay	●●	
<b>El Salvador</b>		
San Salvador (CRISPAZ)	●	
<b>Virginia NACPA National HQ</b>		
Alexandria	●	
2121 Eisenhower Avenue		
Suite 200 Alexandria, VA 22314		
<b>CANADA Ontario</b>		
Toronto		● 1988

# NACPA CONSULTATION SERVICES



*Complex times call for the proven expertise, compassion and moral compass of colleagues and leaders from your trusted professional association.*



NACPA is ready to support you and your organization during this challenging time.

**We can offer strategic guidance as you navigate:**

- Furloughs
- Job consolidations
- Reorganizations
- Pay freezes
- Salary structure changes
- Assistance with returning to the workplace
- Diocesan clergy personnel handbook development and reviews
- Personnel policies and procedures handbook and reviews

**Once you are ready to move forward, we can help by:**

- Reviewing the HR strategy and compensation philosophy and making suggestions for better alignment with the changing environment
- Examining the HR program and recommending ways to improve/simplify processes

- Providing tools for managing pay and pay structures
- Conducting internal pay equity analyses through a *Just Treatment* lens

**NACPA has other services that you may need:**

- Development and updates of compensation systems
- A review of compensation and benefits programs
- Administrative and organizational audits
- Priests' and religious institutes' human resources services
- Training for those with HR responsibilities at the local level
- Human resources management training

**CONTACT US**

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# A Brief History of the National Association of

## 1971–1974

The National Federation of Priests Councils (NFPC) established the association as a personnel group, with the initial plan that it would serve priests. Rev. Dan Johnson was named chairperson. The first meeting was held at the Waldorf Astoria in New York and women were present—as observers. By 1972 a Constitution Committee was organized, led by Sister Elizabeth Mulholland and Rev. Jack Kinsella. The NACPA name was chosen and a decision was made to include all those working in personnel. Rev. Johnson of Hartford became the first president.



*The Waldorf Astoria in New York, site of the first NACPA meeting.*

## 1975–1979



*A familiar dilemma was echoed in the Cincinnati convocation theme: "Limited resources: human and financial."*

Rev. Jack Catoir became president through 1978 when Rev. Phil Sehir assumed the position. The 1976 convocation theme resonates to this day: "Limited Resources: Human and Financial." The 1979 national meeting was held in the Greater Cincinnati area and the theme was far-reaching: "Toward the Year 2000." Membership was 488.

## 1980–1984

In 1980 the president was Rev. Joe Graffis and the convocation explored "Bridge Builders and Prophets." Sister Elizabeth Cashman S.D., was president for the 1981 meeting in Milwaukee and Sister Mary Ann Barnhorn, SNDdeN, was executive director. During this timeframe it was clear that members of the laity were growing in NACPA's numbers. Membership was now at 678. The 1984 convocation held in Boston marked a shift to a national perspective and agenda.



*In Boston the agenda turned to a national perspective.*

## 1985–1989

Bishop Tom Costello served as the Episcopal Liaison and Sister Chris Matthews, OP, was executive director. The convocation themes during

this period included "Multicultural Gifts," "New Wine, New Wineskins," "Stewardship: The Meeting of Gospel and Management," "Just Treatment: Vision and Reality" and "Personnel Ministry: Open to the Future." In 1989 the new Episcopal Liaison was Bishop Robert Brom and membership topped 1,000.

### Multicultural Gifts

**Just Treatment:  
Vision and Reality**

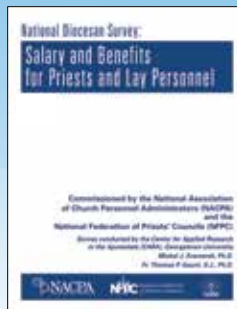
**Personnel  
Ministry:  
Open to  
the Future**

**Stewardship:  
The Meeting  
of Gospel and  
Management**

**New Wine, New Wineskins**

## 1990–1994

The first Diocesan Salary Survey was conducted in 1990 and in that same year a meeting with the bishops explored emerging personnel issues. The convocation themes ranged from diversity to leadership and justice—to opportunities for the year 2000 and beyond. Sister Patrice Hughes, SC, served as director of program services and exhibits were now featured at the convocation. In these years, NACPA criss-crossed the country, with meetings in Los Angeles, St. Paul, Baltimore, Albuquerque and New Orleans.



## 1995–1999



*Rev. Edward T. Pratt, former staff member in the 90s and Association President in 2018.*

Parish job descriptions and pay manuals were developed. Rev. Edward T. Pratt served in the national office as a human resource consultant. The laity now dominated membership. In 1996 the 25th anniversary celebration was held in Chicago. In 1998, the first Vision Award was presented to Colleen Branagan and the next year that honor went to Msgr. Colin McDonald. The mission statement was revised and a Performance Appraisal Manual was developed. In 1999 the convocation held its first gathering outside the U.S., convening in Toronto.



*Chicago was the 1998 convocation site.*

## 2000–2004



*Bishop David Zubik set a record, serving as Episcopal Moderator for 17 years, 2001-2018.*

"Liberty with Justice" was the theme for the Washington, D.C., convocation in 2000. Bishop David Zubik was named the Episcopal Liaison—a position that he held for 17 years. The convocation met in Orlando in 2002. Carol Fowler was the new president. The NACPA Leadership Award was bestowed on The National Pastoral Life Center. The association created Standards for Workplace Justice.

## 2005–2014

The convocation moved to Los Angeles in 2005 and by 2006 it was back in the Midwest—just in time to celebrate NACPA's 35th anniversary in St. Louis. During these years, membership ebbed but enthusiasm and support among key members propelled the association forward. Dr. Mary Jo Moran was named the sixth Executive Director in 2005, following Sister Ellen Doyle, OSU, who had served the organization since 1998. Dr. Moran was the first lay person to hold the position.



*NACPA celebrated its 35th anniversary in St. Louis.*



# Church Personnel Administrators

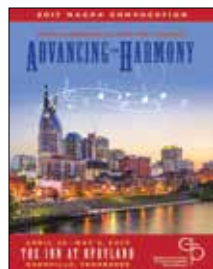
## 2015–2017

In 2015 the Board of Directors named Dr. Regina Haney as the new Executive Director. Dr. Haney previously had served for 25 years as an Executive Director with the National Catholic Educational Association (NCEA), the largest professional education association in the world. The Board also relocated NACPA to the Greater Washington D.C., area.

In 2016, a new website premiered. A joyful 45th anniversary was held in Oklahoma City, where Terry Robinson was the recipient of the Vision Award. In the 2016/17 academic year, NACPA launched its first webinar series to virtually engage and educate members and other supporters.



*Dr. Regina Haney became the new Executive Director.*



*Nashville was the 2017 convocation site.*

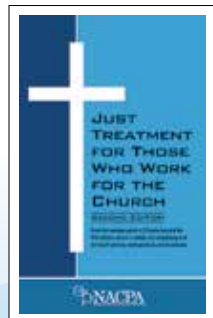
Nashville was the site of the 46th convocation in 2017 and Msgr. Patrick Pollard received the Vision Award. Another highlight was the publication of the *National Diocesan Survey: Salary and Benefits for Priests and Lay Personnel* in partnership with the National Federation of Priests Councils and facilitator, Georgetown University's Center for Applied Research in the Apostolate.

## 2018–2019

Niagara Falls in the Diocese of Buffalo was the site of the 2018 convocation. Carol Fowler received the Vision Award and Archbishop Gregory Aymond, Bishop of New Orleans, became the Episcopal Moderator. The Certificate Program for Those Moving from Secular to Church HR Responsibilities was launched. It has become an important initiative in strengthening current and future HR leaders in our Church.

Focusing on the strategic plan and responding to member surveys and recommendations, NACPA moved forward in 2019. San Antonio played host to the convocation. New awardees were saluted for their vision, leadership and service to NACPA. Ed Isakson was the recipient of the Vision Award. An additional honor recognized those who created the Certificate Program.

*Just Treatment for Those Working in the Church* was the centerpiece of the year's accomplishments. Thirty-three years after its first



publication, this new edition continues to be a vital resource that has been acclaimed by Church leaders. A new Study Guide has made it even more accessible for parish and diocesan use.

Thanks to Board members committed to growing the membership, new recruits were added in several arch/dioceses. The third season of the webinar series premiered with a fifth presentation added. Consultation services were expanded, with seasoned new consultants joining our highly respected team.



*Chicago was the 1998 convocation site.*

## 2020–2022

2020 proved a challenging year due to the pandemic. The convocation scheduled in Albuquerque was postponed until 2022. However, the association designed a Virtual Exhibit Hall (VEH) to help members network with each other and 20 vendors. NACPA's own virtual exhibit emphasized the association's consultation services and connected attendees with consultants. The webinar series continued to draw a wide audience—and live on the website for future reference. The association persisted in forging new relationships and strengthening others. Members were sent a prayer card as a sign of unanimity during the complex times. The Listserv revved up as members sought counsel and support.



In 2021 the association introduced NACPA OnDemand for Today's Church HR Issues. The program has supported members as they have addressed ever evolving issues in the workplace. The Archdiocese



*Bishop Edward J. Weisenburger*



*Mary Santi was honored with the 2022 Vision Award.*

of Miami partnered with NACPA to create Introduction to HumanResources in the Church Workplace, a six-week course providing a foundation knowledge base for parish and school employees. NACPA moved forward to create a vibrant virtual convocation with a live opening prayer service with Archbishop William E. Lori at the Basilica of the Assumption. NACPA's new episcopal moderator, Bishop Edward J. Weisenburger, Bishop of Tucson, gave the closing prayer.



*Maureen Fontenot, NACPA 2021 Vision Awardee.*

2022 NACPA continued a year-long celebration of its founding 50 years ago. The Archdiocese of Santa Fe hosted its convocation with the theme: *Taking it To New Heights: Justice in the Workplace.*



# Taking it to New Heights: JUSTICE IN

## Association Leadership

### THEN AND NOW

#### NACPA Presidents

Year Term Began	Name
1971	Rev. Daniel Johnson (Coordinator) Rev. Patrick Sullivan, CSC, (Coordinator)
1974	Rev. Daniel Johnson
1975	Rev. Jack Catoir
1978	Rev. Phillip Seher
1980	Rev. Joseph Graffis
1981	Sr. Elizabeth Cashman, SC
1982	Sr. Barbara Garland, SC
1983	Rev. George Crespín
1984	Rev. David McDonald
1985	Sr. Sheila Kelly, GNSH
1986	Mr. Eugene Hackbarth
1987	Rev. J. Cletus Kiley
1988	Sr. Elizabeth Wendeln, SCN
1989	Rev. Donald Thimm
1990	Deacon William Umphress
1991	Mrs. Mary Kessler
1992	Mr. Thomas P. Schroeder
1993	Rev. Robert J. Bussen

Year Term Began	Name
1994	Mr. William J. Coy
1995	Sr. Frances Schumer, ASC
1996	Mrs. Charmaine Williams
1997	Rev. Kevin Spiess
1998	Mrs. Linda Bearie
1999	Ms. Kathleen Theriot
2000	Rev. Paul A. Jaroszeski
2001	Ms. Carol Fowler
2003	Mr. Thomas P. Conklin
2005	Ms. Diane Bach
2008	Sr. Joyce Soukup, SSJ-TOSF
2010	Ms. Terry Robinson
2012	Msgr. Patrick Pollard
2014	Ms. Terri Wilhelm
2016	Ms. Maureen Fontenot
2018	Rev. Edward T. Pratt
2020	Elizabeth Allen

#### NACPA Episcopal Liaisons and Moderators

Year Term Began	Name
1976	Bishop P. Francis Murphy
1980	Bishop Kenneth Angell
1986	Bishop Thomas J. Costello
1989	Bishop Robert H. Brom
1992	Bishop John F. Kinney
2001	Bishop David A. Zubik
2018	Archbishop Gregory M. Aymond
2021	Bishop Edward J. Weisenburger

#### NACPA Executive Directors

Year Term Began	Name
1978	Sr. Sheila McEvoy, SNJM
1981	Sr. Mary Ann Barnhorn, SNDdeN
1985	Sr. Christine Matthews, OP
1992	Sr. Ann White, SL
1998	Sr. Ellen Doyle, OSU
2005	Mary Jo Moran, PhD, SPHR
2015	Regina Haney, Ed.D.

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For more information contact  
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# WELCOME TO NACPA 2023

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Archbishop Wester was installed as the 12th Archbishop of Santa Fe on June 4, 2015, in the Cathedral Basilica of St. Francis of Assisi in Santa Fe, NM.



Photo credit: Celine B. Radigan

The Archdiocese of Santa Fe sends warm greetings to the National Association of Church Personnel Directors and all its members, sponsors and exhibitors attending its 51st convocation.

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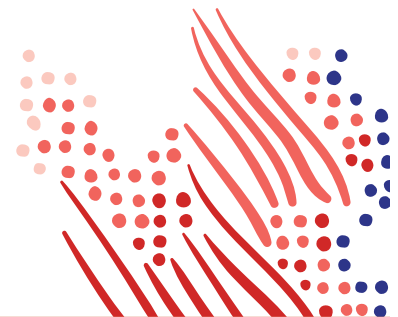
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## Let's Move: Health Break

### 1. Just stand up and sit down – no hands

You might have gotten a gold star in preschool for sitting still, but it just goes to show you (best sellers notwithstanding) that not all of us learned everything we need to know in kindergarten. If you stand up and sit down (over and over)—without using your hands—it can be a challenge. Do it while you're on the phone; no one will know.

### 2. Shrug your shoulders – to release the neck and shoulders

Inhale deeply and shrug your shoulders, lifting them high up to your ears. Hold. Release and drop. Repeat three times.

Shake your head slowly, yes and no. You might as well amuse yourself while you do it to relax even further. Ask yourself silly questions: "Is your boss an idiot?" Move your head up and down, "Yes, yes, yes." Side to side: "No. No. No." (Shedding tension is as much mental as physical.)

### 3. Loosen the hands with air circles

Clench both fists, stretching both hands out in front of you.

Make circles in the air, first in one direction, to the count of ten.

Then reverse the circles.

Shake out the hands.

### 4. Do leg extensions – work the abs and legs

Grab the seat of your chair to brace yourself and extend your legs straight out in front of you so they are parallel to the floor.

Flex and point your toes five times. Release.

Repeat.

<https://www.webmd.com/fitness-exercise/features/stretching-exercises-at-your-desk-12-simple-tips>

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# Notes

# Notes

## Session Locations



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at old town



## NACPA Convocation 2022: Schedule at a Glance

<b>SUNDAY, MAY 1</b>			
1:00 – 4:00 p.m.	Exhibit set up		
2:00 – 4:00 p.m.	Registration <b>Location: Exhibit Hall</b>		
3:00 p.m.	New Members Orientation <b>Location: Fireplace Room</b>		
5:00 – 6:00 p.m.	OPENING LITURGY <b>Location: Chapel of the Hotel Albuquerque</b> ARCHBISHOP JOHN C. WESTER and BISHOP EDWARD J. WEISENBURGER		
6:00 – 7:00 p.m.	Welcome and Happy Hour <b>Location: Pavilion/Gardens</b>		
<b>MONDAY, MAY 2</b>			
7:00 – 8:30 a.m.	Continental Breakfast <b>Location: Exhibit Hall</b>		
8:00 – 8:30 a.m.	Morning Prayer <b>Location: Alvarado D</b>		
8:30 a.m. - 10:15 a.m.	<b>Plenary Session: Chris Lowney — Taking it to New Heights: Become the Spiritual Leader You Always Wanted to Be</b> <b>Location: Alvarado D</b>		
10:15 – 11:30 a.m.	BREAK <b>Location: Exhibit Hall</b>		
11:30 a.m. – 1:00 p.m.	<b>Four Concurrent Breakout Sessions</b>		
	The Ministerial Exception, Religious Exemptions, and Employees in 2022 - Jennifer Gniady <b>Location: Alvarado A</b>	Law & Compliance	
	Manage Generational Differences in the 21st Century Workplace by leveraging your HRIS data - Sarah Fogler <b>Location: Alvarado B</b>	Future Workplace	
	Performance Reviews in a Flexible Workspace - Annabelle Baltierra & Kim O'Donoghue <b>Location: Alvarado C</b>	Future Workplace	
	Let's Talk Diversity While Protecting Our Ministry Bob Roper & Chris Hagen <b>Location: Fireplace Room</b>	HR Management	
1:00 – 2:30 p.m.	Member Lunch/NACPA Meeting <b>Location: Franciscan</b>		
2:30 – 2:45 p.m.	BREAK		
2:45 – 4:15 p.m.	<b>Four Concurrent Breakout Sessions</b>		
	Understanding the Living Wage - Shannon Drohman and Kathy Marek <b>Location: Alvarado A</b>	Law & Compliance	
	Hiding in Plain Sight: Your Employee Assistance Program - David Shellenberger <b>Location: Alvarado B</b>	Wellness and Spirituality	
	HR and Marketing — Driving Culture as Critical Thought Partners - Buffy Blanton & Terry Arya <b>Location: Alvarado C</b>	Future Workplace	
	Personnel Investigations - Ricardo Serrano <b>Location: Fireplace Room</b>	HR Management	
4:15 – 4:30 p.m.	Speaker Chats		
5:00 – 5:30 p.m.	Thank You Santa Fe Wine Tasting <b>Location: Exhibit Hall</b>		
<b>TUESDAY, MAY 3</b>			
7:00 – 8:30 a.m.	Breakfast <b>Location: Exhibit Hall</b>		
8:00 – 8:30 a.m.	Morning Prayer <b>Location: Alvarado D</b>		
8:30 a.m. - 10:15 a.m.	<b>Plenary Session: Kim Daniels — Faith in Action: The Catholic Church and Public Policy</b> <b>Location: Alvarado D</b>		
10:15 – 11:30 a.m.	BREAK <b>Location: Exhibit Hall</b>		
10:20 a.m.	Book Signing by Chris Lowney <b>Location: Exhibit Hall NACPA Talbe</b>		
11:30 – 1:00 p.m.	<b>Four Concurrent Breakout Sessions</b>		
	OSHA Regulatory Compliance and Response - Jeff Harrison <b>Location: Alvarado A</b>	Law & Compliance	
	Highlights of the 2022 Diocesan Salary Survey - Beverly Escamilla <b>Location: Alvarado B</b>	HR Management	
	Why HR Matters in Parishes and Schools: A case study on developing a "Field training" - Sarah Fogler <b>Location: Alvarado C</b>	HR Management	
	Leading Differently in this Future Workplace – It is Here and Now. A Roadmap of HR Best Practices for Employee Recruitment & Retention - Kevie Mikus <b>Location: Fireplace Room</b>	Future Workplace	
1:00 – 2:30 p.m.	Free Time, Lunch not provided		
2:30 p.m.	Exhibit Hall Closes		
2:30 – 4:00 p.m.	<b>Four Concurrent Breakout Sessions</b>		
	The New World of ACA Compliance - Here to Stay - Keith Pelatowski <b>Location: Alvarado A</b>	Law & Compliance	
	Coaching and Mentoring (yourself and others) - Bob Roper <b>Location: Alvarado B</b>	HR Management	
	Retirement Plans: New Best Practices - Mike Levin <b>Location: Alvarado C</b>	Future Workplace	
	Leading Like Jesus: Living the Gospel When Managing Human Resources - Christopher Antone <b>Location: Fireplace Room</b>	Wellness and Spirituality	
4:00 – 4:15 p.m.	BREAK / Speaker Chats <b>Location: Exhibit Hall</b>		
4:15 – 5:45 p.m.	<b>ROUND TABLES (HOT TOPICS)</b>		
	• Religious liberty's threats to health plans <b>Location: Alvarado A</b>		
	• How to incorporate mission and values into the daily workplace <b>Location: Fireplace Room</b>		
	• How to navigate a pay structure to meet the needs of the time: paid time off; flex time; remote working; workforce retention, etc. <b>Location: Alvarado C</b>		
	• Leading with empathy: What it is and why it is important <b>Location: Alvarado B</b>		
5:45 – 6:30 p.m.	BREAK		
6:30 – 7:00 p.m.	Social <b>Location: Franciscan</b>		
7:00 – 9:00 p.m.	Closing Awards Banquet <b>Location: Franciscan</b>		

**Convocation Adjourned — Thank You! — See You in 2023!**

**NACPA**

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