

# **BEST PRACTICES FOR PARISH ADMINISTRATIVE ASSISTANTS**

**A Handbook for Clerical Staff and Office Volunteers**



**DIOCESE OF ST. PETERSBURG, INC.  
OFFICE OF THE CHANCELLOR  
2021**



**COURAGEOUSLY**  
*Living the Gospel*

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## ACKNOWLEDGEMENTS

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- The many Parish Administrative Assistants, Office Managers and Receptionists who offered valuable feedback and resources, which have helped to shape this manual.
- The following Pastoral Center departments of the Diocese of St. Petersburg:
  - Office of the Chancellor
  - Human Resources Office
  - Office of Archives and Records Management
  - Finance and Accounting
  - Stewardship and Development

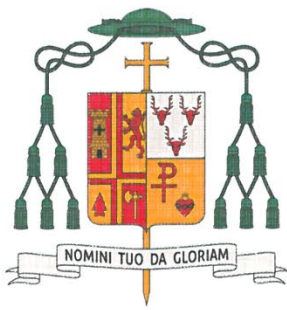
May the wisdom offered by those of you who experience parish life on a daily basis be of great help to those who will follow in the years to come!

Thank you for the gifts and talents you bring to your parishes and to the Diocese of St. Petersburg. Your tireless service and love for God's people help to make the Church a "light to the world."

***"Do not neglect hospitality, for through it some have unknowingly entertained angels." – Hebrews 13:2***

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# DIOCESE OF ST. PETERSBURG

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May 2021

Dear Friends in Christ,

When the last diocesan Administrative Assistants' Professional Day was offered in March 2017, I had only been in the Diocese of St. Petersburg for about three months.

Since then, I have become more familiar with our pastors, priests, deacons, religious women and men, and the hundreds of lay staff members and volunteers who are instrumental in making our parishes and Catholic schools places where visitors feel welcome. I am especially grateful for the dedication you have shown to parishioners and to all who seek healing and direction from the Church.

Some of you reading this letter work as parish bookkeepers and business managers. As one who has a background in finance, I greatly appreciate the level of precision required by your profession. The care of temporal goods is as much a ministry as is catechesis, youth ministry and the ministry of communion to the homebound.

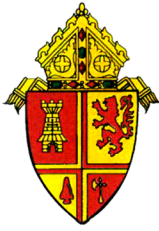
As a former parish pastor, I am aware that the work done by office clerical and business staff often goes unrewarded. Yet, I'm sure that you are not motivated by recognition but by the opportunity to serve Christ in those you encounter, whether they are pleasant or difficult to deal with.

Since 2018, our diocesan vision has been ***Courageously Living the Gospel***. The pandemic of this past year has provided you with many opportunities to be even more courageous in your service to the people of God. The way that you have stepped up to this challenge has been nothing short of heroic.

Thank you for your welcoming presence to those who visit your parish offices and churches. Please be assured of my ongoing prayers for you and for the communities where you serve. With gratitude and best wishes, I am

Sincerely yours in Christ,

Most Reverend Gregory Parkes  
Bishop of St. Petersburg



## DIOCESE OF ST. PETERSBURG

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May 2021

Dear Sisters and Brothers in Christ,

It has been four years since the Diocese of St. Petersburg last offered a professional day specifically for administrative assistants, office managers and receptionists. Our event in 2017 was not only well-received, but it led to many new friendships and networks, allowing those who were new to parish ministry to feel a bit less intimidated and more confident in their roles.

My predecessor, Mrs. Joan Morgan, herself a former parish administrative assistant, was instrumental in the development of our last professional day, and her legacy continues on in the women and men, laity and clergy she mentored in her 35 years of service to our Diocese. I am hopeful that the Chancellor's Office, along with other Pastoral Center offices, will be able to continue our support of you and your colleagues through various workshops and presentations for years to come.

Much like our last gathering in 2017, this year's Administrative Assistants' Professional Day was developed as a result of a survey in which many of you participated, sharing your desires and interests in topics of relevance to you and those you serve in the parish.

This handbook is a compilation of ideas provided by parish staff members, as well as Pastoral Center employees. I hope that it will be a helpful tool for you and for those who will follow you. Please feel free to add some extra "chapters" to this handbook, as you learn more great ideas that can be incorporated in your daily ministry.

Thank you for the excellent way in which you serve your pastors, clergy, staff members, parishioners and visitors to your parish. May the Lord "who began a good work in you be faithful to complete it until the day of Christ Jesus" (Philippians 1:6).

In Christ's Service,

*Deacon Rick Wells*

Deacon Rick Wells, J.C.L.  
Chancellor

## I. Professional Attributes of Administrative Professionals

Those who responded to our request for “best practices” were unanimous in their agreement that the following attributes are indispensable for administrative assistants and receptionists:

- Punctuality: Show true dedication to your job by arriving on time or even a few minutes early.
- Dependability: Be a person of your word, following through on responsibilities entrusted to you.
- Humility: Carry out tasks joyfully, without a desire for recognition.
- Professionalism: Conduct yourself in a way that puts the parish and its pastor in the best possible light.
- Alertness: Pay careful attention to what is happening around you and be prepared to assist others on staff and those who visit the parish office. Also be alert to signs of potential conflict or danger.
- Attire: Dress appropriately, based on parish and diocesan guidelines. Each parish should have an employee handbook. How we dress has a direct impact on our demeanor and whether we take our work seriously.
- Friendliness: Always be mindful that you are representing your parish. Everyone who walks in should be greeted with a smile. If you know the person’s name, use it when greeting him/her.
- Consideration: Be protective of the pastor’s time. Most pastors keep appointment schedules, which might limit their ability to meet with those who simply “drop by.” Please find out in advance how the pastor prefers to handle such situations.
- Organization: Think ahead and plan accordingly. It is helpful to look at the parish calendar and to speak with other staff members in order to determine whether you might be handling more phone calls or mailings than usual.
- Compassion: Be sensitive in time of need. This applies both to other staff members and to those who visit the parish office.
- Gratitude: Staff members should show appreciation whenever possible to volunteers. They are vital to the success of any parish. Solicit feedback from them.
- Charity: Gossip and mean-spirited comments have no place in a church office. Words should be used to build up others, not to destroy them.

## II. Recommended Desk Items for Administrative Professionals

We received a significant number of suggestions concerning which items should be readily available for secretaries and receptionists. Depending on the size of your workspace, you might wish to consider the following:

- Name tags for all employees and volunteers who staff the receptionist's desk. Depending upon the size of your parish and office staff, name tags might be helpful for all employees.
- Information binder containing:
  - Instructions for use of telephone and voice mail.
  - Telephone listings by name and listing order.
  - An updated FAQ (frequently asked questions) list and extensions where callers should be referred.
  - A calendar of events for the current and following months.
  - Copies of last week's and this week's bulletins. The bulletin contains approximately 70% of the answers to commonly asked questions.
  - A resource list with business cards and contact info for those who request financial assistance. Extra copies should be available for visitors.
  - Information from our diocesan Safe Environment Program office and contact information for our diocesan Victim Assistance Minister.
  - A list of 911 call procedures in case of emergencies.
  - Tips for dealing with difficult people.
  - An organizational chart by ministry with names and extensions.
- Schedule of staff, especially those who are out of the office on a particular day.
- Tissues and hand sanitizer
- Sign-in sheet for visitors (if applicable), pad and pens.
- Alcohol wipes for phone and computer keyboard.
- Panic button to be used when assistance is needed, if available.
- Parish Office Procedures Book, if your office has one. If not, it would be wise to develop one, in conjunction with the pastor and other staff members.

### III. Directions for Completing Various Forms and Books

The following instructions might be helpful for those who are learning how to complete the following parish forms and books. Please be certain that writing on all forms and in parish books is legible:

- Funeral Forms
  - Indicate name of deceased, date of death and date of service.
  - Include name and contact information for family members.
  - Write in name and contact number of the funeral home handling the arrangements.
- Baptism Forms
  - Child's name and date of birth.
  - Parents' names.
  - Godparents' names, religion (At least one must be Catholic. A baptized non-Catholic Christian can be included as a witness to the baptism, provided that a Catholic godparent is present. Also, only one male or one female godparent or one of each).
  - Requested date of baptism.
  - Date of baptism preparation class chosen.
- Mass Stipend Books and Mass Cards
  - Fill in name of person(s) for whom the Mass is intended.
  - Fill in name of person requesting the Mass intention.
  - Indicate whether Mass Stipend has been paid and amount of stipend.
  - Fill in Mass date information and intention on Mass card and give to donor.
  - If someone requests a Mass, first check to see if they prefer a specific date. Then, check to verify whether the date is available. If not, look at other possible dates but do not change any Masses that are already reserved.
  - Pastors may permit more than one request at the same Mass with consent of the families/individuals involved, however this should not be done more than two times per week. Most pastors prefer only one intention (individual or family) per Mass. Changes should only be made by the secretary.
  - Some parishes also offer unannounced Masses. These are usually offered as available but no specific date is provided.
- Sacramental Registers
  - Our diocesan *Sacramental Records Handbook* contains instructions for correctly completing the various sacramental books.
  - Our new diocesan Parish & School Records Management Policy carefully outlines schedules for retention and destruction of records.



#### IV. Tips for Answering the Telephone

How you answer the telephone and your tone of voice can either be inviting or repelling. Below are some best practices for answering the parish phone:

- Answer the phone with a smile and say, “Good morning/afternoon.” Your smile can be detected in the tone of your voice. Then, identify your church and your first name and ask “How may I direct your call?”
- A personal touch is best: Except for after parish hours, phones should always be answered by a live person.
- Long calls: If you are handling a rather lengthy call, let your colleague know that you will be on a call for the next 15 minutes or so. This will allow him/her to pick up other calls.
- Placing calls on hold: If you must place a caller on hold, please do so no more than twice. Also, please avoid placing the caller on hold for more than 60 seconds. If necessary, take their number and call them back.
- Transferring: When transferring calls, make sure you let callers know where you are transferring them. If you are transferring a call to a staff member’s voice mail, let the caller know that you are doing so and inform him/her if the staff member is out of the office.
- Finding answers: If you do not have an answer to a caller’s question, take down his/her name and number and return the call as soon as you have an answer.
- Give only necessary information to incoming callers, such as “She is unavailable right now. Could I take your name and number and have her return your call when she is available?”
- Automated messages: Make sure that your parish office voice message is up to date. Special messages that are specific to holidays should be changed immediately after the holiday.

## V. Appropriate Interaction with Visitors

Visitors are a regular part of ministry in the parish office and visits should be viewed as opportunities for service rather than burdens. The following best practices will help to make visitors' experiences at your parish more positive:

- Greet all visitors as soon as they enter. Let them know that you will be right with them if you are busy.
- Present a welcoming attitude. Some visitors may have been away from the Church for a long time. It is a golden opportunity to evangelize when someone is returning to arrange a baptism, wedding or funeral.
- Speak calmly and avoid raising your voice. It is more calming to an upset visitor if you speak gently. Let them know you are sorry about their situation and will do your best to assist.
- Follow up with staff if a visitor is waiting more than 10 minutes for a meeting.
- Be willing to listen but know how to carefully draw a long conversation to a close.
- Create a welcoming environment: Make sure that the waiting area in the parish office is hospitable. A well-kept area is more inviting than one that has been neglected.
- Non-English speakers: Unless you can communicate with those who speak Spanish or other non-English languages, have access to a staff member or a parish volunteer whom you can contact when a non-English-speaker requests assistance.

## VI. Confidentiality and Other Office Protocols

In the Church, we often find ourselves dealing with confidential matters. People may trust us with very personal information. We act professionally and respectfully when we honor the confidentiality of the matters entrusted to us. Below is a series of protocols regarding confidentiality and the handling of other common office tasks:

- Discretion must be exercised when visitors are in the waiting area and you are discussing confidential matters.
- Show patience and flexibility, particularly if a visitor needs you to listen even though you are working on a project.
- Handling multiple calls should be done calmly and without showing frustration or annoyance. “May I place you on hold?” “Thank you so much for holding. How may I help you?”
- Papers and forms: Treat all papers, folders and forms as confidential material.
- Be the face of Christ. You are the first face of the Church many people will see.
- Parish bulletins: Have a system in place where at least two people proofread the bulletin before it is transmitted to the publishing company.
- Baptism requests: Have contact information for baptism preparation readily available.
- Exercise careful security, making sure that office doors which need to be locked are secured and access is limited to authorized personnel.
- Professional environment: The office area is not a gathering place. People should be kindly encouraged to take care of business and move on.
- Introducing visitors: Be sure to tell employees when a visitor has arrived and offer to bring him/her to the employee, if needed.
- Requests for financial assistance: If a visitor has come for assistance from the St. Vincent de Paul Society, ask kindly if they were referred by an SVDP volunteer. If not, give them a business card with contact number and ask them to call.
- Referrals: Have a listing of referrals, including mental health counselors, professionals and charitable organizations, which you can give to individuals who might require assistance.

## **VII. Best Methods for Handling Distraught or Difficult Individuals**

- Speak calmly to angry visitors. Listen to understand the reason for their anger.
- Utilize support persons: If possible, have one or more staff members available who can speak with distraught individuals, as needed.
- Restricted entry: As a last resort, you might need to discuss with the pastor those visitors who display harassing behavior, to determine whether they should be prohibited from entering the parish office.
- Emergency contacts: Have an emergency contact list ready in the event that an individual becomes out of control.

## VIII. Other Suggestions from Parish Staff Members

- Parish registration: Have dedicated times on the weekend when newcomers can register. This reduces the need to come into the office during the week. Making online registration available is also a great time-saver.
- Messages: Make sure you write down messages correctly on the message pad. Printing shows up more clearly than cursive. Include the date, time and to whom the message is directed.
- Sick Calls: Calls requesting the Anointing of the Sick are the most important calls which require immediate attention. Your job is to let the priest know what has been requested.
- Priest listing: Keep a listing of retired priests and other priests on call, when help is needed.
- Bulletin information: Make sure that your volunteers read the weekly bulletin to know what's happening in the parish.
- Prayers of the Faithful: When listing names of individuals for whom Masses are offered, make sure to spell out the names phonetically, if needed, so that they can be more easily pronounced by the deacon or reader.
- Desk coverage: Cover the desk at all times and avoid leaving the desk area unless you have someone who can cover your station.
- Emergency numbers: Make sure that all emergency phone numbers are posted near the phone.
- Helpful information: Act as a resource person, maintaining and providing available literature and contact information for those in need.
- Opening and closing: Assist in the opening and closing of the office, unless another staff member maintains responsibility for this.
- Only authorized persons are permitted behind the desk. Determine who should have access to the receptionist's desk.
- Security: As part of your responsibilities, you also serve a security function, ensuring that visitors are escorted at all times throughout the building.
- Staff meetings: Please be present and on time at all staff meetings when you are required to attend.
- Rumors: Avoid being part of the "rumor mill." Your job is to provide accurate information. If you are uncertain about information, please do not pass it on.
- Unexpected situations: There will be times when emergency situations will arise while you are working. Calm thinking and quick action are important factors in dealing with such situations.

- Fire alarms: If you are working at the desk and a fire alarm sounds, do not attempt to determine whether the alarm is real or false. Merely close the office area and leave the building.
- Obscene or threatening phone calls: Contact your supervisor immediately.
- Medical emergencies: All medical emergencies should be reported to your supervisor. In cases of severe medical emergencies, it may be necessary to call 911.
- Handling Mail: If you are given responsibility for sorting incoming mail, please distribute it into the appropriate mail slots. Staff members will pick up their own mail. They are also responsible for their own outgoing mail.

## IX. Training of Volunteers

Well-trained, all-volunteer receptionist staffs are a benefit to the parish, particularly if they are parishioners, since they have an investment in the parish. Also, there can be a significant savings to the parish by recruiting volunteers for this responsibility. The following ideas should be considered when training volunteers:

- Application forms with time slots should be available so that potential volunteers can indicate their availability.
- Welcome letter: Have a welcome letter to new volunteers, along with a packet of instructional materials.
- Prayer: A simple prayer for patience and kindness should be visible so that the volunteers can be reminded to pray before beginning their work.
- Guidelines/Mission Statement: Include a listing of guidelines which all volunteers are expected to follow. A very simple to remember Mission Statement would also be beneficial (Example: “Christ is present in every visitor”).
- Promptness: Volunteers should be prompt in arriving for their assigned hours. When unable to work, they should make arrangements to have their shifts covered.
- Hospitality: Training your volunteers to show hospitality and a caring presence toward visitors and others will help to create a warm office environment.
- Training: Regularly scheduled training sessions, arranged at various times of the year would be preferable. This would reduce the time demand on staff members.
- Absences/substitutes: Train the volunteers to arrange for their substitutes whenever they are unable to show up for their shifts.
- Phones: Volunteers should be thoroughly trained on the parish’s phone system.
- Mass requests: Proper handling of Mass stipends and requests is important.
- Security details: Outline security measures for those times when the receptionist or secretary will be alone in the office.
- Answering system reminder: Keep handy a reminder to set the phone system to “after hours” mode (if applicable).
- Breaks: Procedures for lunch breaks and other breaks during the day will help to alleviate any gaps in front desk coverage.

- Copying: Making copying procedures available will prove helpful for volunteers. If possible, it is best that ministry volunteers submit materials to be copied in advance, especially since other copying jobs might already be in progress.
- Flower donations: If your parish accepts offerings for sanctuary flowers, a sheet with information on the donor, the intention and the amount paid should be available at the front desk.
- Funeral requests: Either the parish secretary or another staff member is typically contacted to handle funeral requests. A contact number in the event of his/her absence should be available to receptionists.
- Contact information: Unless an employee or ministry leader has given permission, do not give his/her number out to those inquiring about events or ministries.
- **Most importantly, staff members should show appreciation toward volunteers whenever possible!**



## **X. Helpful Articles for Office Staff Members**

### **From the Holy Father**

Pope Francis [...] used a more modern example by describing an encounter of a young couple with a parish secretary. ““Good morning, the two of us - boyfriend and girlfriend - we want to get married,”” the couple says.

“And instead of saying, ‘That’s great!’ They say, ‘Oh, well, have a seat. If you want the Mass, it costs a lot ... .’ This, instead of receiving a good welcome – ‘It is a good thing to get married!’ – But instead they get this response: ‘Do you have the certificate of baptism, all right ... .’ And they find a closed door,” the Pope said.

He described the situation as one where a “Christian has the ability to open a door, thanking God for this fact of a new marriage” but instead the secretary controlled the faith when it was possible to have facilitated the couples’ faith. “There is always a temptation,” he said, “to try and take possession of the Lord.”

“Think about a single mother who goes to church, in the parish and to the secretary she says: ‘I want my child baptized.’ “And then this Christian, this Christian says: ‘No, you cannot because you’re not married!’

“But look, this girl who had the courage to carry her pregnancy and not to return her son to the sender, what is it? A closed door! This is not zeal! It is far from the Lord! It does not open doors!

“And so when we are on this street, we have this attitude, we do not do good to people, the people, the People of God. But Jesus instituted the seven sacraments, (and) with this attitude and we are establishing the eighth: the sacrament of pastoral customs!” he warned.

Source: Catholic News Agency, May 25, 2013, <http://www.catholicnewsagency.com/news/dont-create-sacrament-of-pastoral-customs-pope-preaches/>

### **Important Characteristics of Administrative Assistants**

Secretarial tasks typically involve producing documents, writing, proofreading, record keeping, communicating, and assisting others. But today’s church secretary does much *more* than answer the phone and produce the bulletin. There are scores of administrative tasks that when managed well make the office more helpful to members—record keeping, data entry, website updates, reports, document filing, communications, and yes, *more*.

As the secretary becomes familiar with the work of the church she sees what needs to be done and does it. Furthermore, she does it with excellent skills and a Christian spirit. She is a major asset to any church. Unless one has been there, it is hard to appreciate how diverse and demanding this job can be. The effective

secretary must be a good time manager, be able to work well with people, be able to focus on priorities. She must be caring without taking on the role of a counselor; she must be committed to tasks but be able to put them aside for the unexpected. For the qualified secretary who loves the Lord, the church office is a marvelous place to serve.

Source: Gayle Hilligoss, Effective Church Communications, August 31, 2016, <http://www.effectivechurchcom.com/church-secretaries-office-administrators-history-and-importance/>

### **Confidentiality and Compassion**

The church secretary is responsible for dealing with frequently sensitive personal information about church and community members. Empathy and discretion are key qualities for a church secretary, since she is often privy to congregation members' marital, financial or health concerns. She handles requests from people both within and outside the church for financial, counseling and emergency support, and must therefore remain current about locally available resources.

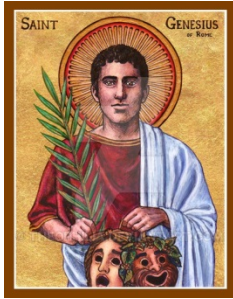
Source: Molly Thompson, "Duties of a Church Secretary," <http://oureverydaylife.com/duties-church-secretary-19741.html>

## XI. Prayers for Administrative Professionals

### St. Genesius of Rome (Arles), martyred ca. 303

Feast Day – August 25

Patron of secretaries, notaries, actors, comedians, clowns, dancers, musicians, attorneys and printers



#### **Prayer to St. Genesius for Secretaries**

St. Genesius, faithful to sound doctrine and fearless defender of the Faith, you were a careful historian and preserver of documents. Imbue secretaries with a sense of your exactitude and genuine concern for detail. In carrying out their appointed tasks, may they also attend to their spiritual duties and give glory to God in all things. Amen.

#### **The Secretary's Prayer (Published by Ann Landers)**

Dear Lord, help me to do my work well, to have the memory of an elephant and by some miracle to be able to do five things at once:  
answer four telephones while typing a letter that `must go out today.'  
When the letter doesn't get signed until tomorrow,  
please give me the strength to keep my mouth shut.

Never let me lose my patience,  
even when the boss has me searching files for hours  
for the report that later is discovered on his desk.  
Help me to read his mind and his handwriting  
and carry out all instructions without explanation.

Let me always know exactly where my boss is  
and when he'll be back, even though he never tells me these things.  
And Lord, when the year ends, please give me the foresight  
not to throw out records that will be asked for in a couple of days,  
even though I was told emphatically,  
'Destroy these; they are cluttering up the place.'  
I ask these blessings, dear Lord, in the name of secretaries everywhere. Amen.

## **XII. Links to Helpful Diocesan Resources**

Since your office is frequently expected to function as a “resource directory,” a helpful series of links to professional, pastoral and charitable resources throughout the Diocese of St. Petersburg is included below. To access these links, please go to the Chancellor’s page on our diocesan website: <http://www.dosp.org/chancellor/> Under “Forms,” you will find the PDF version of this handbook, with direct links to the following items:

### **Records Management Resources:**

- Sacramental Records Handbook
- Listing of Valid and Invalid Baptisms
- Pastoral Center Records Retention Policy Schedule
- Diocesan Parish & School Records Management Policy

Pastoral Center Directory

### **Parishes and Missions in the Diocese:**

- Searchable Directory by city, deanery or name
- Single-volume directory, including parish staff members

Human Resources – Materials

Listing of Catholic Charitable Organizations in the Diocese

## APPENDIX A: Properly Written Telephone Messages

1. If you do not have paper and pencil/pen handy when a phone call comes, ask the caller to wait while you get something to write with and on.
2. Include the name of the person for whom the message is intended and the name of the caller.
3. Find out whether the message recipient needs to return the phone call.
4. Ask for and write the caller's phone number even if a return phone call is not requested.
5. Decide whether the message needs to be written word for word or if a summary is acceptable.
6. Ask the caller to repeat any information that you missed when trying to write the message. Ask questions if necessary.
7. Be sure to write legibly and sign your name at the end of the note.
8. Either read the message to the caller or orally summarize what you wrote. The caller can then tell you if your message is written correctly.
9. When you hang up, read over your message one last time to make sure it makes sense and that all facts are included.
10. Make sure that the message is delivered to the recipient or placed where he/she will find it.

Source: Academic Communications Associates, Inc., 2002, <https://www.acadcom.com/pdfweb/49974.pdf>

**MESSAGE**

Date 14/09/02  
Time 10:45  
To Bob Williams  
From Janet Cooms  
Telephone # (250) 479-1234

|                   |                                     |                    |                                     |
|-------------------|-------------------------------------|--------------------|-------------------------------------|
| Telephoned        | <input checked="" type="checkbox"/> | Please call        | <input checked="" type="checkbox"/> |
| Called to see you |                                     | Will call again    |                                     |
| Wants to see you  |                                     | Returned your call |                                     |

Message She wants to know what time you are meeting her at the restaurant.  
Rec'd By: Muriel

Write the name of the person the caller wanted to talk to here.

Write the name of the caller here.

Write the details about the call here.

Write your name here.

# APPENDIX B: BEST PRACTICES FOR THE WELCOMING PARISH:

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## PARISH DIRECTORY

New parishioners may come to the parish with many needs. To be prepared for some of the questions they will ask you will want to gather the information to fill this table. Blank rows have been provided to personalize for your parish.

| Concern                       | Contact Person | Phone Number/<br>Email Address | Hours Available | Notes |
|-------------------------------|----------------|--------------------------------|-----------------|-------|
| <b>Sacraments - Adults</b>    |                |                                |                 |       |
| RCIA                          |                |                                |                 |       |
| Confirmation                  |                |                                |                 |       |
| Marriage                      |                |                                |                 |       |
| Divorce / Annulment           |                |                                |                 |       |
|                               |                |                                |                 |       |
| <b>Sacraments - Children</b>  |                |                                |                 |       |
| Baptism                       |                |                                |                 |       |
| Reconciliation                |                |                                |                 |       |
| First Eucharist               |                |                                |                 |       |
| Confirmation                  |                |                                |                 |       |
|                               |                |                                |                 |       |
| <b>Teens – Youth Ministry</b> |                |                                |                 |       |
| Sacramental Needs             |                |                                |                 |       |
|                               |                |                                |                 |       |
| <b>Faith Formation</b>        |                |                                |                 |       |
| Adults                        |                |                                |                 |       |
| Teens                         |                |                                |                 |       |
| Children                      |                |                                |                 |       |
|                               |                |                                |                 |       |
| <b>Healing Ministries</b>     |                |                                |                 |       |
| Counseling                    |                |                                |                 |       |
| Unemployment                  |                |                                |                 |       |
| Parish Reconciliation         |                |                                |                 |       |
|                               |                |                                |                 |       |
| <b>Diocesan Services</b>      |                |                                |                 |       |
| Tribunal                      |                |                                |                 |       |
| Catholic Charities            |                |                                |                 |       |
| Victims Assistance            |                |                                |                 |       |
|                               |                |                                |                 |       |

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# APPENDIX C: BEST PRACTICES FOR THE WELCOMING PARISH:

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## PHONE SKILLS

- 1) **Attitude**
  - a. What do you want people to think about you?
  - b. How do you want them to view the parish?
- 2) **Preparation**
  - a. Physical (deep breath, smile)
  - b. Tools (good pen, phone message pad, etc.)
  - c. Information (Parish Directory, DOSP Directory, etc.)
- 3) **Greeting**
  - a. Tone of voice (calm and welcoming)
  - b. State parish name
  - c. State your name
  - d. "How may I help you?"
- 4) **Listen**
  - a. Focus on the call/caller
  - b. Don't multi-task
- 5) **Facilitate a Solution**
  - a. Decide the next/best step to answering the caller's question or connecting them to the person who can best help them
  - b. Take the caller's name and number
  - c. Ask them to spell their name
  - d. Repeat the phone number
  - e. Note the reason for the call
- 6) **If Transferring the Call**
  - a. Tell the caller you are transferring the call
  - b. State the name and number of the person you are transferring them to just in case the call is disconnected by accident
- 7) **If the Person They Need to Speak With Is Not In**

State what action you will take ("I will give the message to Ms. Jones, and you can expect a call back on by Tuesday")
- 8) **Ask them if they have any other questions**
- 9) **Closing the call**
  - a. End on an up note
  - b. Briefly repeat/reaffirm what you are going to do for them
  - c. **Thank them for calling**

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## APPENDIX D: BEST PRACTICES FOR THE WELCOMING PARISH: WHAT MAKES FOR A GOOD WELCOME?

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- ✓ Enthusiasm that is contagious
- ✓ Respecting human limits
- ✓ Making things easier and lighter
- ✓ Being aware: Worship and raising a family is more important than volunteering
- ✓ Encourage talk about spiritual and human needs
- ✓ Joyfulness and Passion for Faith
- ✓ Positive communication of mission and goals
- ✓ Conversations that engage the person
- ✓ Spiritual growth is valued and encouraged
- ✓ Genuine friendliness and encouragement
- ✓ Personal expressions of appreciation
- ✓ Expressions of welcome are a habit
- ✓ Freedom to adjust and do what you do best