



DIOCESE OF METUCHEN DEPARTMENTAL PASTORAL PLANS

Office

Office of Cemeteries

Mission Statement

The Office of cemeteries assists the Bishop of Metuchen in exercising the Corporal Works of Mercy of burying the dead by ensuring a proper burial for all baptized Catholics, reaching out to our families in their time of need and supporting all parishes with cemeteries in their exercise of the Corporal Works of Mercy of burying the dead.

Vision Statement

The Office of Cemeteries in addition to the Corporal Works of Mercy of burying the dead provides families with spiritual and grief support during and after their time of need. The Office of Cemeteries also assists our clergy by offering them assistance in areas of need in the committal process of the Rite of Christian Burial.

Three-Year Goals

- 1 Develop a cemetery newsletter.
- 2 Develop cemetery employee seminars as to the cemetery mission statement.
- 3 Review and alter as necessary office personnel and procedures.
- 4 Develop relationships with funeral directors.
- 5 Review all cemetery operations in view of ICCFA safety procedures.
- 6 Explore catechetical opportunities for cemetery families.
- 7 Tie cemetery advertising to the cemetery mission.
- 8 Build relationships with market area pastors.
- 9 Develop public relations/pastoral programs.
- 10 Clarify role of Director in the eight disciplines of cemetery management.
- 11 Increase revenues of both cemeteries.

** Note: The highlighted Goals & Objectives support the Diocesan effort to “Embrace Unity in our Diversity”.*

One Year Objectives

Goal 1: Develop a cemetery newsletter.

	Objective	Person Responsible	Date Due
1	Meet with communications for input.	Mary Ellen Gerrity	Dec 31, 2011
2	Poll other Diocese that have newsletters for their suggestions.	Mary Ellen Gerrity	Dec 31, 2011
3	Determine the frequency of publication.	Mary Ellen Gerrity	Dec 31, 2011
4	Determine the best method of distribution i.e. mail, parish bulletins.	Mary Ellen Gerrity	Dec 31, 2011

Goal 2: Develop cemetery employee seminars as to the cemetery mission statement.

	Objective	Person Responsible	Date Due
1	Meet with entire staff to discuss the mission of the cemetery office.	Mary Ellen Gerrity	June 30, 2012
2	Insure that the cemetery mission is constantly in line with supporting the Diocesan mission statement.	Mary Ellen Gerrity	June 30, 2012
3	Integrate other offices mission statements through discussions with other offices.	Mary Ellen Gerrity	June 30, 2012

Goal 3: Review and alter as necessary office personnel and procedures.

	Objective	Person Responsible	Date Due
1	Review all current office procedures with respect to the "family first" attitude.	Mary Ellen Gerrity	June 30, 2012
2	Work in conjunction with human resources to assure compliance with diocesan general personnel rules.	Mary Ellen Gerrity	June 30, 2012
3	Assure that all office personnel keep up with training such as HMIS, and that any new hires are trained as well.	Mary Ellen Gerrity	May 31, 2011

Goal 4: Develop relationships with funeral directors.

	Objective	Person Responsible	Date Due
1	Meet one on one with at least 12 of our area funeral directors to discuss the needs of the families they serve.	Mary Ellen Gerrity	Dec 31, 2011
2	Based on the meetings determine if any policies and procedures need to be changed at the cemeteries.	Mary Ellen Gerrity	Dec 31, 2011
3	Implement any changes at the cemeteries that may be necessary.	Mary Ellen Gerrity	Jan 31, 2012

Goal 5: Review all cemetery operations in view of ICCFA safety procedures.

	Objective	Person Responsible	Date Due
1	Review all current field operations.	Mary Ellen Gerrity John Galambos	June 30, 2012
2	Have our insurance inspector offer assistance in the review process.	Mary Ellen Gerrity	June 30, 2012
3	Develop a new safety procedures manual.	Mary Ellen Gerrity	June 30, 2012
4	Implement changes as necessary.	Mary Ellen Gerrity John Galambos	June 30, 2012
5	Develop a checklist to assure all safety procedures are being followed.	Mary Ellen Gerrity John Galambos	June 30, 2012

Goal 6: Explore catechetical opportunities for cemetery families.

	Objective	Person Responsible	Date Due
1	Meet with pastoral life to determine what catechetical areas can be developed for the cemeteries.	Mary Ellen Gerrity	June 30, 2012
2	Determine how the new opportunities /programs can best be integrated into cemetery operations.	Mary Ellen Gerrity	June 30, 2012
3	Communicate the new opportunities to our families.	Mary Ellen Gerrity	June 30, 2012

Goal 7: Tie cemetery advertising to the cemetery mission.

	Objective	Person Responsible	Date Due
1	Poll other Diocese to discuss if this is being done and if so how.	Mary Ellen Gerrity	Dec 31, 2011
2	Meet with our current vendors to get their input.	Mary Ellen Gerrity	Dec 31, 2011
3	Meet with sales staff for their input.	Mary Ellen Gerrity Jeff Moruzzi Mary Ellen Gerrity	Dec 31, 2011
4	Disseminate new mission oriented advertising.	Mary Ellen Gerrity	Dec 31, 2011

Goal 8: Build relationships with market area pastors.

	Objective	Person Responsible	Date Due
1	Have initial meeting to determine what issues if any the pastors have with the Diocesan cemeteries.	Mary Ellen Gerrity John Galambos Sales & Office staff	Dec 31, 2011
2	Address all concerns and implement fixes as necessary.	All staff	Dec 31, 2011
3	Have period continuing meetings to assure all concerns are being met, and new ones are addressed.	All staff	Dec 31, 2011
4	Have sales staff make parish visitations in all market area parishes to promote sales to increase revenues.	Sales staff	Dec 31, 2010

Goal 9: Develop public relations/pastoral programs.

	Objective	Person Responsible	Date Due
1	Meet with pastoral Life to coordinate efforts for pastoral programs that will affect the cemetery programs.	Mary Ellen Gerrity	June 30, 2012
2	Meet with communications to get input on a public relations campaign.	Mary Ellen Gerrity	June 30, 2012
3	Contact outside vendors to assist in a public relations campaign.	Mary Ellen Gerrity	June 30, 2012
4	Implement the new pastoral programs.	Mary Ellen Gerrity	June 30, 2012
5	Start and continue the public relations campaign.	Mary Ellen Gerrity	June 30, 2012

Goal 10: Clarify role of Director in the eight disciplines of cemetery management.

	Objective	Person Responsible	Date Due
1	Meet with various department heads to get an understanding of their operation that affects cemetery operations.	Mary Ellen Gerrity	June 30, 2012
2	Poll other Diocese to see if and how the disciplines are integrated in their operations.	Mary Ellen Gerrity	June 30, 2012
3	Integrate the areas of the eight disciplines not currently within the purview of the Director.	Mary Ellen Gerrity	June 30, 2012

Goal 11: Increase revenues of both cemeteries.

	Objective	Person Responsible	Date Due
1	Through polling other Diocesan cemetery operations to determine whether the current sales staff should be increased, and by what number.	Mary Ellen Gerrity	Dec 31, 2011
2	Review the current sales incentive to see if and how it should be adjusted.	Mary Ellen Gerrity	Dec 31, 2011
3	Increase the offerings of memorial products to our families.	Mary Ellen Gerrity Sales staff	Dec 31, 2011
4	Determine the frequency and rate of price increases.	Mary Ellen Gerrity Sales staff	Dec 31, 2011



UDIOCESE OF METUCHEN DEPARTMENTAL PASTORAL PLANS

Office

Office of Finance

Mission Statement

The Office of Finance assists the Bishop of Metuchen by providing proactive financial services and guidance, promoting sound fiscal policies and procedures throughout the Diocese of Metuchen.

Vision Statement

The Office of Finance continues to foster an environment of financial stability of all entities within the Diocese meeting both current and future need.

Three-Year Goals

- 1 Evaluate and implement shared financial services for parishes and schools.
- 2 Evaluate, enhance and support the role of Parish Business Managers.
- 3 Evaluate and enhance the internal control structure related to financial transactions at the Diocesan level.
- 4 Evaluate and enhance the internal control structure related to financial transactions at the parish and school level.
- 5 Evaluate and enhance the structure and use of Finance Councils at the parish level.
- 6 Coordinate the financial service activities for the Diocese.
- 7 Coordinate activities with the Diocesan Council for Financial Affairs and its subcommittees to assist the Bishop with Diocesan operations.

*** Note: The highlighted Goals & Objectives support the Diocesan effort to “Embrace Unity in our Diversity”.**

One Year Objectives

Goal 1: Evaluate and implement shared financial services for parishes and schools.

	Objective	Person Responsible	Date Due
1	Assess viability of providing accounting services for smaller parishes and Deanery schools.	Patricia Murtha	July 1, 2011
2	Evaluate current functions of Finance Office staff members to realign responsibilities.	Patricia Murtha	July 1, 2011
3	Establish procedures for the processing of individual parishes and Deanery Schools financial activities.	Entire Staff	July 1, 2011
4	Determine effectiveness of new procedures for shared services through communications with the affected Pastors and Principals.	Entire Staff	Oct 1, 2011 Jan 1, 2012 Apr 1, 2012

Goal 2: Evaluate, enhance and support the role of Parish Business Managers.

	Objective	Person Responsible	Date Due
1	Evaluate the current job description and requirements for enhancement.	Patricia Murtha	July 1, 2011
2	Establish and implement a training seminar for individuals currently working as Parish Business Managers.	Patricia Murtha	Oct 1, 2011
3	Establish and implement a training seminar for individuals currently working as Business Managers in a parish with a school.	Patricia Murtha	Nov 1, 2011
4	Update the Parish Policy Manual to reflect the role of the Business Manager.	Patricia Murtha	Jan 1, 2012
5	Conduct annual visits to selected parishes in an effort to assist Business Managers in their role.	Thomas Toolan Patty Murtha	Throughout the year

Goal 3: Evaluate and enhance the internal control structure related to financial transactions at the Diocesan level.

	Objective	Person Responsible	Date Due
1	Evaluate and enhance the controls over Cash Disbursements and document for distribution to Diocesan Offices.	Patricia Murtha Diane Gamache	Apr 1, 2011
2	Evaluate and enhance the controls over Cash Receipts and document for distribution to Diocesan Offices.	Patricia Murtha Lucia Jaramillo	May 1, 2011
3	Evaluate and enhance the controls over Payroll activities and document for distribution to Diocesan Offices.	Patricia Murtha Kevin Tran	June 1, 2011
4	Evaluate and enhance the controls over Data Processing activities and document for distribution to Diocesan Offices.	Patricia Murtha Monica DeMatteo La-Tanya Gadson	July 1, 2011

Goal 4: Evaluate and enhance the internal control structure related to financial transactions at the parish and school level.

	Objective	Person Responsible	Date Due
1	Coordinate activities with the Internal Audit Staff to identify control weaknesses.	Entire Staff	Throughout the year.
2	Update current Fiscal Management procedures in the Parish Policy Manual.	Entire Staff	Throughout the year.
3	Develop new procedures to be included in the Parish Administration Policy Manual.	Entire Staff	Throughout the year.
4	Conduct annual visits to selected parishes in an effort to identify areas that require emphasis or improvement.	Thomas Toolan Patricia Murtha	Throughout the year.

Goal 5: Evaluate and enhance the structure and use of Finance Councils at the parish level.

	Objective	Person Responsible	Date Due
1	Develop and distribute requirements for Parish Finance Councils to Pastors and Administrators.	Patricia Murtha	July 1, 2011
2	Conduct annual visits to selected parishes in an effort to identify areas that require emphasis or improvement.	Thomas Toolan Patricia Murtha	Throughout the year.
3	Enhance the Parish Administration Policy Manual to incorporate the need for and benefit of Finance Councils.	Patricia Murtha	July 1, 2011

Goal 6: Coordinate the financial service activities for the Diocese.

	Objective	Person Responsible	Date Due
1	Conduct the daily financial activities of the Diocese.	Entire Staff	Throughout the year.
2	Develop an Annual Operating and Capital Budget	Thomas Toolan Patricia Murtha	7/1/2011
3	Coordinate the annual external Audits for the Diocese and Crematory.	Entire Staff	9/1/2011
4	Manage, reconcile and record the Diocesan Parish & Loan Fund activities.	Patricia Murtha	Throughout the year
5	Reconcile and record the Diocesan Investment Portfolio activities.	Patricia Murtha	Throughout the year.
6	Prepare and review monthly asset and liability reconciliations.	Entire Staff	Throughout the year.
7	Coordinate banking needs for the Diocesan offices, parishes and schools.	Thomas Toolan Patricia Murtha	Throughout the year.
8	Reconcile and record EDA Loan activity	Patricia Murtha	Throughout the year.
9	Reconcile and record health benefits' billings and revenue.	Patricia Murtha Lucia Jaramillo	Throughout the year.
10	Coordinate and record the data processing and financial transactions for the Bishop's Annual Appeal.	Entire Staff	Throughout the year.
11	Manage, record and reconcile bi-weekly payroll for Diocesan employees.	Kevin Tran Patricia Murtha	Throughout the year.

Goal 7: Coordinate activities with the Diocesan Council for Financial Affairs and its subcommittees to assist the Bishop with Diocesan operations.

	Objective	Person Responsible	Date Due
1	Convene Quarterly Council for Financial Affairs meetings and provide a Budget and subcommittee updates	Thomas Toolan	Throughout the year.
2	Schedule and/or attend meetings with the Investment, Audit, Insurance and Pension subcommittees.	Thomas Toolan Patricia Murtha	Throughout the year
3	Actively work with the Salary review Board and Vicar General during the Budget process to generate a surplus budget and present to the Council for Financial Affairs.	Thomas Toolan Patricia Murtha	June 1, 2011
4	Assist the Schools' Office, schools and parishes to review budgets and annual operations, such as deanery school consolidations, <i>Renewing the Church in South Edison-Highland Park</i> process and parishes in financial trouble.	Thomas Toolan Patricia Murtha	Throughout the year



DIOCESE OF METUCHEN DEPARTMENTAL PASTORAL PLANS

Office

Office of Human Resources

Mission Statement

The Office of Human Resources works in partnership and collaboration with clergy and lay staff throughout the diocese to provide personnel support and guidance, recommend and administer comprehensive benefit programs, and advocate work environments that respect the dignity of work, as well as the rights and responsibilities of each.

Vision Statement

The Office of Human Resources fosters and encourages work environments that make the Diocese of Metuchen, its parishes and schools a model employer. We serve clergy and lay employees throughout the diocese by providing effective leadership, professional expertise and quality consultation that respects organizational and individual rights under canon and civil law.

Three-Year Goals

- 1** Develop and implement an employee handbook at each parish that complies with state and federal employment laws and diocesan policies, which incorporates respective parish policies. Ensure that the handbook is properly distributed to staff and that it serves to establish formal guidelines for administering personnel matters (Synod Norm 10).
- 2** Develop, administer and consistently monitor programs that support/increase employee morale.
- 3** Develop, implement and administer qualified priest retirement program.
- 4** Develop, administer and offer professional development and ongoing education opportunities to employees.
- 5** Full roll-out and use of Success Factors at the Pastoral Center & pilot locations.
- 6** Develop, institute and manage a formal compensation system for Pastoral Center staff.
- 7** In conjunction with the Internal Audit Office, develop, implement and oversee a comprehensive HR Audit program for parishes and schools.
- 8** Identify and explore opportunities that more actively engage the Office of Human Resources in Church ministry and outreach programs.
- 9** Ensure the ongoing, efficient administration of the Office of Human Resources by undertaking various programs, projects and initiatives.

*** Note: The highlighted Goals & Objectives support the Diocesan effort to “Embrace Unity in our Diversity”.**

One Year Objectives

Goal 1: Develop and implement an employee handbook at each parish that complies with state and federal employment laws and diocesan policies, which incorporates respective parish policies. Ensure that the handbook is properly distributed to staff and that it serves to establish formal guidelines for administering personnel matters (Synod Norm 10).

Objective	Person Responsible	Date Due
1 Continue to develop and implement employee handbooks at the approximately 35 remaining; ensure that the handbook is properly distributed to staff and that it serves to establish formal guidelines for administering personnel matters. (Synod Norm 10).	Eric Dill Melissa Garcia	June 30, 2012

Goal 2: Develop, administer and consistently monitor programs that support/increase employee morale.

Objective	Person Responsible	Date Due
1 Identify at least 2 significant initiatives or events that are targeted towards increasing employee morale among staff at the Pastoral Center.	Melissa Garcia Kathleen Campbell	June 30, 2012

Goal 3: Develop, implement and administer qualified priest retirement program.

Objective	Person Responsible	Date Due
1 Introduce program to diocesan priests and provide ongoing education and resources on retirement planning.	Eric Dill	Aug 31, 2011
2 Coordinate the pension billing and trust funding as directed by the Priest Pension Committee.	Eric Dill	Aug 31, 2011

Goal 4: Develop, administer and offer professional development and ongoing education opportunities to employees.

	Objective	Person Responsible	Date Due
1	Identify 4-6 staff members for initial enrollment in the Organizational Leadership program offered through Villanova University; Coordinate enrollment and track participation/completion; assess the ROI and report to Senior Management.	Eric Dill	June 30, 2012

Goal 5: Full roll-out and use of Success Factors at the Pastoral Center & pilot locations.

	Objective	Person Responsible	Date Due
1	Ongoing roll-out and use of Success Factors at the Pastoral Center & pilot locations; facilitate and support departmental goals and objectives by fully implementing and achieving a 95% user rate on the Success Factors performance management system at the pastoral center.	Eric Dill Melissa Garcia	June 30, 2012
2	Continue to work with the Schools Office to monitor user rates and effectiveness at pilot schools.	Eric Dill Melissa Garcia	June 30, 2012

Goal 6: Develop, institute and manage a formal compensation system for Pastoral Center staff.

	Objective	Person Responsible	Date Due
1	Present proposed system to the Salary Review Board for consideration; implement approved program.	E. Dill	Dec 31, 2011

Goal 7: In conjunction with the Internal Audit Office, develop, implement and oversee a comprehensive HR Audit program for parishes and schools.

	Objective	Person Responsible	Date Due
1	Assist parishes and schools with administrative programs by conducting a minimum of 12 HR audits; and follow up on recommendations to pastors.	Eric Dill Melissa Garcia	June 30, 2012
2	Prepare report on findings.	Eric Dill Melissa Garcia	June 30, 2012
3	Follow up on recommendations to pastors.	Eric Dill Melissa Garcia	June 30, 2012

Goal 8: Identify and explore opportunities that more actively engage the Office of Human Resources in Church ministry and outreach programs.

	Objective	Person Responsible	Date Due
1	Develop a more pronounced link between the HR Office and pastoral ministries by identifying and participating in 6 or more activities or parish/pastoral center ministry events.	Eric Dill Kathleen Campbell Melissa Garcia	June 30, 2012

Goal 9: Ensure the ongoing, efficient administration of the Office of Human Resources by undertaking various programs, projects and initiatives.

	Objective	Person Responsible	Date Due
1	Review and update the pastoral center handbook, primarily to account for employment law changes resulting from the Patient Protection and Affordable Care Act (PPACA); review current edition of the employee handbook; consult with legal counsel; recommend appropriate editorial and policy changes to the Bishop; implement approved changes.	Eric Dill Melissa Garcia	Dec 31, 2011
2	Review new government mandates; ensure that appropriate plan design changes are implemented; monitor compliance with reporting provisions of the PPACA.	Eric Dill Melissa Garcia	June 30, 2012

3	Undertake a comprehensive review of insurance programs throughout the annual renewal process; recommend appropriate strategies/changes to the Insurance Committee; implement approved recommendations; coordinate open enrollment process.	Eric Dill Kathleen Campbell Melissa Garcia	July 31, 2011
4	Develop and initiate a FMLA/NJLA webinar training program that incorporates recent changes in family leave laws; coordinate, schedule and conduct a comprehensive training program utilizing web based training.	Eric Dill	June 30, 2012
5	Formally train benefit coordinators so that they're able to control census/enrollment data entry locally.	Kathleen Campbell	June 30, 2012



DMIOCESE OF METUCHEN DEPARTMENTAL PASTORAL PLANS

Office

Office of Information Systems

Mission Statement

The objective of the Office of Information Systems is the management, development, implementation, support and guidance of technology based systems for the purpose of creating an environment whose facilities and services enable the accomplishment of our ministries, schools and parishes of the Diocese in implementing their mission.

Vision Statement

The Office of Information Systems supports all ministries, schools and parishes' technologies to foster an environment which enables the Diocese, as a whole, to deliver its mission.

Three-Year Goals

- 1 Enhance the technology infrastructure to the current needs of the schools, parishes and ministries.
- 2 Integrate new technology solutions which will improve all organizational functions within the entire Diocese.
- 3 Provide guidance and implement the education of technology across Diocesan ministries.

* Note: The highlighted Goals & Objectives support the Diocesan effort to Strengthen "Embrace Unity in our Diversity".

One Year Objectives

Goal 1: Enhance the technology infrastructure to the current needs of the schools, parishes and ministries.

	Objective	Person Responsible	Date Due
1	Upgrade/out-source unsupported server operating systems.	David Torres	Ongoing
2	Upgrade Diocesan-wide electronic communication systems to support mobile and external access to information.	David Torres	Sep 1, 2011
3	Continue to deploy and synchronize parish census Diocesan database for parishes.	Hetal	Ongoing
4	Support Office of Schools deployment of electronic gradebook for schools.	Leo Cortelezzi Hetal Patel	Ongoing
5	Enhance content filtering features to provide greater security protection from multimedia and social networking sites.	David Torres	July 31, 2011
6	Implement supported telephone and voicemail systems.	Leo Cortelezzi	Dec 1, 2011

Goal 2: Integrate new technology solutions which will improve all organizational functions within the entire Diocese.

	Objective	Person Responsible	Date Due
1	Deploy secure and remote access of documents and applications to Diocesan members.	David Torres	June 30, 2012
2	Deploy extranet module to assist in communications between Diocesan ministries, parishes and schools.	Leo Cortelezzi David Torres	June 30, 2012
3	Implement e-commerce feature to provide the capability of electronic credit card payments.	All	June 30, 2012
4	Research, acquire & implement diocesan website.	All	Dec 31, 2011
5	Maintain remote conferencing tools for Diocesan events.	All	Ongoing

Goal 3: Provide guidance and implement the education of technology across Diocesan ministries.

Objective	Person Responsible	Date Due
1 Provide training sessions for the following Diocesan-wide applications:		
2 ParishSoft (all modules) – Estimate: 6 sessions.	Hetal Patel	June 30, 2012
3 IT Office knowledge forums – Estimate: 4 sessions.	All	June 30, 2012
4 Ms Office Suite 2007 – Estimate: 6 sessions.	Hetal Patel Lydia D'Souza	June 30, 2012
5 Remote Access to Diocesan Events – Estimate: 8 sessions.	Lydia D'Souza	June 30, 2012
6 Employee orientation - Estimate: 8 Sessions.	Lydia D'Souza Hetal Patel	June 30, 2012
7 New Equipment Orientation (Copiers, Printers, Telephones, Voice Mail, Cell Phones & others) – Estimate: 8 sessions.	All	June 30, 2012
8 In collaboration with the office of Schools: Powerschool – Estimate: 2 sessions.	Hetal Patel	June 30, 2012
9 In collaboration with the office of Communications: Diocesan Website, Extranet, E-commerce - Estimate: 10 Sessions.	Leo Cortelezzi David Torres	June 30, 2012
10 In collaboration with the Department of Planning: MissionInsite - Estimate: 1 Sessions.	Hetal Patel	June 30, 2012
11 In collaboration with the office of Personnel: Honeywell –Estimate: 2 sessions.	Hetal Patel Terry DeGuzman	June 30, 2012
12 Conduct technology assessments for Parish/Schools to review organization technology infrastructure: – Estimate: 3 reports.	Leo Cortelezzi David Torres	June 30, 2012
13 In collaboration with the office of Internal Audit: Create Electronic diocesan data retention policy.	Leo Cortelezzi David Torres	June 30, 2012



DIocese OF METUCHEN DEPARTMENTAL PASTORAL PLANS

Office

Office of Insurance

Mission Statement

The Office of Insurance serves all areas of the Diocese in the offering of insurance guidance, not only at the time of claim, but also in the management of potential risk to avoid claims.

Vision Statement

Through the broad level of interaction and communication between the insurance department and all levels of the diocese, diocesan interests related to insurance are better served and protected against exposure to insurance risk.

Three-Year Goals

- 1 Visit all parishes and/or schools with Facility Manager and Third Party Administrator Safety Engineer to observe facilities and offer assistance related to managing Risk.
- 2 Establish a good level of communication between all Diocese of Metuchen Entities (parishes/schools/cemeteries/Catholic Charities) and the Office of Insurance.
- 3 Document the Diocese of Metuchen claim process for the Third Party Administrator.

** Note: The highlighted Goals & Objectives support the Diocesan effort to “Embrace Unity in our Diversity”.*

One Year Objectives

Goal 1: Visit all parishes and/or schools with Facility Manager and Third Party Administrator Safety Engineer to observe facilities and offer assistance related to managing Risk.

	Objective	Person Responsible	Date Due
1	Visit 25 parishes and/or schools a year to do an Insurance Risk assessment.	Jacqueline Glackin	June 30, 2012
2	Work with Facilities Manager and TPA Risk Manager to obtain information and make recommendations to improve risk to avoid property and liability claims. In an effort to take the “next step” in Risk Management, the Office of Insurance will formally notify the parishes and/or schools in writing the ramifications of failure to take the recommended actions.	Jacqueline Glackin	June 30, 2012
3	Where needed, offer assistance through the Matching Grant Program (50% to a limit of \$25,000).	Jacqueline Glackin	June 30, 2012
4	Meet with parish and/or school within three months to follow up on areas which were noted as areas in need of attention.	Jacqueline Glackin	June 30, 2012
5	Ensure a positive claim experience for all by contacting parish and/or school official to explain the claim process and work hand-in-hand with the Diocese of Metuchen Entity and TPA Risk Manager from beginning of claim through conclusion. The Office of Insurance will follow-up with the Diocese of Metuchen Entity official within 5 business days of claim for feedback on the process.	Jacqueline Glackin	June 30, 2012

Goal 2: Establish a good level of communication between all Diocese of Metuchen Entities (parishes/schools/cemeteries/Catholic Charities) and the Office of Insurance.

	Objective	Person Responsible	Date Due
1	Develop a quarterly newsletter to inform and educate Diocese of Metuchen Entities on managing and avoiding Risk.	Jacqueline Glackin	June 30, 2012
2	Offer a Seminar twice a year to instruct various changes in the arena of Safety Controls. Topics will be centered on the most frequent claims.	Jacqueline Glackin	June 30, 2012

3	Offer personalized safety instructions to Diocese of Metuchen Entities, as requested, to respond to the exposures which develop through out the year.	Jacqueline Glackin	June 30, 2012
4	Develop a customized “what to do and what not to do” plan for each Diocese of Metuchen Entity at the time of the claim, such as “Never discuss coverage aspect of claim with the public”.	Jacqueline Glackin	June 30, 2012
5	At the conclusion of each claim, the Office of Insurance will interview the Diocese of Metuchen Entity official to ensure all insurance expectations have been met.	Jacqueline Glackin	June 30, 2012

Goal 3: Document the Diocese of Metuchen claim process for the Third Party Administrator.

	Objective	Person Responsible	Date Due
1	Develop written guidelines for the TPA Risk Manager to follow on all Diocese of Metuchen Insurance claims.	Jacqueline Glackin	Dec 31, 2011



DIOCESE OF METUCHEN DEPARTMENTAL PASTORAL PLANS

Office

Office of Property & Facilities Management

Mission Statement

Property & Facilities Management assists and serves the Bishop of Metuchen and the parishes, schools, ministries and community needs in all four counties by providing assistance in all aspects of property development and maintenance along with coordinating special events within the Diocesan Center.

Vision Statement

Property & Facilities Management maintains open lines of communication with all schools, parishes and diocesan offices working to assist planning events and programs at the Diocesan Center. We develop relationships with all priests within the diocese for smooth transitions into parishes along with assisting them with consultation, on all renovations, construction and maintenance issues.

Three-Year Goals

- 1 Promote the use of the conference/catering facility by parishes, schools and parishioners to a total of 20 events.**
- 2 Replace boilers at Diocesan Center and install security cameras.**
- 3 Create procedure manuals for maintenance tasks.**
- 4 Develop and run maintenance seminars for parishes and schools in the Diocese with Diocesan Insurance Office.**
- 5 Assist Diocesan Insurance Office in review of facilities and addressing facility issues.**
- 6 Educate and engage parishes by working with the College of Consultors on major projects with our Construction Consultant.**
- 7 Replacement/repairs of various levels at Diocesan locations.**
- 8 Create a light fixture and bulb spread sheet to monitor usage and repair.**
- 9 Create a spread sheet to monitor and track restroom fixtures and plumbing repair.**
- 10 Continue to educate and engage parishes with consultation, construction and renovation jobs to more parishes will rely on the Diocese for help with their projects (including Diocesan Staff).**

*** Note: The highlighted Goals & Objectives support the Diocesan effort to “Embrace Unity in our Diversity”.**

One Year Objectives

Goal 1: Promote the use of the conference/catering facility by parishes, schools and parishioners to a total of 20 events.

	Objective	Person Responsible	Date Due
1	Continue to advertise with our new ad and logo in parish bulletins, bridal magazines, Val-Pak and send flyers home with Religious Education Catholic School students. We will evaluate outcome 8/11.	Jamie Bowen	Ongoing
2	Upgrade to better quality china & silverware if major events increase.	Jamie Bowen	Dec 30, 2011
3	Purchase art for back entrance walls.	Jamie Bowen	Dec 30, 2011
4	Purchase chair covers for dining room chairs for weddings and special events if requested by clients.	Jamie Bowen	Dec 30, 2011
5	Continue to upgrade website for catering/events.	Jamie Bowen	Aug 1, 2011
6	Advertise with Google AdWords.	Jamie Bowen	Aug 31, 2011

Goal 2: Replace boilers at Diocesan Center and install security cameras.

	Objective	Person Responsible	Date Due
1	In process of obtaining pricing on replacements of boilers.	Steve Guralchuk	July 31, 2011
2	Obtaining quotes on security cameras for the safety of the staff and visitors to the Diocesan Center.	Monica Demkovitz	July 31, 2011
3	Select bids, implement changes. (There maybe a Grant to help with the security cameras. Waiting for info on when we can apply.)	Monica Demkovitz	July 31, 2011

Goal 3: Create procedure manuals for maintenance tasks.

	Objective	Person Responsible	Date Due
1	Create maintenance manual for various tasks at parishes and schools.	Steve Guralchuk	Dec 30, 2011
2	Work with maintenance staff at 20 parishes on automatic faucets, flush toilets, RTU filters and belts, man lift and carriage setup and HVAC computer logon and use.	Steve Guralchuk	Dec 30, 2011

Goal 4: Develop and run maintenance seminars for parishes and schools in the Diocese with Diocesan Insurance Office.

	Objective	Person Responsible	Date Due
1	Continue to work with another 30 parishes to implement a successful electric program at their sites to help save money with bills.	Monica Demkovitz	Ongoing
2	Distribute OSHA Safety Handbooks to Pastors along with maintenance information sheet from the Diocese.	Monica Demkovitz Steve Guralchuk	Ongoing

Goal 5: Assist Diocesan Insurance Office in review of facilities and addressing facility issues.

	Objective	Person Responsible	Date Due
1	Review parish's rectories and parish sites for risk related issues.	Monica Demkovitz	Ongoing
2	Assist parishes in the fix of any issues that need to be addressed.	Joe Provenzale	Ongoing
3	Assist Insurance Office for the financial benefit of the parish community by developing scope of work that needs to be performed with insurance claims.	Joe Provenzale	Ongoing
4	Organize 27 insurance inspections at parishes.	Monica Demkovitz	Ongoing

Goal 6: Educate and engage parishes by working with the College of Consultors on major projects with our Construction Consultant.

	Objective	Person Responsible	Date Due
1	Assist Pastors in maintaining policies and procedures as outlined by the College of Consultors for major projects in excess of \$35,000 as directed by the College.	Joe Provenzale	Ongoing
2	Assist College of Consultors and Pastors to implement approved projects.	Joe Provenzale	Ongoing
3	As directed, prepare cost estimates as a guideline for major projects of the Diocese and parishes and manage project to completion.	Joe Provenzale	Ongoing
4	Available for all crisis management at parishes and Diocese.	Joe Provenzale	Ongoing
5	Be available to Pastors so no problems arise between architect, engineer or contractors.	Joe Provenzale	Ongoing
6	Work with Catholic Charities Construction Team to address needs identified by Pastors or on insurance inspections.	Joe Provenzale	Ongoing

Goal 7: Replacement/repairs of various levels at Diocesan locations.

	Objective	Person Responsible	Date Due
1	Obtain pricing for new roof and new furnace at 137 Metlars Lane (convent).	Steve Guralchuk	Aug 31, 2011
2	Parking lot line striping and black top repair at Diocesan Center and Maria Regina.	Steve Guralchuk Jim DeLuca Harry Aszman	Aug 31, 2011
3	Create planting islands at the Diocesan Center on front lawn to street.	Steve Guralchuk Jim DeLuca Harry Aszman	Aug 31, 2011
4	Obtain estimates for new roof at Maria Regina	Steve Guralchuk	Aug 31, 2011
5	Reset pavers, replace back door and paint exterior trim at the Residence.	Steve Guralchuk Jim DeLuca Harry Aszman	Oct 31, 2011
6	Obtain pricing to replace domestic water pipes & waste pipes in all the suites at Bethany Ridge.	Steve Guralchuk	Aug 31, 2011

Goal 8: Create a light fixture and bulb spread sheet to monitor usage and repair.

	Objective	Person Responsible	Date Due
1	List all interior and exterior fixtures with lamp & ballast information.	Steve Guralchuk	Dec 30, 2011

Goal 9: Create a spread sheet to monitor and track restroom fixtures and plumbing repair.

	Objective	Person Responsible	Date Due
1	Create a sheet showing all restroom locations and all fixtures located within them, a monthly check off sheet and changes to the list.	Steve Guralchuk	Dec 30, 2011

Goal 10: Continue to educate and engage parishes with consultation, construction and renovation jobs to more parishes will rely on the Diocese for help with their projects (including Diocesan Staff).

	Objective	Person Responsible	Date Due
1	Keep Pastors informed about our consultation, construction and renovation services through newsletters during the year.	Monica Demkovitz	Quarterly
2	As requested meet with Pastors who have questions regarding construction/renovations.	Monica Demkovitz	Ongoing
3	Oversee all projects involved with events and catering on behalf of the Bishop.	Monica Demkovitz	Ongoing
4	Oversee all projects involved with repairs and replacements on behalf of the Bishop.	Monica Demkovitz	Ongoing
5	Oversee all projects involved with office staff projects on behalf of the Bishop.	Monica Demkovitz	Ongoing
6	Oversee all projects involved with Farmland Assessment on behalf of the Bishop.	Monica Demkovitz	Ongoing
7	Oversee all projects involved with Further Statements on behalf of the Bishop.	Monica Demkovitz	Ongoing
8	Oversee all projects involved with mailroom projects and upgrades on behalf of the Bishop.	Monica Demkovitz	Ongoing
9	Oversee all projects involved with fire and security systems on behalf of the Bishop.	Monica Demkovitz	Ongoing

10	Oversee all projects involved with sound system on behalf of the Bishop.	Monica Demkovitz	Ongoing
11	Oversee all projects involved with pest control on behalf of the Bishop.	Monica Demkovitz	Ongoing
12	Oversee all projects involved with elevator issues on behalf of the Bishop.	Monica Demkovitz	Ongoing
13	Oversee all projects involved with offices supplies and furniture procurement on behalf of the Bishop.	Monica Demkovitz	Ongoing
14	Oversee all projects involved with blood drives on behalf of the Bishop.	Monica Demkovitz	Ongoing
15	Work on St. Peter's basement renovation, New Brunswick.	Monica Demkovitz	Dec 30, 2011
16	Work on St. Mary's High School, Perth Amboy renovation. ;	Monica Demkovitz	Dec 30, 2011
17	Work on Mary, Mother of God Church addition, Hillsborough.	Monica Demkovitz	Dec 30, 2011
18	Work on St. Stephen's School, Perth Amboy, scaffolding and exterior brick repair.	Monica Demkovitz	Dec 30, 2011
19	Work on property sale in Clinton Township for \$450,000.	Monica Demkovitz	Dec 30, 2011
20	Work on sale of Emmaus House, Perth Amboy.	Monica Demkovitz	Dec 30, 2011
21	Negotiate renewal leases for Our Lady of Hungry School, Perth Amboy.	Monica Demkovitz	Dec 30, 2011
22	Negotiate renewal leases for St. Frances Cabrini, Piscataway.	Monica Demkovitz	Dec 30, 2011