

Diocese of Lafayette-in-Indiana

Director of Operations Reference

Table of Contents

| | | |
|------------|---------------|--|
| | Page 2 | Common Acronyms |
| | Page 3 | Key Diocesan Contact Information |
| 1) | Page 4 | Prayer |
| 2) | Page 4 | Safe and Sacred – Safe Environment |
| 3) | Page 4 | Director of Operations – Role, Context and Administration |
| 4) | Page 5 | Onboarding – The First Month |
| 5) | Page 8 | Banking |
| 6) | Page 9 | Investments |
| 7) | Page 9 | Credit Cards |
| 8) | Page 10 | Budgets |
| 9) | Page 10 | Time Management |
| 10) | Page 11 | Finance Councils |
| 11) | Page 11 | Major Projects |
| 12) | Page 12 | Facilities – Maintenance and Custodial |
| 13) | Page 12 | Second Collections |
| 14) | Page 13 | Record Retention |
| 15) | Page 13 | Catholic Ministry Appeal |
| 16) | Page 13 | Planned Giving |
| 17) | Page 13 | Diocese of Lafayette-in-Indiana Endowments – LDFI |
| 18) | Page 14 | Human Resources |
| 19) | Page 15 | Communication |
| 20) | Page 16 | Software Programs |
| 21) | Page 16 | Information Technology – Resultant |
| 22) | Page 16 | Insurance – Catholic Mutual |
| 23) | Page 18 | Worker Compensation – Gregory Appel |
| 24) | Page 18 | Annual Financial Reports |
| 25) | Page 19 | Policy Manual |
| 26) | Page 19 | Diocese of Lafayette-in-Indiana Contact Information – Directory |
| 27) | Page 19 | School Choice Scholarship Program |
| 28) | Page 20 | Scholarship Granting Organization – Tax Credit Scholarship Program |
| 29) | Page 20 | Gaming |
| 30) | Page 21 | Cemetery |
| 31) | Page 22-34 | Appendices |

Common Acronyms

| | |
|-----------|---|
| 403B | Lay Employee Retirement Plan (employees hired in 2019 or after) |
| 501(c) | IRS Code designates certain types of organization as tax-exempt; pays no Federal Tax |
| 501(c)(3) | IRS Code specifically exempting charitable, religious, etc organizations from Federal Tax |
| ACH | Automated Clearing House (used to electronically move money between banks in the US) |
| BOM | Beginning of Month |
| CHOICE | State of Indiana School Choice Scholarship Program |
| CMA | Catholic Ministry Appeal |
| CMG | Catholic Mutual Group |
| DOE | Department of Education |
| DOE | Director of Evangelization |
| DOL | Diocese of Lafayette-in-Indiana |
| DOO | Director of Operations |
| FC | Finance Council |
| FMLA | Family Medical Leave Act |
| i4QED | Institute for Quality Education (works with SGO) |
| IDOE | Indiana Department of Education |
| LDFI | Lafayette Diocesan Foundation, Inc |
| LERP | Lay Employee Retirement Plan (employees hired prior to 2019) |
| ME | Month End |
| MP | Ministry Platform |
| NCEA | National Catholic Education Association |
| NSBECS | National Standards and Benchmarks for Effective Catholic Schools |
| OSV | Our Sunday Visitor |
| PC | Pastorate Consultant |
| PLT | Pastorate Leadership Team |
| PM | Preventative Maintenance |
| PVP | Pastorate Vision Plan |
| PY | Prior Year |
| SGO | Scholarship Granting Organization administers Tax Credit Scholarship via i4QED |
| UIH | Uniting in Heart |
| USCCB | United States Conference of Catholic Bishops |
| YE | Year End |

Diocese-of-Lafayette in Indiana

Key Contact Information

DOL online directory can be accessed via: <http://dol-in.org/directory>

Finance CFO: Matt McKillip, mmkillip@dol-in.org

Finance Controller:, - Being recruited

Accounting System Sage: Christine Hardenburg, chardenburg@dol-in.org

Internal Auditor: Scott Mitchell, smitchell@dol-in.org

Facilities Manager: Andy Guljas, aguljas@dol-in.org

Human Resources Director: Jeanne Lausten, jlausten@dol-in.org

Payroll and Benefits: Becky Sarver, rsarver@dol-in.org

Communications: - Being recruited

Stewardship & Catholic Ministry Appeal: Mike MacNulty, mmacnulty@dol-in.org

Ministry Platform: Suzanne Bowser, sbowser@dol-in.org

Superintendent of Catholic Schools: Trudy Young, tyoung@dol-in.org

Director of Pastorate Life Services: Missy Krockover, mkrockover@dol-in.org

Vicar General Fr. Ted Dudzinski Assistant: Julianne Dejoie-Pollard, jdejoie-pollard@dol-in.org

Bishop Doherty Assistant: Rhonda Chyall, rchyall@dol-in.org

1) Prayer

- a) Meetings open and close with Prayer.
- b) A short St. Joseph the Worker Prayer can be used with the maintenance and accounting team:
God our Father, Creator and Ruler of the universe, in every age you call us to use and develop our gifts for the good of others. With St. Joseph as our guide, help us to do the work you have asked and come to the rewards you have promised. Please grant this through Christ our Lord. Amen.

2) Safe and Sacred – Safe Environment

- a) Safe and Sacred is the name of the Diocese of Lafayette-in-Indiana Safe Environment program.
Everyone who works with young people and/or vulnerable adults shares the responsibility of creating safe environments. We are all charged with treating life with the respect and dignity given to each of us by our God.
- b) DOL Commitment
 - i) The Diocese of Lafayette-in-Indiana is dedicated to ensuring a culture that is safe, open, welcoming and protective of all people and especially our children.
 - ii) We cooperate with parents, civil authorities, educators, and community organization to provide education and training for children, youth, parents, ministers, educators, volunteers and others about ways to make and maintain a safe environment for children and vulnerable adults
 - iii) The Diocese makes clear to clergy and members of the community the standards of conduct for clergy and other persons in positions of trust with regard to abuse.
 - iv) The Diocese will evaluate the criminal history background of all diocesan, school and parish employees, as well as volunteers who have regular contact with minors. Specifically, they will utilize the resources of law enforcement and other community agencies.
 - v) Finally, all employees, as well as volunteers with any level of contact with youth will successfully complete safe environment training on a regular basis. Diocese will evaluate the criminal history background of all diocesan, school and parish employees, as well as volunteers who have regular contact with minors.
- c) Safe Environment Training is required for employees and many volunteers. The link to Safe Environment Training is <https://dol-in.org/online-safe-environment-training>
- d) The DOO or DOE should be listed as the Safe and Sacred Pastorate point of contact.
- e) Code of Conduct
 - i) See appendix G or visit <https://dol-in.org/diocesan-code-of-conduct>

3) Director of Operations – Role, Context and Administration

- a) Uniting in Heart – 2030 Pastoral Plan
 - i) Uniting in Heart desires to help everyone know Jesus Christ and to foster a deeper personal commitment to follow Him in His Church. As the Body of Christ in this diocese, Uniting in Heart seeks to equip us to proclaim the Gospel in all that we do for the salvation of souls through the three pillars of Mission, Community and Witness.
 - ii) To learn more about the Diocesan Pastoral plan, visit the Diocese of Lafayette in IN website or <https://dol-in.org/uniting-in-heart>
- b) The Director of Operations role is designed to manage the day-to-day operations of the Pastorate; allowing the Pastor to focus on the Spiritual needs of the Community and providing Parishioners confidence that their gifts are being carefully and appropriately managed.
- c) Job Description - See Appendix A

4) Onboarding – The First Two Weeks

a) Introductions

- i) Talk with the Pastor to understand who is the Pastorate Consultant for your Pastorate.
 - (1) Contact the Pastorate Consultant (PC) to introduce yourself and learn about the Pastorate Consultant role and current Pastorate activities.
 - (2) The Pastorate Consultant is to be a true collaborator, someone who helps the Pastor and Leadership Team see things objectively and shares best practices from across the diocese and is an advocate for the Pastor and his staff. There is a pastorate consultant assigned to each pastorate in the diocese.
 - (3) PC is to be involved in dialogue of any organizational change and hiring process.
 - (4) PC is to assist with employee development, employee improvement, Pastor and Leadership Team selection, Pastorate Pastoral and Finance Council structures and functions.
 - (5) PC is to have an onsite presence and be a support for pastor, pastorate staff, a liaison to other pastorate staffs and chancery offices. The pastorate consultant is striving for a mission of service to the pastor, staff, and pastorate ministries.
- ii) Prioritize time to meet with and develop a personal/professional relationship with colleagues and parishioners. This allows them the opportunity to get-to-know you and for you to thank them in advance for their support as you come up to speed.
- iii) Employee roster. Becky Sarver, Diocesan Payroll and Benefits Coordinator, rsarver@dol-in.org to obtain a Pastorate employee list with titles, phone numbers and email addresses.
- iv) Unofficial Mentor. Discuss with the Pastor and/or Pastorate Consultant if they know of a DOO at another Pastorate that would be someone you could contact with questions.
- v) Finance Council(s): meet with the Pastor or Administrative Assistant to get the names and email addresses for the Finance Council(s) and dates of the next meeting(s). If there are no near-term meetings set, consider sending an invitation for a “meet and greet” with them.

b) Organization


- i) Pastorate: meet with the Pastor or another member of the Pastorate Leadership Team to review the Pastorate organization design and individuals. This would include reporting structure, all employees (full-time and part-time) and key volunteers.
- ii) Diocese: meet with the Pastor or the Director of Operations from another Pastorate to facilitate meeting key Diocesan contacts. Namely, the CFO, Controller, HR Director, Payroll and Benefits Coordinator, Stewardship and Development Director, and Facilities Manager. These are core contacts that can provide guidance, answer questions and navigate the DOL organization.
- iii) DOL online directory can be accessed via: <http://dol-in.org/directory>


c) Buildings and Grounds

- i) Meet with the Pastorate Facilities / Maintenance Manager. Walk each property together. Note the property boundaries; and the name, number and condition of each property. Discuss any currently budgeted and future capital project needs.

d) Keys and Access

- i) Meet with maintenance to procure appropriate keys, fobs, codes to enable access to the building and your office.
- ii) Inquire about record keeping of keys: who is responsible for key management, key storage, etc.

- e) Alarms – Security, Fire, etc
 - i) Meet with Maintenance and/or Pastor to understand the alarm systems.
 - ii) Security Alarms/Cameras - understand security alarm(s) and camera(s), if any, by building
 - (1) Are alarms automatically timed for on/off; what is the code to disarm/silence the alarm
 - (2) Is alarm monitored by a third party; name, communication sequence, etc.
 - (3) Do security cameras have recording capability, who has access, storage, retrieval, etc.
 - iii) Fire Alarms – understand the type of fire alarm(s) being used by building
 - (1) Are alarms monitored by a third party; name, communication sequence, etc.
 - (2) Are alarms smoke or heat detection
 - (3) Is there a sprinkler system; type, wet or dry, charged
 - f) Schedules and Calendar
 - i) Meet with the Administrative Assistant, Pastor or colleague to note routine meetings
 - ii) Meeting Name, Frequency, Location, Days, Dates, Times, Duration
 - iii) At a minimum, the Pastorate Leadership Team, All Staff, Finance Council Meeting(s), Pastorate Pastoral Council Meeting(s), etc.
 - g) Emergency Contact List
 - i) Work with the Administrative Assistant and Maintenance
 - ii) Local Services: Fire, Police, Ambulance, etc.
 - iii) Key Pastorate Employees mobile phone; Pastor, PLT, Principal, Others
 - h) Familiarize yourself with:
 - i) DOL website: <https://dol-in.org>
 - ii) DOL Policy Manual: <https://dol-in.org/policy>
 - iii) TEAMS and the DOO onboarding documents. These onboarding documents are located within TEAMS, DOO, Orientation Documents.
 - iv) Employee Handbook: <https://dol-in.org/diocesan-employee-handbook-2016>
- 

DOL Employee Handbook.pdf
- v) The Accounting Manual: <https://dol-in.org/admin-forms>
- 

DOL Accounting Manual 10-01-21.pdf
- i) Cash
 - i) Assess the current cash situation, determine if there are any urgent actions needed.
 - ii) Meet with the Pastor or Bookkeeper and get a copy of the last three to six months bank statements for each Parish and School account.
 - iii) Review each account for the current balance, each month ending balance, each monthly total credits and total debits.
 - iv) Analyze the current cash position relative to the average monthly income/expense activity. A trend of month ending (beginning of month) balance(s) can be helpful by providing a visual representation of past cash movement and future month forecasting.
 - v) Ask the Pastor, bookkeeper and maintenance personnel if there are any unusual expenses anticipated in the next few weeks / months; for example, capital maintenance project spend.

j) Credentials and Distribution Lists

- i) Secure log-on credentials for each of the software programs used by the business office; and, request inclusion on all DOO distribution lists.

| <u>Program</u> | <u>Contact</u> |
|------------------------|--|
| Sage | Sage Specialist Chris Hardenburg, chardenburg@dol-in.org |
| Paylocity | Coordinator Payroll, Becky Sarver, rsarver@dol-in.org |
| Ministry Platform | Administrator, Suzanne Bowser, sbowser@dol-in.org |
| Raisers Edge | Director Stewardship, Mike MacNulty, mmacnulty@dol-in.org |
| Ascensus/NYHART | Coordinator of Benefits, Becky Sarver, rsarver@dol-in.org |
| RETA | Coordinator of Benefits, Becky Sarver, rsarver@dol-in.org |
| DoO Distribution Lists | Director of Pastorate Life Services, Missy Krockover, mkrockover@dol-in.org |
| TEAMS | Director of Pastorate Life Services, Missy Krockover, mkrockover@dol-in.org |

k) Accounting System (Sage) Training:

- i) Arrange for Sage Accounting System training by contacting Chris Hardenburg, chardenburg@dol-on.org
- ii) Christine can also provide you the link and credentials for the on-line Sage training. This is a good source for understanding system capability and introductory training.
- iii) Sage is a professional accounting system shared commonly by all in the diocese, so it is important that the proper way to make all entries is thoroughly understood. Care must be taken to think through the transaction/process, carefully and accurately enter the transaction and if needed call Christine or Scott in the Chancery if any doubts remain. Individuals without a basic knowledge of accounting will struggle with Sage and make mistakes that can take time to correct.

l) Sunday Offertory Collection (see attached policy below)

- (1) Essentially “follow the money” from Mass collection through deposit and Parishioner donations tracking. The goal is to understand the processes associated with the primary source of income.
- (a) How is the money stored before being counted?
- (b) Who are the counters, when is it counted, is there a rotation?
- (c) How do the counters treat envelopes vs checks vs cash?
- (d) How is the collection differentiated between general collection and designated donations?
- (e) Was there a second collection? How is it treated relative to normal Sunday collection?
- (f) Who and when are the funds deposited?
- (g) Parishioners receive credit for their donations via posting in Ministry Platform – who enters the donation data into Ministry Platform?
- (h) Once the money (checks and cash) are deposited, how is the deposit posted in the financial book; amount to regular collection vs amounts to various designated funds.



006 DOL Parish
Inspection 08-29-19 L

5) Banking

a) Bank Accounts

- i) Each Parish must have its own Parish General Account and Mass Stipend Account.
- ii) It is recommended that each school have a separate general account. This account is used for normal school related banking activity such as tuition collection, payroll, other expenses; and, for other activity such as direct deposit(s) from the State of Indiana for Choice Scholarships, SGO, Cafeteria reimbursements, Grants, etc.
- iii) If the Parish engages in "gaming" as defined by the State of Indiana Gaming Commission, that Parish must have a separate gaming bank account for use as defined by the Indiana Gaming Commission. See <https://www.in.gov/igc/charity-gaming/> for relevant guidance.
- iv) The Mass Stipend Account must be kept separate and is to be used solely for the purpose of Mass Stipends. This must be a non-interest bearing account.
- v) There shall NOT be individual ministry bank accounts*; for example: Funeral Dinners, Youth, Flowers, etc. These ministry accounts are to be sub-accounts in the Sage accounting system. Balances in these funds are considered designated and are to be used for donations/spending for that designated purpose only.
- vi) Where there are two or more Parishes in a Pastorate, there shall NOT be a combined Parish or Pastorate bank account*.
- vii) * Contact Matt McKillip, CFO, if you or your Pastor believe there is justification for requesting an exception

b) Signature Cards

- i) Signature cards for all bank accounts must include: Pastor, DOL CFO and DOO. Additional signatures are optional and may include, as examples: Pastorate Priest(s), Finance Council Member, Principal or another person(s) as deemed appropriate by the Pastor.

c) Positive Pay

- i) Is a banking system designed to prevent / protect from fraud. There is generally a small fee associated with this fraud protection.
- ii) Although each positive pay system can be slightly different, they are designed to accomplish a level of fraud protection by matching checks written to checks being cleared. More specifically, the positive pay system is populated by an upload from each check run that includes the check number, payable to, date and amount. When checks are being cleared, these fields are then matched to the uploaded fields. If there is any discrepancy, the process is placed into an automatic "hold" until the issuing institution gives direction.

d) Mass Stipend Account

- i) Shall not have more than one year of Mass Intention funds. If this account has more than one year of Mass Intention funds, seek guidance from the Pastor for how manage disbursements to recover this objective.
- ii) This must be a non-interest bearing account

e) Online access

- i) The DOO should have online access to all bank accounts with the authority to view account balances, print online statements, and transfer money between accounts.

6) Investments

- a) Best investment practice is to pool your Pastorate investment funds with the Diocesan Investment Account. This reduces local workload to do investment RFPs, can result in lower fees and greater returns, and provides assurance to socially responsible investing. Contact Matt McKillip, CFO for more information.
- b) In addition to general funds bank accounts, each Parish may have Investment Accounts. These accounts may, or may not, be designated. Be sure to check with the Pastor or Finance Council for clear understanding of designation or general use funds.
- c) Investment strategy and portfolio should align with Catholic Teaching. Refer to the USCCB document for "Socially Responsible Investment Guidelines." Investments should avoid companies that participate in or support abortion; companies that manufacture or derive significant revenues from contraceptives; companies that engage in scientific research on human fetuses and embryos that result in the end of prenatal life or violate the dignity of the developing person; and companies that have significant involvement in the manufacture of weapon systems.
- d) The primary objective of the investment of Funds is to provide consistent, long-term, growth of capital, without undue exposure to risk. A secondary focus shall be placed on income generation to assist in providing for the Fund's distributions. The objectives shall be accomplished utilizing a strategy of equities, fixed income and cash equivalents in a mix conducive to participate in rising markets while allowing for protection in falling markets.
- e) Signature Cards on all investment accounts must include: Pastor, DOL CFO and DOO. Additional signatures are optional and may include, as examples: Pastorate Priest(s), Finance Council Member, Principal or another person(s) as deemed appropriate by the Pastor.
- f) On-line access - The DOO should have online access to all bank accounts with the authority to view account balances, print online statements, and transfer money between accounts.

7) Credit Cards

- a) A parish or school may establish a credit card account. If this is done, the Pastor or administrator of the school or department shall be the authorized user(s) of the card.
- b) With the advice of the parish finance council, there may be limited access to others.
- c) Debit cards shall not be used by parishes, schools, or departments.
- d) The parish, school or departments credit card shall only be used where it is not appropriate or convenient to issue a check.
- e) The parish, school or department credit card shall never be used for personal expenses or for ATM transactions or for cash advances.
- f) The credit card balance shall be paid monthly on or before the due date.
- g) See the DOL Policy Manual for the Credit Card Policy; book V, Policy 4300 (pasted below).



dol Book V 4300
Parish School or Dioc

8) Budgets

- a) Each parish and school are to have a budget prepared annually and to operate within a budgetary framework.
- b) The primary purpose of the budget is to identify the financial resources needed to accomplish the Parish(s) and School programs. Budgetary control and financial reporting should assure all concerned that Parish funds are administered properly.
- c) The DOO works with the finance council to draft and prepare a budget for the Pastor's approval
- d) Timeline:
 - i) The months listed below are for your consideration with the goal being to start the process with sufficient time to secure approval by the end of the year. This assumes the fiscal year is the calendar year.
 - ii) September
 - (1) review with department leads the current year actual vs budget situation.
 - (2) In concert with department leads, forecast a budget based on past experiences and the forecast of programs, needs that might be new or different in the coming year.
 - (3) With input from the Pastor and finance council, and knowledge of past offertory trends, increased offertory programs, etc; formulate the anticipated offertory for the coming year.
 - (4) Review with the Pastor and finance council key assumptions to be used in the budget development. For example, general inflation rate, number of employees, wage increases, major/capital projects, increased offertory program, parishioner changes, etc.
 - iii) October
 - (1) Input the developed data into the budget format for first draft evaluation
 - (2) Based on the outcome, determine if the net result is agreeable or if adjustments are needed
 - (3) If adjustments are needed; prepare to again discuss with department leaders, finance councils, others, to get input into accounts that can be adjusted.
 - (4) Repeat #1 - #3 as needed to reach a draft with an agreeable net result
 - iv) November
 - (1) Review with the finance council the most recent draft with a presumed agreeable net result
 - (2) Identify risks to revenue and expense
 - (3) Re-do the budget with any 'last minute' changes
 - v) December
 - (1) Secure budget approval
 - (2) Input the budget into the Sage accounting system

9) Time Management

- a) Being able to plan is key to effective time management
 - i) Knowing standing meeting date(s) and time(s)
 - ii) Be aware of deadlines; for example, budgets, Finance Council meeting content, etc.
- b) Invest some time developing a long-range plan outlook. The pdf below is an example, it is not a complete list of activities, etc.



240626 Macro
Timeline.pdf

10) Finance Councils – Parish and School

- a) Every parish shall be required, both by adherence to the Code of Canon Law and Diocesan policy, to have a Finance Council.
- b) Every parish Finance Council shall meet at least quarterly and minutes of all the parish Finance Council meetings shall be recorded.
- c) Finance councils are consultative, the Pastor remains the juridic authority for final decisions.
- d) Meeting Agenda – see Appendix E for suggested meeting preparation and agenda template.
- e) See the Finance Council Policy in Book V, Policy 2000. The link to the policy manual is listed in the Policies section.



dol Book V 2000 The
Parish Finance Council

- f) Conflict of Interest. Annually, at the first meeting of the calendar/fiscal year, all members of various Finance Councils will sign an acknowledgement that they have read and understand, Book V Policy 3500 The Conflict-of-Interest Policy. The link to the policy manual is listed in the Policies section.



dol Book V 3500
Conflict of Interest.pdf

11) Major Projects

- a) Andy Guljas, DOL Facilities Manager, is the first point of contact for all major/capital projects; aguljas@dol-in.org
- b) Major / Capital Projects definition: refer to the attached policy to determine if a project is considered a major capital project.



dol Book V 0700
Capital Projects for Pa

- c) Project Authorization Request Form: All major projects require the attached form to be completed and forwarded to the DOL Facilities Manager, Andy Guljas, aguljas@dol-in.org Andy will review, work with the DOO, and then process the form through the DOL channels and provide feedback the DOO.



Project Authorization
Request 02-24-2021.p

- d) There will be a 2% Project Assessment on all construction, renovation, maintenance and land acquisition projects, where the final Total Project Budget exceeds \$30,000; these funds are the source for building a DOL fund for future use as:
 - i) Property insurance fund, such that the Diocese can assume a larger deductible
 - ii) Assisting parishes and schools with limited means to cover essential project life cycle costs including land acquisition, feasibility study, design / engineering, legal, construction and maintenance, through to closure and demolition activities.
 - iii) DOL travel costs associated with projects.

12) Facilities – Maintenance and Custodial

- a) Meet with maintenance to understand maintenance and custodial processes, work schedule, and responsibilities.
 - i) What is the maintenance resource(s) and routines?
 - ii) What maintenance work is generally in-house and vs outsourced?
 - iii) Are custodial services in-house or outsourced to third party?
 - iv) If there is a school, understand custodial service responsibilities and schedule.
- b) Seasonal Maintenance: meet with maintenance to understand seasonal work
 - i) Summer – mowing responsibility; in-house or outsourced?
 - ii) Winter – snow removal (drives, lots, sidewalks, etc.) is this in-house or outsourced?
 - iii) Heating Systems: Sept/Oct have the heating systems prepared (filters, antifreeze, etc.) before the winter.
 - iv) AC Systems: March/April have AC systems prepared (filters, freon, etc.) before summer.
- c) Asbestos:
 - i) If there is a known, newly discovered, or potential concern regarding asbestos; contact DOL Facilities Manager, Andy Guljas for background and path forward; aguljas@dol-in.org
 - ii) If the Asbestos is in a school building, there are routine reporting requirements that must be respected. Contact DOL Facilities Manager, Andy Guljas for direction; aguljas@dol-in.org
- d) Pest Control: Does the Pastorate have a formalized pest control program?
 - i) Specifically, with regards to any cafeteria, kitchen, food prep/service areas
 - ii) If there is a school; take a more detailed interest in the service
 - (1) What chemicals are being applied, on what days and at what times?
 - (2) Are there MSDS sheets available if needed, etc.
- e) Is there a Preventative Maintenance Program?
- f) Is there a list of Capital / Major Project needed with estimated cost and anticipated timing?
- g) Is there a Maintenance Committee?
- h) Conduct a building(s) audit; for example; do any buildings have foundation/water problems? See attached Building Inspection Template.



006 DOL Parish
Inspection 08-29-19 L

13) Second Collections

- a) The DOL will publish annually the schedule for second collections. This is used in budgeting and for Liturgical planning such as communication with ushers, parishioners, etc.
- b) Note the second page of the attachment specifying how second collection monies collected are to be distributed.



24.02.02.Handout on
National Collections.p

14) Record Retention

- a) The word “records” used in this policy refers to all recorded information, documents, letters, maps, books, academic transcripts and records of coursework, photographs, films, sound recordings, tapes (magnetic and otherwise), electronic data processing records, emails sent and received, recorded voice mails, electronic data banks and other documentary material created, received, maintained or preserved by any department, parish, or school employee of the Diocese of Lafayette-in-Indiana in the course of transactions of business or ministry or in pursuit of its legal obligations.
- b) Effective record retention includes the timely destruction of records as outlined in the policy.



Records
Management Data Re

15) Catholic Ministry Appeal (CMA)

- a) Contact is Mike MacNulty, Director of Stewardship and Development, mmacnulty@dol-in.org
- b) The Catholic Ministry Appeal is the annual Bishop/Diocese direct appeal to Parishioners.
- c) The Appeal runs from January 1 to December 31 each year.
- d) To learn more, visit the DOL website or follow the link: storybook.link/2024AnnualAppeal/
- e) The Diocese establishes a new goal for each Parish/Pastorate each year.
- f) The Pastorate is accountable for 100% of the total goals of all parishes in the Pastorate. Once a Pastorate reaches 100% of the Pastorate goal, it is eligible for a rebate per the formula.
- g) See Appendix B for more explanation.

16) Planned Giving

- a) Any gift, made in a lifetime or at death as part of a donor’s overall financial and/or estate planning.
- b) Contact Mike MacNulty, Director of Stewardship and Development, mmacnulty@dol-in.org



dol Book V 2200
Endowment Funds an

17) Diocese of Lafayette Endowments – LDFI – Lafayette Diocesan Foundation, Inc

- a) New endowments must be set up at the LDFI. Please see policy Book V §2200 ENDOWMENT FUNDS AND TRUSTS. The LDFI holds a number of endowments for Parishes, Schools and the Diocese. These endowments are professionally managed.
- b) Contact Mike MacNulty, Director of Stewardship and Development, mmacnulty@dol-in.org
- c) The link to the LDFI page on the DOL-IN website:
 - i) <https://dol-in.org/lafayette-diocesan-foundation-endowment-list>
- d) The link to the list of Endowments for parishes.
 - i) <https://dol-in.org/ldfi-parish-endowments>
- e) See Appendix C for more information.

18) Human Resources

- a) Director, Jeanne Lausten, jlausten@dol-in.org
- b) Payroll and Benefits Coordinator, Becky Sarver, rsarver@dol-in.org
- c) Employee Handbook (see attached) or visit <https://dol-in.org/diocesan-employee-handbook-2016>



DOL Employee
Handbook.pdf

- d) Employee 2024 Benefit Guide (see attached)



2024 dol benefit
guide.pdf

- e) Hiring and Employment

- i) The DOO is part of Pastorate hiring process; along with the Pastor, the hiring manager, the Pastorate Consultant and the DOL Director of Human Resources.
 - (1) The DOO should dialogue with Pastor and the Pastorate Consultant prior to reaching out to DOL Director of Human Resources.
- ii) Open positions are to be posted on the DOL website via Becky Sarver, rsarver@dol-in.org and Jeanne Lausten, jlausten@dol-in.org, the Pastorate bulletin, Pastorate website and other local social media. Job vacancies can also be posted to a wider variety of outlets, Examples are CatholicJobs.com, posted on Campus Newhouse job boards, etc.
- iii) See the DOL website for examples of open position postings
- iv) Candidates should send cover letter and resume to either the hiring manager, DOO, [Pastorate Consultant](#) or Administrative Assistant as advised in the open position posting.
- v) Conduct resume screen for appropriate skills and experiences.
- vi) Candidates passing the initial resume screen, proceed with an initial contact via telephone call or in-person meeting with all viable candidates.
- vii) Schedule the top candidates for in-person interview(s) and request they complete the DOL employment application.
- viii) Once a decision is reached, and with Pastor approval, proceed with a written offer to the “best” candidate based on skills, experiences, fit, etc. Contact Jeanne Lausten to review the proposed offer letter to assure all required information is contained in the content of the offer letter.
- ix) Contact Director of Human Resources, Jeanne Lausten, with questions; jlausten@dol-in.org
- x) Finally, once the candidate has accepted, notify the appropriate person to remove the open position posting from DOL website, the bulletin, the Pastorate web site(s), etc.



dol Book II 210
Hiring and Employe

- f) Job Descriptions

- i) Standardized job descriptions are available via: TEAMS, then click on DOO, Job Descriptions, Files. Search for and open the most applicable file folder.

- ii) Contact DOL Human Resource Director, Jeanne Lausten before renaming or hiring into a “new”, non-standard job title/description. This assures proper labor law and disparate treatment has been respected. jlauten@dol-in.org

g) General Personnel Policies

- i) Familiarize yourself with the attached General Policies



dol Book II 240-270
General Personnel Po

h) Retirement Plan(s)

- i) There are two retirement plans. Both the LERP and the 403b Retirement Plans are held through Ascensus; <https://secure.ascensus.com/login/participant>
- ii) LERP (Lay Employee Retirement plan) is a defined benefit plan that applies to employees hired prior to 2019; the LERP is a traditional employer funded retirement plan
- iii) 403b is a defined contribution plan that applies to employees hired in 2019 or later. This is an Employer and Employee Contribution Plan
 - (1) DOL funds 2% of the employee salary for employees who qualify
 - (2) DOL matches employee contribution at a rate of 0.5% to a max of 3% for employees who qualify
 - (3) If the employee contributes 6%; the DOL contributes 5% - 5% is the max DOL contribution
 - (4) Employees can contribute more than 6% up to the IRS limits
 - (5) Many hires are automatically enrolled at a 6% contribution rate if -Part time 'scheduled to work 1000+ hours' per year are auto enrolled at 6%. Part time less than 1000 hours are not auto enrolled. Anyone coded as full time is auto enrolled also. Anyone else can choose to enroll.
- i) FMLA – Family Medical Leave Act
 - i) Provides certain employees with up to 12 weeks of unpaid, job-protected leave per year.
 - ii) There are many nuances to the Family Medical Leave Act. Therefore, it is advised to assess each situation on an individual basis.
 - iii) Contact DOL benefits Coordinator, Becky Saver as soon as the potential FMLA situation arises; rsarver@dol-in.org
 - iv) Refer to the Employee Handbook for general understanding of FMLA process and requirements. See the attachment embedded in paragraph 14) section C.

19) Communications

- a) Director of Communications, - Being Recruited
- b) DOO Role / Expectations
 - i) Communication to Pastors, Priests, PLT, Accounting and Maintenance Departments
 - ii) DOOs are expected to supply the Pastor, et al, with key information shared in the DOO meetings AND other communications (emails) sent to the DOOs.
- c) Public Inquires, Media, Reporters, External Communications
 - i) Employees are not to make statements on behalf of the Parish, Pastorate, School to Media, Reporters, or other entities.

- ii) Media questions or request for information or comment are to be directed to DOL communications Director, - Being Recruited
- d) Social Media Policy



dol Book II 280 Social
Media Policy.pdf

20) Software Programs

- a) Sage – Accounting System
- b) Paylocity – Payroll System
 - i) <https://access.paylocity.com>
 - ii) Employees are to enter their time worked and time off into Paylocity
 - iii) Paylocity is also used to track employee personal and vacation time earned & used
- c) Ministry Platform – Parishioner Database
 - i) Contact Suzanne Bowser for website address and credentials; sbowser@dol-in.org
- d) Raisers Edge – Catholic Ministry Appeal Database
 - i) Contact Mike MacNulty for website address and credentials; mmacnulty@dol-in.org
- e) TEAMS – including access to the DOO Group
 - i) Contact Resultant if not installed on laptop
 - ii) Houses reference documents, used for virtual meetings, etc.
- f) Ascensus – Employee Retirement
- g) <https://secure.ascensus.com/login/participant>
- h) RETA – Employee Benefits
 - i) <http://retatrust.org>
- i) Barada – third party that conducts employee background check
 - i) <https://baradainc.com>

21) Information Technology - Resultant

- a) IT services are outsourced to a company named Resultant. Each Parish is assed a monthly fee for standard services. Non-Standard services will be billed separately to the Parish.
- b) Securing a quote for non-standard services is strongly encouraged.
- c) IT request for support can be submitted via email addressed to dolsupport@resultant.com or by calling the help desk at 317-827-0190
- d) For a basic description of standard and non-standard services provided by Resultant see Appendix D.

22) Insurance – Catholic Mutual Group

- a) CFO, Matt McKillip is the first point of contact for potential claims; mmckillip@dol-in.org
- b) CMG is the insurance provider for the DOL
 - i) The CMG website has many training documents, form, etc. <https://catholicmutual.org>

- c) Current contact is:
 - Sarah O'Connor, Account Manager, Soconnor@catholicmutual.org
 - Catholic Mutual Group, 10843 Old Mill Road Omaha, NE 68154
 - W | (402) 514-2366 C | (402) 681-8293
- d) Deductible
 - i) The Parish deductible for 2024-25 for each claim is \$3,500 per event. The next 49,500 is paid by the Chancery.
- e) Special Event Coverage
 - i) Contact CMG to review upcoming special events; for example: festivals, parades, trips, etc.
 - ii) Jointly determine if special event coverage is recommended
 - iii) Contact CMG a minimum of 2 weeks prior to the event



Special Event
Guidelines.pdf

- f) Accident Reporting
 - i) Inform CFO, Matt McKillip of the Injury, mmkillip@dol-in.org
 - ii) Complete CMG accident report form located on the CMG website; or optional form appendix F
 - iii) Submit initial report within 24 hours
 - iv) Secure the injured basic personal information including their description of the accident
 - v) Note and get statements from any witnesses
 - vi) Take photographs of the scene if possible, provides a reference for future questions
 - vii) Consider security cameras for possible video documentation.
 - viii) CMG will manage communications with the injured, their insurance provider, physicians, etc.
 - ix) Parishioners, students and volunteers are not covered by CMG. They are insured by their personal provider or their parent's policy. However when a volunteer, student or parishioner is injured, the same information should be collected as would be collected for an employee injury however the information will be filed and not turned in to workers compensation.
- g) Property Damage Reporting
 - i) Inform CFO, Matt McKillip of the Injury, mmkillip@dol-in.org
 - ii) If damage is significant, contact the DOL Facilities Manager, Andy Guljas, aguljas@dol-in.org
 - iii) Notify CMG.
 - iv) Secure the area from further risk, assure the safety of employees, parishioners, etc.
 - (1) Communicate to Parishioners if/as needed; for example, which entrance is safe to use.
 - v) Document the event; date, time, location, describe damage, photograph the damage, etc.
- h) Legal Liability
 - i) Contact CFO, Matt McKillip as soon as there is a potential for legal action, mmkillip@dol-in.org
- i) Release of Liability
 - i) There may be occasions that it is desired to secure a release of liability
 - (1) For example, adult evening basketball league, group travel, etc
 - ii) Release of Liability Forms are on the CMG web site
- j) Facility Usage/Indemnity Agreement
 - i) The Facility Usage/Indemnity Agreement must be used when non-parish sponsored or affiliated groups request to use parish facilities on a short-term basis; such as 1 day or 1 week
 - ii) Examples: Girl Scouts, Knights of Columbus,

- iii) Parishioner or Non-Parishioner: Wedding, Anniversary, Birthday Party must sign the Agreement
 - (1) In lieu of signing the Facility Usage/Indemnity Agreement, a parishioner or non-parishioner family is eligible to purchase “special event” liability coverage through your parish via Catholic Mutual.
- iv) Please note that funeral luncheons are parish sponsored events.
- v) CMG website has a standard form for the requesting party to sign



Facility Usage
Indemnity Agreement

- k) Certificate of Insurance
 - i) CMG can provide the Parish, Pastorate, School requested Certificates of Insurance.
 - ii) Contact CMG to understand the information CMG will need
 - iii) Allow a minimum of 2 weeks to secure the Certificate
- l) Inspections and Assessments
 - i) Each Parish and School is required to conduct an annual safety self-assessment
 - ii) CMG will conduct on-site safety inspections from time to time (usually every three years).
When CMG does not come on site, the DOO will need to make sure the annual self-inspection form is submitted to CMG.
 - iii) All Parish properties are to be re-appraised in 2025 and a schedule for ongoing appraisals will be established.

23) Worker Compensation – Gregory Appel is the local agency for United Heartland serving the diocese

- a) Only for employee Injury; this applies to all DOL employees, part-time, full-time, teachers, etc.
- b) Does not apply to non-employees; for example, volunteers, parishioners, parents, students
- c) Every attempt must be made to use United Heartland approved providers. Employees are not, in general, to go to their physician or to the ER.
- d) First contact is Benefits Coordinator, Becky Sarver, rsarver@dol-in.org
- e) Becky Sarver will provide the worker compensation accident report form and other guidance through the reporting process.
- f) Submit initial report to Becky Sarver, rsarver@dol-in.org within 24 hours
- g) Secure the injured basic personal information including their description of the accident
- h) Note and get statements from any witnesses
- i) If possible, take photographs of the accident scene and surrounding areas. This provides a reference for future questions.
- j) Consider security cameras for possible video documentation.
- k) Gregory Appel will manage communications with the injured, physician, hospital, etc.
- l) The expectation is for the parties to collaborate with the goal of returning the employee to work as soon as possible. This includes consideration for alternate work as appropriate.

24) Annual Financial Reports - Year End Financial Reports to the DOL and Parishioners

- a) DOL Sage Specialist, Chris Hardenburg, will provide the standard reports required from Sage
- b) Process:

- i) Target closing the year-end books and preparing reports, including sending the required DOL letter and Parishioner communication, no later than March 1.
- ii) Prepare and review the reports with the Finance Council and Pastor
- iii) Once the finance council recommends approval and the Pastor approves the reports, the finance council will need to sign a letter addressed to the CFO declaring their approval of the final reports and listing the dates of the finance council meetings.
- iv) And, following the finance council and the Pastor approval, prepare a communication of the year-end financial results to the Parishioners. It is a best practice to review this document with the Pastor and PLT before publishing to the Parishioners.

25) Policies: Diocese of Lafayette-in-Indiana

- a) All DOL policies can be found at: <https://dol-in.org/policy>

26) Diocese of Lafayette Contacts Information

- a) DOL online directory can be accessed via: <http://dol-in.org/directory>
- b) Key Contacts
 - Finance CFO: Matt McKillip, mmkillip@dol-in.org
 - Finance Controller: - Being Recruited
 - Internal Auditor: Scott Mitchell, smitchell@dol-in.org
 - Accounting System Sage: Christine Hardenburg, chardenburg@dol-in.org
 - Facilities Manager: Andy Guljas, aguljas@dol-in.org
 - Human Resources Director: Jeanne Lausten, jlausten@dol-in.org
 - Payroll and Benefits: Becky Sarver, rsarver@dol-in.org
 - Communications: - Being Recruited
 - Stewardship & Catholic Ministry Appeal: Mike MacNulty, mmacnulty@dol-in.org
 - Ministry Platform: Suzanne Bowser, sbowser@dol-in.org
 - Bishop Doherty Assistant: Rhonda Chyall, rchyall@dol-in.org
 - Vicar General Fr. Ted Dudzinski Assistant: Julianne Dejoie-Pollard, jdejoie-pollard@dol-in.org
 - Superintendent of Catholic Schools: Trudy Young, tyoung@dol-in.org
 - Director of Pastorate Life Services: Missy Krockover, mkrockover@dol-in.org

27) School Choice Scholarships

- a) For more information visit: <https://www.in.gov/doe/students/indiana-choice-scholarship-program/>
- b) Indiana's Choice Scholarship Program provides scholarships to eligible Indiana students in grades K – 12 to offset tuition costs at participating schools.
- c) There are income levels that determine a family's eligibility
- d) The amount of the scholarship award is based on the students home district public school cost of education.
- e) For each student that qualifies, the State of Indiana issues the scholarship amount via ACH per the schedule:
 - i) 50% the last week of October
 - ii) 40% the last week of March, and

- iii) The final 10% the last week of May
- f) There are many details associated with the Choice Scholarship Program.
 - i) Prepared to spend significant time with the website and pursuing questions with those that have experience with the Choice Program.
- g) A copy of the IN.GOV Choice Program FAQ's is pasted below



Choice-FAQ-2024-20
25.pdf

28) SGO – Scholarship Granting Organization - Tax Credit Scholarship Program

- a) For information visit IN.GOV.DOE website, specifically:
<https://www.in.gov/doe/students/indiana-choice-scholarship-program/school-scholarships/>
- b) The School Scholarship Tax Credit Program is authorized in the State of Indiana. Funding for scholarships come from private, charitable donations to qualified scholarship granting organizations (SGOs). Donors (individuals or corporations) are eligible to take advantage of a 50% tax credit.
- c) SGO scholarships may be granted to Indiana students in pre-k through grade 12. Students must meet the following requirements to qualify for an SGO:
 - i) Student must have legal settlement in Indiana;
 - ii) Student must be at least four (4) years old and less than 22 years old by August 1 of the school year that the student is applying; and
 - iii) Student is a member of a household with an annual income of not more than 400% of the amount to qualify for the federal free and reduced-price lunch program.
- d) Meet with the school Principal or another DOO to understand the local program, contacts, amounts available, internal process, etc.



SGO
FAQ-for-Parents-and-

29) Gaming

- a) For more information visit: <https://www.in.gov/igc/charity-gaming/>
- b) There are strict legal requirements related to gaming; for example
 - i) Requires an application / permit in one fashion or another
 - ii) Requires a separate bank account
 - iii) Requires post event documentation be submitted
- c) There are rules related to how and for what the net proceeds can be used.
- d) Communicate to staff and volunteers that they need to keep the DOO in the loop for any gaming activity plans BEFORE having the gaming experience.
- e) The Charity Gaming Basics



Charity_Gaming_Basi
cs.pdf

30) Cemetery

a) Key Contacts

- i) Finance CFO: Matt McKillip, mmkillip@dol-in.org
- ii) Subject Matter Reference: Bob McCreary, bmccreary@dol-in.org

b) Each Cemetery must have a separate bank account

c) Cemetery Bylaws



Constitution and
By-Laws 2023.pdf



Addendum to
Catholic Cemeteries C



Grant of Interment
Rights.pdf



FINAL 2015 RULES
REGULATIONS DIOCE



Catholic Cemetery
Headstones and Merr

d) Sexton Policies and Procedures

Appendix A - Job Descriptions

Director of Operations

Reports To: Missionary Pastor

FLSA Status: Exempt

Prepared Date: 11/28/2021

Summary: The Director of Operations will serve as professional administrator and strategic leader at {your location}. The Director of Operations will work closely with the Missionary Pastor to drive positive financial performance of Center and staff and maintain the campus.

The Director of Operations assists the Missionary Pastor with the stewardship of the human, financial, and physical resources of the Pastorate, in accordance with diocesan policies and guidelines. This role will have responsibility for leadership of operations staff (bookkeepers, office, and maintenance staff).

Essential Duties:

FINANCIAL MANAGEMENT

- Prepares, evaluates, and communicates the Pastorate budgets, annual reports, profit & loss, balance sheet, accounts receivable, accounts payable, and general ledger. Reviews monthly variance reports and reforecasts. Reviews all reports with the Missionary Pastor.
- Ensures proper internal controls are in place and followed.
- Serves as Pastorate representative to banks, manages accounts, and identifies and resolves discrepancies.
- May perform bookkeeping functions including payables/receivables and all other revenue and expenses.
- Oversees large purchasing, contract negotiations and vendor relationships.
- Acts as the staff liaison to Pastorate Finance Council.
- Supports capital campaign pledges and collections, fund raising events, pledge drives, Pastorate offertory collections and stewardship as requested by Pastorate development coordinator.
- Utilizes diocesan best practices and confirms that all federal, state, and local taxes are paid in accordance with federal, state, and local regulation.

BUILDINGS MANAGEMENT

- Manages major repairs, renovations, and capital projects in accordance with diocesan policies.
- Acts as liaison to diocesan administrative agencies.
- Manages custodial maintenance functions.
- Serves as Liaison to the volunteer Facilities Committee and communicates with members to plan projects, budget for future needs, and coordinate with other groups and events on the campus.
- Is responsible for Pastorate security, leasing, rental, use of Pastorate facilities, and acts as a liaison to local government agencies.

HUMAN RESOURCES MANAGEMENT

- Implements diocesan Human Resources policies; following diocesan specific job descriptions and assists with Open Enrollment.
- Oversees the management of the Pastorate office.
- Manages the Pastorate office administrative staff and employee performance, including completion of performance management practices.
- Evaluates administrative support staff through yearly performance reviews.
- Oversees implementation of the guidelines and policies of volunteers.

PROJECT/TEAM MANAGEMENT

- Manages Pastorate project plans; identifies needs and required action, tracks, and communicates status to relevant stakeholders, identifies challenges to plan progress and completion and makes necessary corrections, and implements initiatives as applicable progress and identifies follow-up actions.
- Communicates with all clergy and staff to ensure all necessary information such as project plan status, new assignments, and status of regular responsibilities is communicated to and by team members in a timely manner, identifies and addresses any challenges to progress and success.
- Brings ideas, plans, and best practices to the Pastorate from diocesan meetings.

Qualifications: *To perform this job successfully an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Education/Experience:

- Bachelor's Degree in Business, Accounting, Finance or related area, or equivalent experience.
- At least 3 years' experience in Accounting, Finance, Business, or related area.
- Experience with a non-profit organization or in Church management is a plus.
- Possess Respect & ability to uphold Catholic Church's teachings.
- Possess initiative and a strong desire to achieve results.
- Experience in change management a plus.
- Experience with Microsoft Office.
- Able to honor & maintain confidentiality.
- Able to pass and maintain Diocesan child safety protocols.

Physical Demands: *The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Able to move about the work environment
- While performing this job, the employee is regularly required to talk or hear
- Specific vision abilities required by this job include close vision and ability to adjust focus
- Visual acuity to see computer screen
- Able to move tables and chairs to arrange meeting spaces
- Able to occasionally lift and/or move up to thirty pounds
- Able to lift files, open filing cabinets, and bend or stand on a stool if necessary

Work Environment: *The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Able to work a flexible schedule including nights, evenings, and weekends as required.
- This job operates in an office environment. This role routinely uses standard office equipment such as computers, photocopiers, and smartphones.

Accounting Assistant

Reports To:

Prepared Date: 9/15/2017

FLSA Status: Non-Exempt

Summary: Provides accounting services to a parish, school, or accounting department.

Essential Duties:

- Handles and records incoming cash, credit card transactions and/or other receipts, if applicable.
- Records parishioner and visitor contributions, if applicable.
- Oversee and verify the work of the volunteer counter(s) of the weekly collection.
- Records & maintains journal entries, general ledger, accounts payable & accounts receivable, if applicable.
- Prepares monthly bank reconciliations.
- Assists in preparing financial reports and annual parish and/or school budget.
- Maintains Scrip order system and FACTS tuition management system, if applicable.
- May assist or prepare payroll.
- May perform administrative support for the office.
- Performs special projects as needed.

Other Duties: Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Qualifications: *To perform this job successfully an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Education/Experience:

- Minimum of one year experience in accounting or related position
- Some college preferred
- Very strong organizational and communication skills
- Proficient in Microsoft Word and Excel.
- Experience with a computer-based accounting system helpful.
- Possess respect & ability to uphold Catholic Church Teachings
- Able to honor & maintain confidentiality
- Able to pass and maintain Diocesan child safety protocols

Physical Demands: *The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Able to move about the work environment
- While performing this job, the employee is regularly required to talk or hear
- Specific vision abilities required by this job include close vision and ability to adjust focus
- Visual acuity to see computer screen
- Able to occasionally lift and/or move up to 30 pounds
- Able to lift files, open filing cabinets, and bend or stand on a stool if necessary

Work Environment: *The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Able to work a flexible schedule including nights, evenings, and weekends as required.
- This job operates in an office environment. This role routinely uses standard office equipment such as computers, photocopiers, and smartphones.

Manager of Maintenance

Reports To: Title

FLSA Status: Exempt

Prepared Date: 9/15/2017

Summary: Oversees the maintenance of a clean environment and functioning, safe facilities.

Essential Duties:

- Maintain cleanliness of all facilities, sidewalks, steps, drives, and parking lots.
- Maintain grounds, including snow removal in winter, mowing lawns and pruning bushes and trees in summer, and debris removal year-round.
- Coordinate ordering and purchasing equipment and parts for repairs and get approval for non-routine purchases.
- Supervise all maintenance technicians, custodians, outside contractors, and volunteers who work on projects for the benefit of buildings and grounds.
- Perform or oversee preventative maintenance & minor repairs, including electrical, plumbing, HVAC, etc.
- Monitor facility security.
- Create an annual maintenance budget and ensure operations are within budget.
- Accompany all inspectors (fire, health, insurance, etc.) on their rounds.
- Handle emergency maintenance problems.
- May serve on the facilities committee, if applicable.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Qualifications: *To perform this job successfully an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Education/Experience:

- Supervisory experience.
- Valid Indiana driver's license.
- Mechanical and maintenance skills and knowledge.
- Familiar with e-mail, word processing, and spreadsheets, preferred.
- High School Diploma or equivalent.
- Possess respect and ability to uphold Catholic School Teachings.
- Able to honor and maintain confidentiality.
- Able to pass and maintain Diocesan child safety protocols.

Physical Demands: *The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Able to move about the work environment.
- While performing this job, the employee is regularly required to talk or hear.
- Specific vision abilities required by this job include close vision and ability to adjust focus.
- Able to use basic machinery such as vacuums, snow blowers, lawn cutting equipment, etc.
- Performing general physical activities that require considerable use of arms and legs and moving whole body, such as climbing, lifting, balancing, walking, stopping, and crawling.
- Required to lift or move up to 100 pounds.
- Using hands and arms in handling, installing, positioning, and moving materials, and manipulating things.
- Inspecting equipment, structures, or materials to identify the cause of errors or other problems or defects. May include climbing ladders.

Work Environment: *The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Able to work a flexible schedule including nights, evenings, and weekends as required.
- Work is performed both indoors and out and individual is exposed to extreme hot and cold outdoor weather conditions.
- The work environment may be loud when using machinery and use of ear plugs may be necessary.

Appendix B – Catholic Ministries Appeal

Copied from Mike MacNulty DOO Presentation 10 May 2024

2024 Catholic Ministries Appeal Rebate

Rebates to pastorates

1. The accountability for CMA goals is at the pastorate level
 - This means that the pastorate is accountable for 100% of the total of the goals of all parishes in the pastorate
 - Parishes within a pastorate can help each other reach the total pastorate goal
 - The total donations received from all parishes in the pastorate will be compared to the total goal from all of the parishes
2. Once the pastorate reaches 100% of its total CMA goal in donations, it is eligible for the rebate
 - Rebates are calculated at the pastorate-level, not by individual parish
 - The rebate will be paid to the pastorate once after the end of the appeal

2024 Catholic Ministries Appeal Rebate

Rebates to pastorates

3. The pastorate will receive a rebate of all the donations received over its total CMA goal, however, this rebate is capped at the amount equal to 25% of the total CMA goal across all parishes in the pastorate.

Example 1 – Pastorate under goal:

- a) The total pastorate CMA goal is \$100
- b) Your parishioners donate \$90 (which is 90% of goal)
- c) Your pastorate will owe \$10 at the end of the appeal ($90-100=-10$)

Example 2 – Pastorate over goal, but less than 25% over the goal:

- a) The total pastorate CMA goal is \$100
- b) Your parishioners donate \$115 (which is 115% of goal)
- c) Your pastorate will receive a rebate of \$15 ($115-100=15$)

Example 3 – Pastorate over goal, and over by more than 25% over the goal:

- a) The total pastorate CMA goal is \$100
- b) Your parishioners donate \$130 (which is 130% of goal)
- c) Your pastorate will receive a rebate of \$25 ($130-100=30$, but the maximum rebate is 25% of the goal, or $100 \times .25=25$)

Appendix C – Lafayette Diocese Foundation, Inc

Copied from Mike MacNulty DOO Presentation 2 February 2024

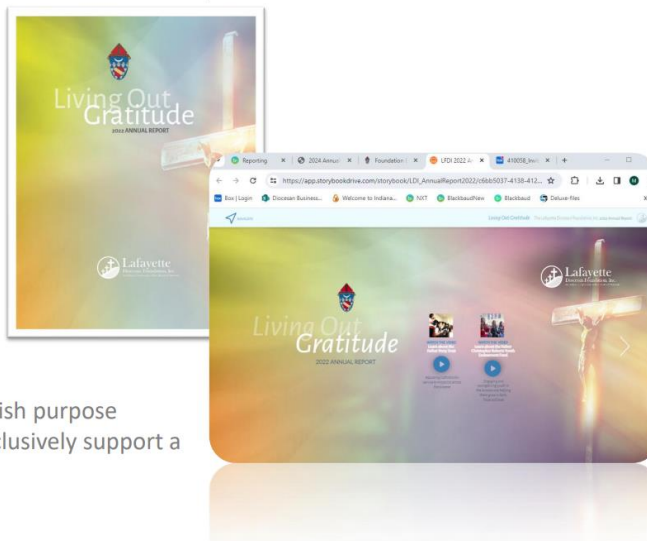
Lafayette Diocesan Foundation, Inc.

What is it?

- A way for donors to give to the Church
- Their donations live into the future
- Separate legal entity
- Board of Directors
- Professional investment management
- Catholic screened

Includes:

- Endowments
 - Legal agreements with founder to establish purpose
 - Annual distribution of typically 5% to exclusively support a named purpose
- Charitable Gift Annuities
- Charitable Remainder Uni-Trust



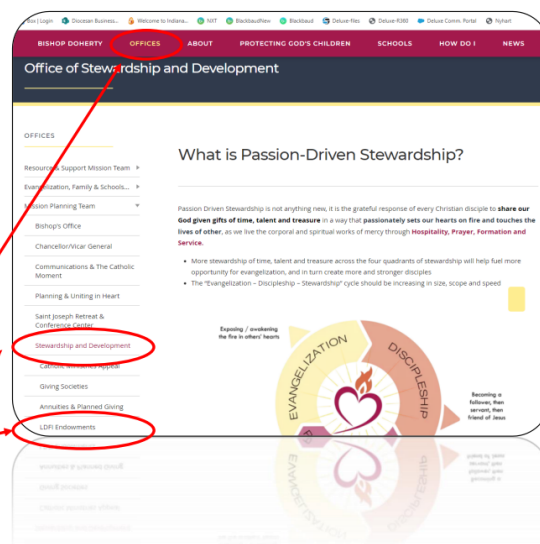
Lafayette Diocesan Foundation, Inc.

How can parishioners participate?

- Anyone can make a donation of any amount to an existing Endowment Fund
- Minimum of \$25K to establish a new Endowment Fund
- Establish a CGA or CRUT

Where can I find out more about the LDFI?

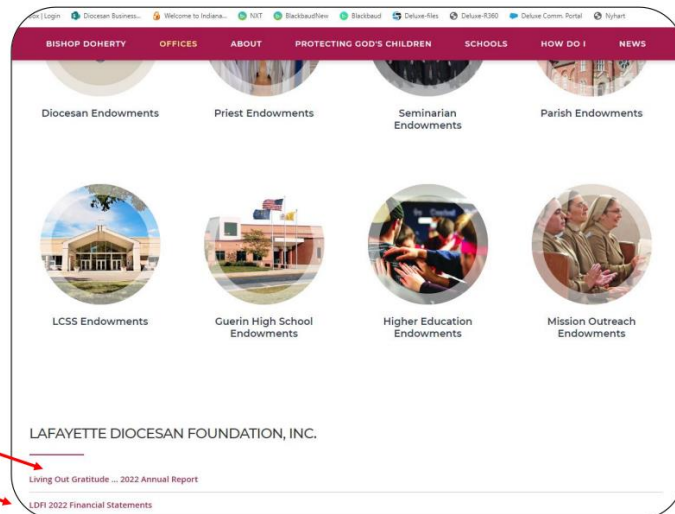
- www.DOL-IN.org
- Offices / Stewardship & Development /LDFI Endowments



Lafayette Diocesan Foundation, Inc.

What can you find there?

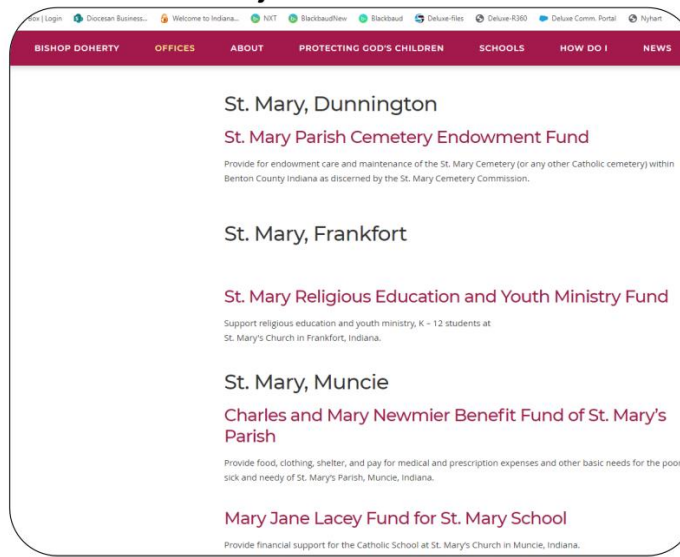
- Listing of Endowments by Category
 - Diocesan Endowments
 - Priest Endowments
 - Seminarian Endowments
 - Parish Endowments
 - LCSS Endowments
 - Guerin High School Endowments
 - Higher Education Endowments
 - Mission Outreach Endowments
- Annual Report
- Audited Financial Statements
- Gift Acceptance Policy



Lafayette Diocesan Foundation, Inc.

What do endowments support?

- Catholic Schools and tuition
- The needy
- Local ministry like faith formation
- Parish buildings and maintenance
- Cemetery maintenance
- Seminarians
- Priests
- Etc.



Appendix D – Resultant IT Services

Services Provided:

- Managed Services
 - Guidance and Client Business Reviews
 - Workstation Patching and Support
 - Cloud Services Maintenance\Monitoring
 - Business App Support
 - Vendor Management
 - Server Maintenance\Monitoring
 - Storage Maintenance\Monitoring
 - Firewall Maintenance\Monitoring
 - Switch Maintenance\Monitoring
 - Wireless Maintenance\Monitoring
 - Technology Maintenance Plan
 - Backup Maintenance\Monitoring\Testing
 - Antivirus Management
 - Managed Printers
- Managed Support (Unlimited)
 - Helpdesk and Escalated Support
 - Remote Technical Support
 - End User Support

Primary Items Not Included:

- Cost of Hardware
 - Resultant to advise on purchases to align to standardization plan
- Network Cabling
 - Resultant does not provide cabling services. We will work with third party providers and manage them for any cabling efforts
- Physical Security (Door Access/Security Cameras)
 - Resultant can provide vendor management and work with providers of this service
- Projects
 - Resultant will use the dedicated service team as much as possible to limit project costs. However, some projects require use of Resultant's engineering staff and in those instances a separate SoW will be created for their efforts
- Student Systems Support

Appendix E – Basic Finance Council Agenda

Finance Council Meeting Preparation

1. Asses the financial statements; identify and be prepared to discuss the major variances in both revenue and expense; and, are there any significant changes to cash or investment balances.
2. Know what, if any, input/direction is needed from the Council; for example, does the council
 - a. need to recommend moving money from an investment account to cash,
 - b. need to review, recommend any capital project spending,
 - c. need to review and recommend that the Pastor approve the proposed budget,
 - d. recommend approving and forwarding the YE financial statements, etc
3. Have proposed next meeting dates ready for review, discussion, approval.

Finance Council Agenda

- 1. Opening Prayer**
- 2. Minutes from Previous Meeting**
- 3. Financial Review**
 - a. Income Statement
 - b. Balance Sheet
 - c. Cash Balance & Cash Forecast
 - d. Investment Balance
 - e. School or Pastorate Financial Update
- 4. Other / Special Topics (examples)**
 - a. Catholic Ministries Appeal Status
 - b. Capital Project(s) Updates (ongoing or new)
 - c. Budget Preparation for Next Year
 - d. Year End Financial Report to DOL and Parishioners
 - e. Organizational Updates (vacancies, etc)
 - f. Pastoral Council Report
 - g. Sub-committee Discussion
- 5. Pastor Comments**
- 6. Next Meeting Date(s)**
- 7. Closing Prayer**

Appendix F – Accident Report

INCIDENT REPORT

* = REQUIRED FIELD

*Name of Party Involved: _____

Student? YES / NO If Student, Parent Name (s): _____

*Address: _____

*City: _____ *Zip: _____

*Phone Number: _____ *Work Number: _____

*email: _____

*DOB (MM/DD/YYYY): _____ *SS#: _____

*Injury/Damage: _____

*Date of Accident (MM/DD/YYYY): _____ Time of Accident (ex. 10:00 A.M.) : _____

Where accident occurred: _____

Were photographs taken? YES/ NO (see attached)

Was an ambulance called? If so, by whom? _____

Describe Accident:

Witnesses Statement (Please include name, address and phone number):

Comments: Instructions: • Attach photographs, and/or additional pages as needed • Send completed form with attachments to Pastorate Director of Operations

Appendix G – Code of Conduct

Diocese of Lafayette-in-Indiana Code of Conduct (Revised January 3, 2019)

As a community of faith, we are committed to safeguard our children and youth, the most important gifts God has entrusted to us. The following rules and regulations reflect that commitment and apply to clergy, employees, and volunteers.

I will:

- Safeguard children and youth entrusted to my care at all times.
- Treat everyone with respect, patience, integrity, courtesy, dignity, and consideration.
- Complete Safe and Sacred child protection training and read quarterly online articles.
- Avoid situations where I am alone with a child or youth at church/school activities.
- Refrain from giving inappropriate, personal gifts to children or youth.
- Avoid all unnecessary physical contact, especially when alone with a minor.
- Obtain permission from a parent or guardian before contacting a minor via social media or before posting pictures, video, and other information that may identify a minor.
- Always maintain a professional attitude when dealing with minors, avoiding emotional attachment and being aware of the powerful attraction of adults in positions of authority.
- Report suspected child abuse to civil authorities (Indiana Department of Child Protective Service 800-252-5400) or to a local law enforcement agency.
- Call Jackie Montrie M.A., LMFT, LMHC Victim Assistance Coordinator of the Diocese of Lafayette-in-Indiana at (765) 464-4988.
- Cooperate fully in any investigation of abuse of children and/or youth.

I will not:

- Communicate any views contrary to the teachings of the Catholic Church.
- Use, possess, or be under the influence of alcohol while overseeing youth at any church/school activities.
- Use, possess, or be under the influence of illegal drugs
- Allow minors to have and/or use alcohol or illegal drugs
- Use profanity or engage in behavior that is harassing or degrading to others.
- Allow minors to have, or assist them in gaining access to, pornographic or inappropriate websites, movies, or printed materials.

I certify that I have read and understand the Diocese of Lafayette's Code of Conduct in its entirety and will adhere to it. I understand that the Code of Conduct does not supersede canon or civil law and establishes appropriate ethical standards for ALL personnel who minister and work in the Diocese. I confirm that I have completed and submitted the background check application.

Name

Date