

**Archdiocese of Baltimore
Parish/School Management In-Service Day
Loyola College – Timonium Graduate Center
Wednesday, May 17, 2017
8:00 AM – 2:30 PM**

SESSIONS DESCRIPTIONS

Session 1: Planning for Capital Maintenance

Presenters: Nolan McCoy, Director, and Christin Kinman, Project Manager, Division of Facilities and Real Estate Management

This session will explain the long-term cycle of planning for capital maintenance. Participants will learn the process of understanding their facilities through a 10-year Facilities Condition Inspection/Capital Reserve study, planning to fund capital projects in operations budget, and when and how to run a capital campaign when routine operational budgets are not enough.

Session 2: Parish and School Consolidated Financials

Presenter: Ashley Conley, Director, School Finance

This presentation will review parish and school enrollment and operating results for the fiscal year ended June 30, 2016 so that participants can gain an understanding of the State of the Archdiocese. The presentation will include statistical data for parishes and schools that can be used in their budgeting and financial planning process.

Session 3: HR – Ultimate Time Management, Talentstream Applicant System, Electronic I-9

Presenter: Joe Smith, Executive Director, Department of Human Resources

The Department of Human Resources will be presenting three demonstrations during this session: Ultimate Time Management, Talentstream (Career Builder) Applicant System, and Electronic I-9.

Session 4: Results of the Division of Fiscal Services Roundtable Discussions

Presenter: John Matera, Controller/Director, Division of Fiscal Services

This session will summarize accounting issues identified as part of the roundtable process and action items being pursued as a result. Roundtable discussions were focused on two areas: changes needed to our existing policy and procedures for parish/school accounting; and what changes will be necessary as we begin to organize around Pastorates. Known changes to the Uniform Parish and School Chart of Accounts will be provided with guidance on how to add or edit the existing Parish/School QuickBooks Online chart of accounts. Key concepts and guidance on Pastorate accounting will be discussed as a group.

Session 5: IT/Development – Parish Offertory

Presenters: Dan Honemann, Director of Business Intelligence, Ron Hurt, PIMS Manager, Division of Information Technology, and George Reed, Director, Department of Development

The Development Department has been working in collaboration with the Archdiocesan IT and Finance Departments to establish standardized procedures to enter and track financial data. The Take the Next Step program timeline will also be rolled out for 2017.

ANNOUNCEMENT SEGMENT

HR

Called to Serve Training

Strength Finders

UltiPro System Update

Status/Update on FLSA regulations