



ARCHDIOCESE OF INDIANAPOLIS

The Church in Central and Southern Indiana

2015 FISCAL MANAGEMENT AND DISCIPLESHIP CONFERENCE

SPONSORED BY FIFTH THIRD BANK

Wednesday, June 17, 2015

Roncalli High School

Indianapolis, Indiana

- ◆ Financial Management
- ◆ Stewardship
- ◆ Accounting Techniques
- ◆ Human Resources Issues

Program hosted by:

Most Rev. Joseph W. Tobin, C.Ss.R.

The workshops will be hosted by the offices of:

- ◆ Accounting Services
- ◆ Risk Management
- ◆ Stewardship and Development
- ◆ Catholic Education
- ◆ Human Resources

This Conference is targeted at:

- ◆ Priests
- ◆ Bookkeepers
- ◆ Business Managers
- ◆ Finance Volunteers
- ◆ School Commission Chairs
- ◆ Principals
- ◆ High School Presidents

Event

Participant Registration

8:00 - 9:00

Mass led by Archbishop Tobin

9:00

General Session

10:00 - 11:15

Networking break

11:15 - 11:30

Workshop Session A

11:30 - 12:30

Lunch

12:30 - 1:15

Workshop Session B

1:15 - 2:15

Networking break

2:15 - 2:30

Workshop Session C

2:30 - 3:30

Networking break

3:30 - 3:40

Workshop Session D

3:40 - 4:40

FMDC 2015– Workshop Sessions

Human Resources and Legal/Compliance Matters Update

Ginger Thomas, Human Resources

Jay Mercer, Legal Counsel

The presenters will be discussing a wide range of topics including compliance with Department of Labor standards, personnel issues that require legal counsel, best practices for evaluating contracts and the importance of annual personnel reviews. Learn how creating a compliance culture can benefit your parish and the Archdiocese as a whole for years to come.

Suggested Audience: Pastors, Business Managers, Principals, Finance Council/School Commission Members

Payroll and HRIS Tips and Tricks

Andrea Wunnenberg, Human Resources Operations Manager

Carey Kendall, Supervisor, Parish and Agency Services

This session will include an overview of Paylocity's payroll and HRIS system including the move to time and attendance. You'll hear about the implementation process and best practices for a successful implementation and on-going payroll processing and ACA reporting. We will help you understand who to reach out to with questions, Paylocity, Central Payroll or Human Resources.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Accounting Guidance and Bookkeeping Best Practices

Representative from Agresta, Storms & O'Leary CPA Firm

This session will include general accounting topics such as: bookkeeping best practices, tax forms and reports, budget preparation, the Archdiocesan Monthly Assessment; depositing and withdrawing from the Archdiocesan Deposit and Loan Fund; PAFR; Archdiocese Website and who to contact in OAS.

Suggested Audience: Business Managers, Bookkeepers, Finance Counsel Members

Charity Gaming

Representative from Indiana Gaming Commission

This session will focus on the qualification requirements to conduct charity gaming in the State of Indiana. When is a license required and when does an organization need only to apply for and receive approval to conduct a charity gaming event. Learn how to fill out your required reports including when reports are due, what information needs to be reported, and what records need to be retained.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Growing your Ministry through Planned Gifts and Endowments

Ellen Brunner, Director, Catholic Community Foundation

Joanna S. Feltz, J.D., Director of Planned Giving

Would you like to learn about a charitable gift that benefits your Ministry and your supporter? This session is an overview of how you can raise support for your ministry and provide your donors with a charitable tax deduction and a lifetime stream of annual income through a charitable gift annuity. Learn how to use the resource toolkit provided and available to every ministry to help sustain the work of your ministry. A practical approach will be shared. Come and learn the long term benefits of nurturing and growing your ministry endowment.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

The Archdiocese's Response to Indiana's Tax Credit Scholarships and Indiana Vouchers

Chris Brunson, Director of Finances, Mother Theodore Catholic Academies
Erich Bangert, Office of Finance, Special Projects

There has been no greater time to plan for the future sustainability of our Catholic schools! This past year alone, \$6.1 million was raised to provide tax credit scholarships (TCS) in the Archdiocese, awarding approximately 2,200 students this year alone. Additionally, 6,775 students received state vouchers in 2014-15, generating \$27.6 million to pay tuition/fees. During this session participants will learn about the TCS process and benefits to donors and families. We will also cover ways to plan for the sustainability of schools beyond these funding sources. Finally, we will share the current status of voucher legislation in the state of Indiana and the Archdiocese's approach to voucher compliance in all Catholic schools. We will share a helpful guidance document along with the internal compliance plan that has been established.

Suggested Audience: Pastors, Business Managers, Principals, Finance Council/School Commission Members

STRATEGIC PLANNING: Using the National Standards and Benchmarks of Effective Catholic Schools

Gina Fleming, Superintendent of Catholic Schools

Is your parish school seeking ways to better align all of its practices to our Catholic faith? Is your school leadership and commission developing or operating from a strategic plan that addresses Mission and Catholic Identity, Academic Excellence, Operational Vitality, and Leadership/Governance? Do you simply want to learn how accreditation, strategic planning and school improvement plans correlate? If so, please participate in this session to learn more about effective strategic planning in Catholic schools.

Suggested Audience: Pastors, Principals, School Commission Members

STEWARDSHIP: The parish renewal and how a Stewardship Committee can benefit your parish

Jolinda Moore, Director of Stewardship and Development

Explore the ways in which your parish can engage parishioners in renewal of time, talent and treasure activities. For many parishes that have "split" the United Catholic Appeal from the parish renewal efforts, this is a great way to learn more about how to conduct your own renewal. Best practices and examples from other parishes will be showcased as take-away items that you can use. Has your parish wondered what is the purpose of a stewardship committee and how do you start one? Many parishes seek a greater understanding of the role a stewardship committee plays within the parish. They are often curious as to how to get such a committee up and running. Exploring best practices and examples from other parishes, this session will help explain how a stewardship committee can become an essential component in parish ministry.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Parish Budgets and Risk Management – Lessons Learned in the Field

Mike Witka, Director, Risk Management

Much of my time is spent working with parishes/schools on budget items. A lot more time is spent with parishes helping them understand how to avoid risks. Come to the sessions for discussions of both. Join Mike Witka to get the latest information on these and other risk management topics.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Parish Internal Control Audits (PICA)

Representative from Yount and Company, LLC

This session will include a discussion of the most common PICA findings, parish best practices, guidance on how to prepare for a PICA and the importance of utilizing the PICA report to create a plan of action for improvement.

Suggested Audience: Pastors, Business Managers, Bookkeepers, Finance Council Members

Workshop Sessions

The workshop sessions will be structured in the following manner: A 15-20 minute presentation will be made relating to the topic and the presenters will then facilitate group discussion to allow for a sharing of information and ideas.

<p>Workshop Session A Topics ~ 11:30 am</p> <ol style="list-style-type: none"> 1. HR-HR and Legal update 2. OAS-Bookkeeping 3. CCF-Planned Giving 4. OCE-Strategic Planning <p>Workshop Session B Topics ~ 1:15 pm</p> <ol style="list-style-type: none"> 1. OAS-Charity Gaming 2. OCE-Indiana's Tax Credit Scholarships and Indiana Vouchers 3. OSD-Parish Stewardship Renewal 4. Risk-Risk Management Update 5. HR-Payroll and HR tips and tricks 	<p>Workshop Session C Topics ~ 2:30 pm</p> <ol style="list-style-type: none"> 1. HR-Payroll and HR tips and tricks 2. OAS-Charity Gaming 3. OAS-PICA 4. OSD-Parish Stewardship Renewal <p>Workshop Session D Topics ~ 3:40 pm</p> <ol style="list-style-type: none"> 1. OAS-Bookkeeping 2. OAS-PICA 3. OCE-Indiana's Tax Credit Scholarships and Indiana Vouchers 4. CCF-Planned Giving
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Registration for Conference

Parish Name _____
 Parish # _____

Participants

Name _____ Role _____
 Telephone # _____ Email _____
 Workshop Choices: A _____ B _____ C _____ D _____
 CPE Certificate Needed: Yes or No PGPPoints Needed: Yes or No

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Registration fee is sponsored by Fifth Third Bank. Registration is available online at www.archindy.org/fmcd. If you do not wish to fill out an online registration, then all registration forms must be received by June 9, 2015 to:

Archdiocese of Indianapolis
Attn: Carey Kendall
Office of Accounting Services
P.O. Box 1410
Indianapolis, IN 46206-1410

You may also email your registration forms to Carey Kendall at ckendall@archindy.org or fax to (317) 236-7327

For more information, please contact Carey Kendall in the Office of
 Accounting Services by phone: (317)261-1519 or email: accountingservices@archindy.org