

ORGANIZATIONAL POLICIES AND PROCEDURES  
OF  
ST. MARY CATHOLIC FAITH COMMUNITY  
9520 West Forest Home Avenue  
Hales Corners, WI

Effective September 1, 2004

The intent of this document is to communicate to the various organizations of St. Mary Parish the policies and procedures that must be followed when carrying out their plans. This document clearly defines their responsibilities, manner of operation and expectations.

These policies and procedures apply to all organizations of St. Mary Parish that are specifically sponsored by the parish, including commissions, committees, and affiliated organizations. Commissions and committees are permanent boards established by parish council by-laws. An affiliated organization is any group of parishioners or a group sponsored by parishioners that participates in the mission of the parish, uses the name of the parish for identification, and is not organized separately from the parish. All parish-affiliated organizations are established in the parish by-laws, or by separate action of the parish council. Affiliated organizations are accountable to the parish, usually through the parish council or one of its committees.

Organizations such as the Home and School Association and Athletic Association are usually established as affiliated organizations. Organizations that have their primary affiliation with another organization, such as Cub Scouts, Boy Scouts, Girl Scouts, or St. Vincent de Paul, yet use the parish as a sponsor or for identification, are not considered affiliated organizations. Any other group that is not sponsored or authorized by the Pastor is not an affiliated organization.

I. SPIRITUAL:

All organizations that meet as part of our St. Mary Catholic Faith Community must have an emphasis on "Faith First." All meetings at St. Mary must include a time of reflection on the upcoming Sunday's gospel. The gospel passage can be found in our Sunday bulletin or on the St. Mary web site. Parish Council liaisons can help facilitate these reflections and can provide resources to help incorporate prayer into meetings. A suggested meeting format follows:

- Opening Prayer
- Scripture Reading (Next Sunday's Gospel)
- Shared Reflections
- Prayers of the Faithful
- (Meeting Business)
- Closing Prayer: The Lord's Prayer
- Sign of Peace

II. ORGANIZATIONAL:

- a) Organizational documents, such as Constitution, By-Laws and Mission Statement, if available, must be on file in the Parish Office. An annual updated list of officers, their addresses, telephone numbers, and e-mail addresses must be on file in the Parish Office.
- b) Each organization will strive to obtain age, gender and cultural diversity representation.
- c) Each organization is responsible to have a working knowledge of the parish's mission, goals, and objectives and shall create goals that are congruent with the overall parish goals. Organizations should submit any goals and measurable objective action plans they create to the Parish Council by October 1<sup>st</sup> of each year.
- d) Organizations formed after August 31, 2004 must file a written request with the Parish Council to use the name "St. Mary."
- e) Non-sponsored organizations that use Parish facilities must obtain the approval of the Pastor to use Parish facilities.
- f) The Parish Office or Parish School should be used as the official mailing address of each organization.
- g) It is the responsibility of the out-going chairperson of each organization to inform and acclimate the new chairperson to the Organizational Policies and Procedures.

- h) When signing documents on behalf of St. Mary Parish, officers must indicate the name of their organization and their individual title.

III. COMMUNICATION:

- a) Organizations are encouraged to take meeting minutes, and should provide copies of their approved meeting minutes to the Parish Office within two weeks after approval.
- b) After reviewing the needs of an active organization, a Parish Council member may be appointed as liaison between the Parish Council and the organization.
- c) Organizations must submit a schedule of planned facility use to the Parish Administrative Assistant by May 15<sup>th</sup> of each year for the next fiscal year's use. Please refer to the "Rules and Regs for Using St. Mary's Facilities" for additional information.
- d) Members of each organization are encouraged to attend a yearly planned one-day formational retreat.

IV. FINANCIAL:

- a) At all times the organization should have a Treasurer, elected or appointed in accordance with adopted By-Laws. This position will be responsible for maintaining all financial records and documents necessary to account for any and all operating activities of the organization. He/she should be comfortable with maintaining a checkbook and summarizing financial information, preferably using an electronic spreadsheet.
- b) The parish and the Archdiocese strongly recommend that all deposits and expenditures within the parish budget be processed through the parish's general bank account as maintained by the Parish Finance Manager. Maintaining a separate bank account in the name of the organization is permitted but not preferred.
- c) In the event the organization maintains a separate bank account, the following is required:
  - i. All checking and savings accounts should be with St. Mary Parish's primary bank.
  - ii. Two or three officers of the organization should be given check signing authority on any account, by the adoption of an official resolution of the organization for that purpose. The Pastor must also have check signing authority on any account.
  - iii. All checks require the signature of two authorized check signers.
  - iv. All monthly bank statements must be reconciled to the checkbook by the Treasurer or other officer of the organization within two weeks of their receipt from the bank.
  - v. A statement of cash receipts and expenses for the organization must be prepared for the six months ended December 31<sup>st</sup>, and for the six months ended June 30<sup>th</sup>. The statement must be forwarded to the Parish Finance Manager no later than January 31<sup>st</sup> and July 31<sup>st</sup>, respectfully. This information is necessary for the completion of the Parish's annual financial report to the Archdiocese. Preparation of quarterly statements is encouraged.
  - vi. If an organization under the auspices of the parish prepares an annual budget of expected receipts and expenditures, a copy of the budget should be sent to the Parish Finance Committee for its review. A member of the organization is encouraged to formally present the budget at a meeting of the Finance Committee as soon as practicable following the adoption of the budget by the organization, but prior to the end of the current fiscal year. The purpose of the Finance Committee review is not to officially approve the budget but rather to make advisory recommendations back to the organization, taking into account parish-wide spending priorities and needs.
- d) Expenditures on items not expected to be consumed within one year's time (capital expenditures) must be approved prior to their purchase by all organizations included in the parish budget. The level of approval for all St. Mary Parish capital spending is dependent on the amount of the expenditure, as follows:

Amount of capital expenditure	Level of approval required
\$500 and under	Committee only
\$501 to \$5000	Pastor
\$5,001 to \$30,000	Parish Council
\$30,001 and above	Archdiocese