

Diocesan Programs and Services

The Office of Financial Services provides various programs and services to aid in the financial administration of your parish:

- 1. General Inquires** - The Financial Services staff can assist you with the majority of your accounting and financial questions. Additionally, Financial Services should be contacted if you encounter financial questions concerning other diocesan policies or programs.
- 2. Parish Financial Evaluation Program** - Parishes are periodically evaluated by the Director of Parish Financial Services. The purpose of the program is to help ensure that the temporal goods of a parish are properly safeguarded and managed efficiently. The program also helps ensure that parishes are completing the annual financial report in a proper and consistent fashion. When a parish is selected for an evaluation, it is generally given at least a one-month notice. It is the expectation that all churches will be visited over a five or six-year cycle. The Director of School Finance evaluates the elementary school in those parishes where this is applicable.
- 3. Catholic Deposit and Loan Fund of Northwest Pennsylvania, Inc.** - The Fund accepts deposits from parishes and other Catholic entities enabling other parishes and other Catholic entities that need to borrow money for various projects. Except for endowments, generally 50% of parish, school, and cemetery reserves should be on deposit. Please refer to page 9-1 for information regarding the determination of the deposit and loan interest rates. A booklet is available which describes the program in detail. Interest paid on deposits is not subject to Diocesan assessment calculations.
- 4. Information Technology Office** - All parishes should have their own (or share) a computer system. The Parish Data System Church Office Management census and contribution software is required including any approved updates and replacement software. An accounting software program such as QuickBooks is recommended. If your parish is considering upgrading its computer and would like more information concerning parish computer systems, please contact Kathy Papalia. Please note that all parishes in the Diocese of Erie are expected to have an e-mail address. Faxes are no longer required.
- 5. Diocesan Web Site** - You are encouraged to periodically visit the site at www.eriercd.org to keep current on parish financial matters. The current version of the *Parish Financial Practices Policy Manual*, report forms, and other financial information are available for downloading from the site.
- 6. Facilities and Risk Management Office** - Serves as a resource to parishes on physical plant matters and concerns such as loss control, employee safety and accident prevention, and environmental and regulatory compliance. Evaluates and provides assistance related to construction and renovation projects when appropriate.
- 7. Human Resources Office** - Offers assistance and advice to parishes and diocesan organizations on personnel practices and employment issues such as hiring, compensation, performance measurement, discipline, and termination (please go to www.eriercd.org/hr.asp for additional information).
- 8. Diocese of Erie 401(k) Lay Retirement Plan** - Please visit eriercd.org, Financial Services, 401(k) Plan, for employer and employee information including the enrollment forms and the investment options. Participant distribution and rollover requests should be directed to

Fidelity Investments at 1 (800) 343-0860 or fidelity.com/atwork.

- 9. Health Insurance** - Lay employees of parishes and other diocesan organizations may be enrolled in the diocesan group health insurance plan. The current plan contract -PPO Blue- is with Highmark Blue Cross Blue Shield. Parishes in the diocese provide this as a benefit for their employees working 30 or more hours a week. The rates and amounts of expected premium contribution vary depending on the coverage option selected and whether family members of the employee are to be included. Information concerning benefits available under the plan, enrollment procedures, etc. may be obtained from the plan manager, HUB International at (814) 454-0167 or (800) 777-2524.
- 10. Unemployment Compensation** - A program, administered by the Pennsylvania Catholic Conference, is generally available to all parish and school employees. Unemployment questions including the payment of any billings from the State should be directed to the Office of Financial Services or the Pennsylvania Catholic Conference at (717) 238-9613.
- 11. Protected Self-Insurance Program**
 - A. For property and liability insurance claims call Gallagher Bassett Services at (800) 779-2980. For changes in property or auto coverage, billings, and other insurance questions, and Certificate of Insurance requests please contact Waldorf Risk Solutions at (631) 418-0314. For Workers Compensation cases call Travelers Insurance at 412 338-3157.
 - B. Please be aware that all outside private individuals and organizations holding functions on parish property are expected to purchase Events Insurance coverage or provide a Certificate of Insurance with a minimum amount of general liability coverage of \$1,000,000. The Certificate is to name both the parish and the Diocese of Erie as certificate holders and, if possible, as additional insureds. The Event Insurance forms can be obtained directly from the Office of Financial Services or by visiting eriercd.org, clicking on Diocesan Offices, then Financial Services.
 - C. Please refer to page 13-1 for additional insurance information.
- 12. The Catholic Foundation of Northwest Pennsylvania** was established in 2007 for the purpose of supporting the religious, educational, and pastoral ministries of the Diocese of Erie through investing the gifts of donors who wish to make a lasting difference. As such, the Foundation is prepared to assist donors in fulfilling their philanthropic goals through various types of giving options.
- 13. Increased Offertory Programs** - Resources and materials are available from the Catholic Foundation of Northwest Pennsylvania for parishes who may be interested in increasing their offertory income through Sacrificial Giving, tithing, and other means.
- 14. Fundraising activities, including Capital Campaigns that are expected to raise a net total of \$10,000 or more require the approval of the Diocesan Bishop** and are to be conducted in accordance with the Diocesan Fundraising Instruction located in the appendix at page A-20. Student led efforts to raise monies and applications for grants are excluded from this policy.