

SAN ANTONIO DE PADUA DEL CAÑON CHURCH



POLICIES AND PROCEDURES MANUAL FOR MINISTRIES / ORGANIZATIONS

SAN ANTONIO DE PADUA CHURCH

Office of the Pastor
5800 E. Santa Ana Canyon Road
Anaheim Hills, CA 92807
(714.974.1416)

February 26, 2013

Dear Heads of Ministries / Organizations,

I am happy to present to you an updated Policies and Procedures Manual for San Antonio's Ministries/Organizations. The original Policies and Procedures Manual was distributed in October 2010.

In presenting this manual to you I am reminded of our Parish Mission Statement:

"We the people of San Antonio parish strive to be a community of faith, hope and love. We find our identity and mission in Jesus Christ and His Gospel. We celebrate our life as Catholic Christians in word, worship and service. By recognizing our baptism, we accept our call to personal renewal and reach out with the gospel message to families and individuals, extending an invitation to fellowship with us."

As stated in Canon Law, "The PASTOR is the proper shepherd of the parish to which he is assigned, exercising Pastoral care in the community entrusted to him under the authority of the diocesan bishop, in whose ministry of Christ he has been called to share; in accord with the norm of law, he carries out for his community the duties of teaching, sanctifying and governing, with the cooperation of other presbyters and deacons and the assistance of lay members of the Christian faithful" (canon 519).

Consequently, as Pastor it is my responsibility to the parishioners of San Antonio de Padua Church and to the Bishop of the Diocese of Orange, "to administer the receipt and disbursement of parish funds in a legal and prudent manner. All receipts of funds for Church related activities are to be recorded in the parish books with funds being disbursed for valid expenditures incurred as part of these activities. It is my responsibility to safeguard all monies received, conserve the assets of the parish, and expend funds within parish means. These activities are to be conducted in a manner that establishes accountability for financial activities."

In my responsibility to ensure that the parish establishes good business practices, compliance with the matters discussed in this manual can significantly reduce parish and diocesan exposure to liability.

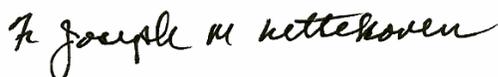
This manual is designed to "promote and protect sound management practices for both financial and facility management". It was prepared in order that we meet all federal and state law requirements (to keep our **non-profit status** from being put in jeopardy), and to comply with Diocesan recommendations and mandates.

You may also find the forms contained in the manual on our website at www.sanantoniochurch.org or you may contact Sue Kirrer, Parish Business Manager for the forms to be emailed to you.

Should you have any questions please contact me or Sue Kirrer.

Thank you for your support and cooperation as well as what you have done and continue to do for San Antonio Parish. You are greatly appreciated.

Sincerely In Christ,



Reverend Joseph M. Nettekoven
Pastor

INTRODUCTION

Thank you for your involvement in the faith life of San Antonio de Padua Parish. As much as we would like to be free to minister to all who come to us, we do live in a society regulated by rules.

This updated “Policies and Procedures Manual For Ministries/Organizations” describes parish and financial procedures to account for parish operations. It fulfills current diocesan mandates as well as state and federal law. This manual contains all forms and procedures you will need for any event you may propose and may be refined from time to time as need be.

When a ministry or organization wishes to have an event either off site or at the parish facility this manual explains the procedures that need to be followed in order that we meet the above criteria.

The following is a brief outline of procedures to be used for an event planned by a parish ministry/organization:

- Event form needs to be completed and submitted to the Pastor for his approval.
- Once approved and the event is to take place at the parish a “Facility Form” needs to be completed and submitted to the Parish Office in order for the event to be put onto the parish calendar.
- If an outside vendor is to be used at an event the Vendor portion on the Event Form must be completed. All vendors who come onto parish property must be approved through Compliance Depot.
- If a speaker is requested at the event a Speaker Form will need to be completed and submitted to the Pastor for his approval.
- All revenue from an event is to be entered on a Cash Receipt Log and submitted to the Parish Business Office in a sealed tamper proof bag as soon as the money is collected. All monies are to be intact and no monies are to be withheld to pay any expenses.
- All expenses are to be paid through the Parish Business Office.
- If items need to be purchased for an event, a Purchase Request Form must be completed and submitted to the Business Office prior to the event taking place.
- If reimbursements need to be made for out of pocket expense for an event, a Check Request Form is to be completed with **original receipts** attached and submitted to the Parish Business Office.

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HANDLING MONEY POLICY

It is the policy of San Antonio de Padua Church, as mandated by the Diocese of Orange, that all cash and checks collected are to be included and submitted for deposit. All monies are to be placed in a tamper proof bag provided by the Parish Business Manager, sealed and turned into the Parish Business Manager during Parish Office hours immediately after receipt. It is diocesan policy and best business practice that **no money, either cash or check, is to be taken home to be counted.** The parish facility is used to count money and all monies collected are to be counted by the Parish Money Counters. **THERE ARE NO EXCEPTIONS.** Under no circumstances are funds to be disbursed directly from the revenue i.e. to pay a speaker, musician, or any other expense. All expenses are to be paid through the Parish via a check request.

COLLECTIONS AT AN EVENT

NO collection at any event is to be taken up without prior approval from the Pastor. If approved, the collection is **NOT** to be given directly to the organization at the event. The money collected is to be placed in a tamper proof bag provided by the Parish Business Manager, sealed and given to the Parish Business Manager to be placed in the safe for the money counters to count. The Parish Business Manager will notify you of the amount collected.

Once notified, you are to complete a Check Request Form for the money to be sent to the organization that is to receive the funds. No money collected at an event will be paid to an individual. **NO EXCEPTIONS!** All stipends for an individual who is to be paid for an event (speakers/musician) **MUST** be processed through payroll. The individual who is to be paid **MUST** see the Parish Business Manager prior to the event to complete the necessary paperwork in order to be paid.

SALES AFTER MASS OR AT AN EVENT

All sales to take place after Mass or at an event **MUST** be approved by the Pastor prior to the sale. **NO EXCEPTIONS!**

At the end of the sale for **each** Mass/Event the cash and checks are to be placed into the tamper proof bag provided by the Parish Business Manager for the Mass/Event. Remove the paper strip from the adhesive area, **place the strip in the bag**, fold flap down (**do not cover the number on the tamper proof bag**) and seal the **tamper proof plastic bag**.

If a sale took place after Mass, the bag will be picked up by 2 Hospitality Ministers and put into the safe to be counted on Monday and deposited. If the sale took place at an event outside of Mass, the sealed tamper proof bag is to be dropped in the mail slot at the Parish Office. The Parish Business Manager will notify you of the amount collected and your income account will be credited.

CASH AND CHECK RECEIPT LOG PROCEDURE FOR DONATIONS, DUES, EVENTS, ETC.

A Cash & Check Receipt Log is to be used for all cash and checks that are received for an organization via in person or mail for a donation, dues, event, sales, etc.

ALL checks and cash received for an organization are to be entered on this log. (sample attached)

ALL persons are to be given a receipt from the Cash Receipt Book for money given by cash to the organization.

ALL cash is to be entered in the cash receipt book, with the original copy given to the payee - **NO EXCEPTIONS!** The first copy is to be paper clipped to the cash and the cash receipt number is to be entered on the Cash & Check Receipt Log. The last copy is to remain in the receipt book.

The following information is to be entered on the log:

- date money was received
 - source (mail or in person)
 - payee
 - amount of cash or check
 - cash receipt number if it is cash
 - check number
 - purpose of payment (i.e. donation, dues, event (name of event), for a purchase)
 - your initials
1. Run an adding machine tape on the amounts entered on the log and enter this total on the first page of the form.
 2. Enter the dollar amount for each item under the Recap section and total. The total on the front of the log and the total under Recap **MUST** agree.
 3. Reconcile cash, coin, and checks. Enter the quantity and value for each denomination under Reconciliation of Deposit. (sample attached) Enter amount of coin. Run an adding machine tape on all checks received and enter amount of checks.
 4. The total amounts on the form and the total amount of cash and checks **MUST** agree.
 5. Enter the tamper proof bag number in the space provided.
 6. Enter your name in the Prepared By space.
 7. Enter the date you sent the form, cash, and checks to the Parish Business Manager for deposit.

8. Retain a copy of the form for your files.
9. Place the Cash and Receipt log along with the cash and checks into the tamper proof bag. Remove the paper strip from the adhesive area, **place the strip in the bag**, fold flap down (**do not cover the number on the tamper proof bag**) and seal the **tamper proof plastic bag**.
10. Sign the Tamper Proof Bag Log.
11. Turn in the sealed tamper proof bag as well as the signed Tamper Proof Bag Log to the Parish Business Manager for deposit.

CASH AND CHECK RECEIPT LOG
ORGANIZATION _____

RECAP

| | |
|---------------------|-------|
| Donation | _____ |
| Dues | _____ |
| Event: _____ | _____ |
| Other: _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| Total | ===== |

RECONCILIATION OF DEPOSIT

| <u>DENOMINATION</u> | <u>QUANTITY</u> | <u>VALUE (\$)</u> |
|---------------------------------------|-----------------|-------------------|
| 1'S | _____ | _____ |
| 2'S | _____ | _____ |
| 5'S | _____ | _____ |
| 10'S | _____ | _____ |
| 20'S | _____ | _____ |
| 50'S | _____ | _____ |
| 100'S | _____ | _____ |
| TOTAL CURRENCY | _____ | _____ |
| COINS | _____ | _____ |
| CHECKS | _____ | _____ |
| Total Deposit | _____ | ===== |
| Prepared by | _____ | |
| Tamper Proof Bag Number | _____ | |
| Date Given To Business Manager | _____ | |

**CASH AND CHECK RECEIPT LOG
SAMPLE**

RECAP

| | | |
|---------------------|--|---------------|
| Donation | | 30.00 |
| Dues | | 125.00 |
| Event: _____ | | 150.00 |
| Other: _____ | | _____ |
| _____ | | _____ |
| _____ | | _____ |
| Total | | <u>305.00</u> |

RECONCILIATION OF DEPOSIT

| DENOMINATION | QUANTITY | VALUE (\$) |
|-----------------------|----------|---------------|
| 1'S | | |
| 2'S | | |
| 5'S | 3 | 15.00 |
| 10'S | 4 | 40.00 |
| 20'S | 5 | 100.00 |
| 50'S | | |
| 100'S | | |
| TOTAL CURRENCY | | 155.00 |
| COINS | | |
| CHECKS | | 150.00 |
| Total Deposit | | <u>305.00</u> |

Prepared by _____

Tamper Proof Bag Number _____

Date Given To Business Manager _____

CHECK REQUEST PROCEDURE FOR OUT OF POCKET EXPENSE/REIMBURSEMENT

OUT OF POCKET/REIMBURSEMENT and OTHER NON INVOICED ITEMS

Should an organization have a need for out of pocket expense, reimbursement will be made via a parish check payable to the designated person who made the purchase. The following steps are to be taken:

1. A Purchase Request Form is to be completed by the Chairperson or his/her designated person for all items to be purchased.
2. The completed form is to be submitted to the Parish Business Manager for review of any legal issues.
3. Once reviewed a copy of the Purchase Request Form will be returned and the items may then be purchased.
4. All reimbursement requests are to be submitted to the Parish Business Manager on a Check Request Form.
5. All **original receipts MUST** be attached to the Check Request Form for auditing purposes.
6. If there is no original receipt attached to the Check Request form, a reimbursement cannot be made.
7. All check requests for reimbursements **MUST** be submitted to the Parish Business Manager **no later** than the tenth day of the following month in which the expenses occurred. i.e., all May expenses to be submitted no later than June 10.
8. Check requests are to be submitted for payment to the Parish Business Office by Tuesday noon for the check to be mailed/picked up the same week.

SPEAKERS/MUSICIANS

1. Speaker Form is to be completed in full including the speaker's/musician's contact information and submitted to the Pastor for approval. (Speaker Policy and Form)
2. All stipends for an individual who is to be paid for an event (speakers/musician) **MUST** be processed through payroll. The individual who is to be paid **MUST** see the Parish Business Manager to complete the necessary paperwork prior to the event.

SAN ANTONIO DE PADUA CHECK REQUEST

PLEASE PRINT

Date: _____

Person Requesting Check: _____

Organization/Department: _____ Telephone Number: _____

PLEASE ISSUE A CHECK FOR THE FOLLOWING:

Payable To: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone Number: _____

Amount: _____

Reason: _____

Signature _____

Receipt Attached: Yes No **NOTE: Reimbursements MUST have original receipts attached.**

Invoice Attached: Yes: Invoice # _____ No

HANDLING (please check one)

Please mail Hold for pick up Return to me Other _____

Needed by (date/time): _____

FOR PURCHASES ONLY:

Pre-approved Purchase Request Attached: Yes No

Office Use Only

Vendor # _____

Acct # _____

Date Paid _____

Check # _____

PURCHASE REQUEST PROCEDURE

The following procedures are to be used when a purchase is to be made by an organization:

1. A Purchase Request Form is to be completed for all items to be purchased by the Chairperson or his/her designated person.
2. The completed form is then submitted to the Parish Business Manger for review of any legal issues.
3. Once reviewed a copy of the Purchase Request Form will be returned to the Chairperson or his/her designated person and the items may then be purchased.
4. To ensure that the invoice amount is taken to the proper organization's expense account, all invoices for items purchased are to read as follows:

San Antonio De Padua Church
(Name of Organization)
5800 East Santa Ana Canyon Road
Anaheim, CA 92807

5. The materials purchased are to be shipped to the parish office. **No purchase is to be shipped to an individual's home.**
6. Once the materials are received at the Parish Office they will be checked for accuracy of content and the Chairperson or his/her designated person will be notified for pick up.
7. The Chairperson or his/her designated person will initial and date the packing slip from the shipping carton and leave for the Parish Business Manager. The packing slip is needed to match to the invoice for payment.

SAN ANTONIO DE PADUA PURCHASE REQUEST FORM

Date: _____

Requested By: _____

Telephone Number: _____ Email Address: _____

Department/Organization: _____

Reason for Purchase: _____ Date Needed By: _____

Vendor Name: _____

Vendor Address: _____

City: _____ State: _____ Zip Code: _____

Telephone Number: _____ Fax Number: _____

Vendor Email Address: _____

| QUANTITY | | DESCRIPTION | | CATALOG NUMBER | | PRICE |
|----------|--|-------------|--|----------------|--|-------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |
| | | | | | | |

Office Use Only

Approved: Yes No

Signed _____

Date _____

TAMPERED PROOF BAG PROCEDURES

If collection of funds is to take place at an event during the week or on the weekend **after** all the Masses, tamper proof bags are to be used. All monies collected are to be put into a tamper proof bag(s) and sealed.

1. Notify the Parish Business Manager prior to the collection of funds. The Parish Business Manager will prepare the tamper proof bags and tamper proof bag log.
2. Organization is to assign a person to sign the tamper proof bag and control log. Please check the bag number, date, and time on the log against the number, date, and time on the bag to be sure they are the same.
3. The lead person(s) is to place the money collected into the **tamper proof bag**. **Two** persons are to be present at all times.
4. Remove the paper strip from the adhesive area, **place the strip in the bag**, fold flap down (**do not cover the number on the tamper proof bag**) and seal the **tamper proof bag**.
5. If the collection is taken during the week the tamper proof bag(s) are to be brought to the Parish Office by two (2) people.
6. If the collection is taken after all the Masses on the weekend the tamper proof bags are to be given to the Hospitality Ministers after each Mass to be placed in the safe.
7. Money will be counted by money counters and transported to the bank by armored car service.

THERE ARE TO BE TWO (2) AUTHORIZED UNRELATED PEOPLE INVOLVED AT ALL TIMES WHEN TRANSFERRING THE MONEY INTO THE TAMPER PROOF BAG AND TRANSFERRING IT TO THE SAFE AND SECURING IT.

BULLETIN ANNOUNCEMENTS GUIDELINES

BULLETIN DEADLINES

The bulletin deadline is the Friday nine days before publication on a Sunday. This enables us to prepare the bulletin early in the week and meet the printing deadline.

On occasion, there will be earlier deadlines due to vacations or holidays, check the bulletin for holiday notices. A schedule will be published quarterly and available to staff and parish ministries. Please contact the parish office if you wish to receive the schedule.

TYPES OF ARTICLES TO SUBMIT

Parish Events

Priority is given to parish events and information. We reserve the right to edit, omit or replace any text or picture due to quantity or quality. Please make sure you include the date you would like to have your article appear in the Sunday bulletin (include Sunday dates only, Saturday dates are not necessary).

Around Our Community Events

We are glad to publicize events outside of our parish, with approval of the pastor and if we feel that they will be of interest to our parishioners. We cannot guarantee publication, but will include them on a space available basis.

Share Your Talent

If you have pictures that you have taken at a parish event and wish to share them in the bulletin, you may also submit them for publication. These will be used when space allows and there is no guarantee when or if it will be published. Please include the name of the event, the date, the name of the person who took the photograph and any other details you wish to include.

ARTICLE GUIDELINES

1. **Transmitting:** Please submit copy digitally (email) in a text or Word format (pdfs are acceptable but not preferred), in the body of an email is acceptable.
2. **Fonts:** Times New Roman size 11 font will be used, regardless of your submission; fancy fonts are not available in most computers and are not transferrable.
3. **Size of ad:** Refrain from making your announcement a certain size by adding returns, boxes, centering, fancy fonts, etc. - the dimensions of your design may not be the size available and will need to be edited.

4. **Titles:** Capitalize only the first letter of every word. Refrain from using all capital letters.
5. **Body structure:** Capitalize only the first letter of the sentence. Refrain from using all capital letters or capitalizing the first letter of every word. Articles submitted in all caps will be rejected and will need to be resubmitted in regular form. Refrain from using two spaces between sentences, spaces instead of tabs, or spaces to center; what you see is NOT what I get, spaces take up extra characters and needs to be edited when copied onto a different size work space.
6. **Artwork or Pictures:** If there is artwork or photos to be included, please **attach** the jpeg or gif file to the email (pictures embedded into a word document, pdf or email **cannot** be used – if it does not show as an attached file on your email header, it **cannot** be used). Pictures need to be at least 300 dpi for a good quality print. Pictures that do not qualify will be substituted with a compatible picture or omitted all together.
7. **Dates:** Please make sure you include the date you would like to have your article appear in the Sunday bulletin (include Sunday dates only, Saturday dates are not necessary).

To submit any item to the bulletin, please email lmarmolejo@sanantoniochurch.org, which will ultimately be approved by the Pastor.

EVENT POLICY

All events **MUST** have the Pastor's approval prior to an event taking place. All venue agreements or contracts **MUST** be reviewed and signed by the Pastor. No one is permitted to enter into, make, or sign any agreements or contracts other than the Pastor.

Any organization/ministry who wishes to have an event either on church property or away from church property **MUST** have the pastor's approval prior to making a commitment and/or reserving a room for an event.

The **Head of the Organization/Ministry** must submit in writing to the pastor for approval the following:

1. Name of the event
2. Description of event
3. Place of event
4. Date and time of anticipated event
5. Number of anticipated attendees
6. Vendor who will be coming onto church property for an event
7. Any sale of items to take place

FUNDING

The **Head of the Organization/Ministry** must submit in writing to the pastor for approval the following:

1. How the event is proposed to be funded (i.e. fundraising, from organization/ministry funds, parish funds).
2. Proceeds from fundraisers, collections, donations, etc. are not to be used as direct payment for any event. All monies must be submitted to the Parish Business Manager and a parish check will be issued for the event. **No cash payments are permitted.**
3. Check requests are to be completed and submitted to the Parish Business Manager for a check to be issued to a vendor etc. for any event.

SALES

All sales to take place at an event **MUST** be approved by the Pastor. If approved, the money collected is to be placed in a tamper proof bag provided by the Parish Business Manager, sealed and given to the Parish Business Manager to be placed in the safe for the money counters to count. The Parish Business Manager will notify you of the amount collected. (see Sales Policy)

The **Head of the Organization/Ministry** must submit in writing to the pastor for approval the following:

1. Description of items to be sold
2. Cost of item to purchase

VENDORS

It is the policy of the Diocese of Orange that any vendor who performs any type of services on parish/school property, which includes bus transportation, must comply with diocesan insurance requirements and be screened through Compliance Depot. Compliance Depot is a company the Diocese of Orange has partnered with to handle the necessary documentation needed to meet insurance requirements as well as background checks. (see Vendor Policy).

The **Head of the Organization/Ministry** must submit in writing to the pastor for approval the following:

3. Name of Vendor
4. Address
5. City, State and Zip Code
6. Telephone Number
7. Fax Number
8. Contact Name
9. Email of contact person

**ACKNOWLEDGEMENT
OF
EVENT POLICY**

ACKNOWLEDGEMENT

I have received, read, and agree to the Policy For Events.

Name of Organization/Ministry: _____

Head of Organization/Ministry: _____

Signature

Date

SAN ANTONIO DE PADUA EVENT APPROVAL FORM

Today's Date: _____

Name of Organization/Ministry Requesting Event: _____

Chairperson/Director: _____

Telephone Number: _____ Email address: _____

EVENT INFORMATION

Event: _____ One Day Event Overnight Event

Place of Event: _____

Address: _____ City: _____

Telephone Number: _____ Email address: _____

Contact: _____ Date of Event: _____ Time: _____

Number Attending Event: _____ Permission Slips Required (children event): Yes No

SALES

Items being sold: Yes No If yes, describe: _____ Cost _____

VENDOR

Outside Vendor Needed: Yes No

If yes: Name of Vendor _____

Address _____ City: _____ Zip _____

Telephone Number _____ Fax Number: _____

Contact: _____ email _____

CHAPERONES

Chaperones Needed: Yes No Chaperone Ratio: ____ Adult for Every ____ children

NOTE: Ratio Maximum - 1 adult to every 10 children

All Chaperones: Fingerprinted: Yes No Safe Environment Trained: Yes No

Received Acknowledgement Page From Policy Against Sexual Misconduct Handbook: Yes No

TRANSPORTATION

Transportation Needed: Yes No If Yes, Method of Transportation:

Bus

Adult driving on own to and from event

Parent(s) take & pick up own child to and from event

Parent(s) drive on behalf of organization/ministry to and from event

Pastor's Approval Yes No _____

Pastor's Signature

Date

FACILITY POLICY & PROCEDURES

GENERAL INFORMATION

1. A scheduled "Parish Event" will supersede and take priority over any previously or regularly scheduled meeting or gathering. If possible another facility will be made available to those who are displaced.
2. If you have questions or concerns, please contact the Parish Office Monday through Friday from 8:00 am to 5:00 pm.
3. Special events require pre-approval and completion of required forms. Alcoholic beverages to be served at any event must have the approval of the Pastor. Selling of alcoholic beverages at an event requires a permit, details of which will be provided.
4. All ministries and organizations with the exception of special events are to leave the parish facilities by 10:00 pm.
5. Last minute requests should be the exception and not the rule and may not have the opportunity to be considered for approval.
6. Close windows, shut off lights that are not on sensors, and make certain all doors are locked prior to leaving.
7. Make certain that the facility is left in proper order prior to leaving.
8. Inform the Parish Office if the facility had been left improperly maintained when you arrived.
9. Inform the Parish Office if you find anything needing repair prior to your usage or during your usage of the facility.
10. It is your responsibility to inform the Parish Office as soon as possible if you will not be keeping your scheduled time allowing someone else to use the facility.
11. Inform the Parish Office of change in leadership, addresses, phones etc. in your organization, and/or change of those authorized to check out keys (no authorization given to children).

PLEASE NOTE: When children are present for a gathering or meeting; they must be supervised BY AN ADULT at all times.

FACILITIES RESERVATIONS

All facility use must be reserved through the secretary/receptionist in the Parish Office. This includes parking lot and courtyard use. Facilities will be reserved for a parish organization/ministry with a written request only. Submit Facility Reservation Form by fax 714-974-9630 or email request to lmarmolejo@sanantoniochurch.org. Include all information requested on the reservation form, including contact phone number. When you call to check availability your request isn't confirmed until the reservation form or email is received. Please call the Parish Office at 714-974-1416 ext. 100.

Use of the Parish Hall must be approved by the Pastor or in his absence, the Parochial Vicar. In addition it also requires the use of our Facility Coordinator for oversight of set up and decorations.

Courtyard use, outside of church, is to be limited to two or three groups and must be approved.

Meetings that include food should be reserved in Classroom 6 or the Parish Hall since these rooms are not carpeted. Exceptions will only be allowed when neither of these spaces are available and must be approved. Food in other facilities will be limited to easy to handle finger foods or foods that will not be difficult to clean. All organizations are asked to report any spills so that they can be cleaned in a timely and appropriate manner.

San Antonio Facilities are not rented out to or reserved for any outside organization or for private parties or receptions for parishioners or non-parishioners with the exception of funeral receptions (funerals that take place here), in which case no alcohol is allowed.

Any exceptions need written approval from the Pastor and must be hosted by a parish organization, i.e. Catholics at Work, hosted by Peace and Justice; Birth Choice, hosted by Respect Life. This would of course be subject to space availability and a parish organization's willingness to oversee the event.

KEYS

Keys are to be picked up from the Parish Office by 5:00 pm on the day of the event. Return keys to the Parish Office or use mail slot in the door of the Parish Office. **Keys are not to leave parish grounds nor are they to be duplicated.**

PARISH HALL

The Parish Hall has the capacity for 680 persons without chairs. With tables and chairs 300 persons is the maximum amount of seating available and is regulated by the fire marshal, so please plan accordingly. The following is a general inventory of what is available for set up.

13 long 10' fold up tables
14 long 8' tables
5 rounds for 10 persons
25 rounds for 8 persons
300 chairs

EQUIPMENT

1. Tables and chairs must be used at all times when serving food in Parish Hall.
2. All times needed in the Hall, including set up, decorating, etc. must be arranged with your Coordinator.
3. If the refrigerator or freezer is needed please notify your Coordinator for advance turn on.
4. If decorations are to be used, THIS SHOULD BE CLEARED THROUGH YOUR COORDINATOR. The following items **ARE NOT TO BE USED: thumb tacks, push pins, scotch tape, masking or duct tape or any other item that could damage the walls or tables.**

CATERERS

All organizations/ministries **MUST** use a caterer from our approved caterer list.

NO EXCEPTIONS!

CLEANUP

The complete clean up of the Parish Hall is the responsibility of your ministry, committee, and volunteers.

1. All trash cans are to be emptied. Please tie-up all trash can liners and deposit them in the dumpster which is located just outside the kitchen door in the parking lot.
2. Sweep and mop the floors.
3. Always stack the chairs in stacks of 12 unless your Coordinator tells you otherwise.
4. If the kitchen is utilized, please make certain:
 - a. Counter tops and sinks are cleaned.
 - b. Kitchen floors are swept and mopped.
5. If oven is used, it is to be cleaned.

6. If the coffee pots are used, they are to be washed and put away. Please do not empty coffee grounds into garbage disposal. Please put them in the garbage.
7. Any utensils used are to be washed and put away.
8. Make certain that the garbage disposal is run adequately so that no waste is left in the disposal.
9. If refrigerator or freezers are used, please make certain that any leftover food is removed and they are cleaned out. **Please do not leave ice in the freezer or refrigerator.**

Your Facility Coordinator is here to help oversee the smooth operation of your event in the Parish Hall. The coordinator cannot do that if he/she is doing things that your committee or volunteers should be doing e.g., setting up, refreshments, cleaning up, etc.

If flyers or bulletin announcements are printed for the Parish Hall, Please refer to the facility as the Parish Hall, not Glynn Hall.

Thank you for your corporation if you have any questions please contact the Parish Office or your Facility Coordinator.

FAILURE TO FOLLOW THE ABOVE PROCEDURES MAY RESULT IN SUSPENSION OF PRIVILEGES OF USE.

SAN ANTONIO DE PADUA RESERVATION FORM

Today's Date: _____ **ORGANIZATION:** _____

Event Name: _____ **Number of Attendees:** _____

Requested By: _____ **Contact:** _____

Phone No. (required): _____ **Email:** _____

ROOM(S) REQUESTED: _____

(If set-up and/or equipment required, please complete reverse side.)

Event Start Time: _____ **End Time:** _____

Set-up Time Needed: _____ **Clean-up Time Needed:** _____

Food being served? Yes No

Post event on San Antonio website calendar? Yes No

EVENT DATE(S): _____

- OR -

RECURRING EVENT

Frequency: Daily Weekly Day of the Month Every Every Other Sun. Mon. Tues. Wed. Thurs. Fri. Sat.

Every 1st 2nd 3rd 4th last

Date range from: _____ **to** _____

Skip dates/months of: _____

Does event involve the sale of goods? Yes No
If yes, what is being sold? _____ Cost _____

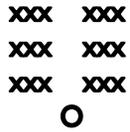
Does event involve a Speaker? Yes No
(If yes, Speaker Approval Form must be submitted to the Pastor.)

Does event involve children being separated from their parents? Yes No
(If yes, adults responsible for children **MUST** meet all Diocesan Safety Requirements and their names **MUST** be submitted to Parish Office for verification.)

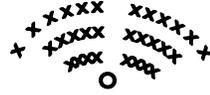
| |
|---|
| FOR OFFICE USE ONLY |
| DATE: _____ Submitted to Parish Office |
| _____ Pastor approval (Parish Hall) |
| _____ Submitted to the Facility Coordinator (Parish Hall) |

NOTE: Room Set-up will be arranged by parish maintenance staff based on time available, otherwise tables and chairs will be made available in rooms for each group to set-up and take down.

ASSEMBLY STYLE
(Chairs Only)



THEATRE STYLE
(Chairs Only)



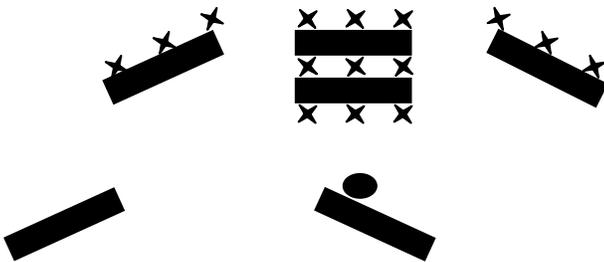
CIRCLE STYLE
(Chairs Only)



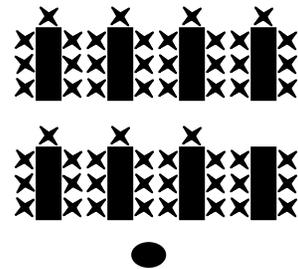
OTHER

Attach a separate sheet with diagram.

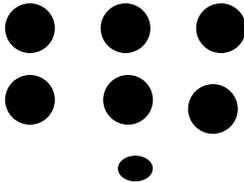
THEATER CONFERENCE STYLE WITH TABLES & CHAIRS



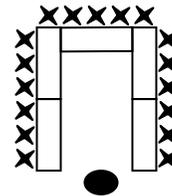
CLASSROOM CONFERENCE STYLE WITH TABLES & CHAIRS



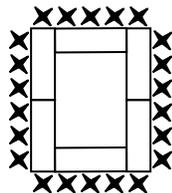
CLASSROOM CONFERENCE STYLE WITH ROUND TABLES & CHAIRS



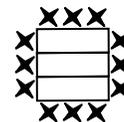
U SHAPE CONFERENCE STYLE WITH TABLES & CHAIRS



SQUARE SHAPE CONFERENCE STYLE WITH SPACE IN THE MIDDLE



SQUARE SHAPE CONFERENCE STYLE WITH NO SPACE IN THE MIDDLE



SPECIAL EQUIPMENT

MICROPHONE & STAND

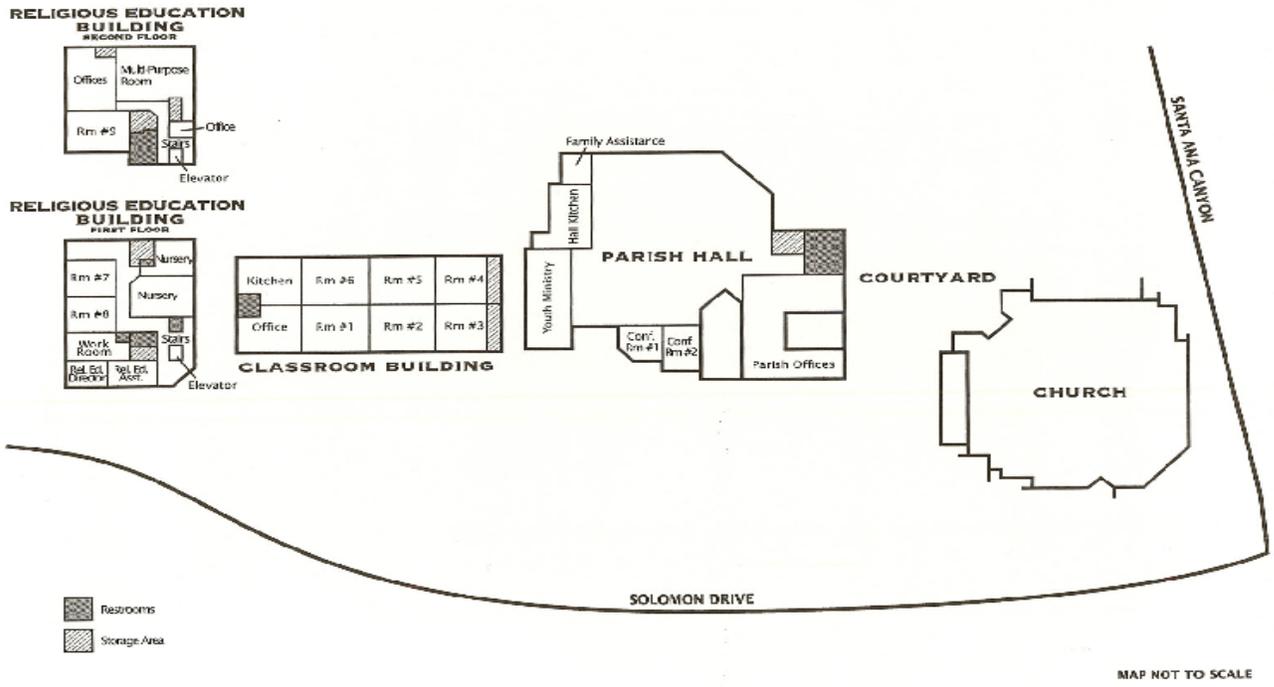
SOUND EQUIPMENT

TV/VCR (DVD)

OTHER _____

FACILITY MAP

San Antonio de Padua Parish Facilities Map



50/50 RAFFLES

To ensure compliance with state regulations, and as mandated by the Diocese of Orange 50/50 raffles are not to be held and are illegal.

The State of California Department of Justice - Office of Attorney General's Penal Code section 320.5, subdivision (b)(4)(A) states:

“90 percent of the gross receipts generated by sale of raffle tickets for any given draw are to be used by the eligible organization for charitable purposes. For example: An organization raised \$100 in ticket sales. It would be required to spend \$90 of that amount to further its charitable purposes, and only \$10 could be used to help pay for expenses or operating costs associated with conducting the raffle.

The organization is not precluded from using funds from sources other than the sale of raffle tickets to pay for the administration or other costs of conducting the raffle. However, the organization must exercise due care in using other funds. The misuse of restricted assets or the use of unrestricted assets which results in losses to the corporation may subject the board of directors to personal liability for breach of fiduciary duty. The 90/10 rule applies to 50/50 raffles, in which 50 percent of ticket-sale revenue is awarded as the prize and 50 percent of the revenue is retained by the organization conducting the raffle. 50/50 raffles are illegal because 90 percent of the gross ticket-sale revenue is not used for charitable purposes.

Penal Code section 320.5 is a criminal statute. Violations may be forwarded to the local district attorney, city attorney, or county counsel for investigation and possible prosecution. In addition, the Attorney General may take legal action under the provisions of the Nonprofit Corporation Law for breach of fiduciary duty or waste of charitable assets. The raffle registration may also be suspended or revoked. (See section 419.2(a)(2) of the raffle regulations, which can be found at: <http://ag.ca.gov/charities/raffles.php>.)”

SALES AND USE TAX

Although the parish is exempt from federal and state income tax, there is no similar broad exemption from California sales and use tax.

SALES TAX

As mandated by the California State Board of Equalization the parish **MUST** pay sales tax on the sale of tangible personal property such as books, candles, furniture, giftware, toys, clothing, novelty items, alcohol, sodas, silent auction items and any other items deemed necessary as mandated by the State Board of Equalization unless the sale is covered by a specific legal exemption or exclusion.

USE TAX

Use tax applies to the purchase of taxable merchandise that will be used, consumed, stored, or given away unless the purchase is exempt or excluded from tax. The parish must pay use tax on taxable purchases from out-of-state vendors including purchases made by mail order, telephone, or Internet

The use tax is complementary to, and exclusive of, the state sales tax. If the sales tax is paid to the vendor, no use tax is due.

If the item is donated at no cost to the parish, then the donor is responsible for the use tax on the donated property. No use tax is due from the parish.

The current rate for sales and use tax is 8%.

Any questions regarding the obligation of the parish to pay sales and use tax please contact the Parish Business Office.

SPEAKER POLICY

**All guest speakers MUST have the pastor's approval prior to an event.
All speaking agreements or contracts MUST be reviewed and signed by the pastor.
No one is permitted to sign any speaking agreements or contracts.**

GUEST SPEAKER FROM THE DIOCESE OF ORANGE (MARYWOOD)

Any organization who wishes to have a guest speaker from the Diocese of Orange (Marywood) for an event or for a parish event **MUST** have the pastor's approval prior to making a commitment to the speaker and reserving a room for the event.

The **Head of the Organization** must submit in writing to the pastor for approval the following:

1. Name of the speaker
2. Which department of the Diocese the speaker is from (i.e. Liturgy, Safe Environment)
3. Date and time of anticipated event
4. Speaker Topic

GUEST SPEAKER WITHIN THE BOUNDARIES OF THE DIOCESE OF ORANGE

Any organization who wishes to have a guest speaker, who is within the boundaries of the Diocese of Orange, for an event or for a parish event **MUST** have the pastor's approval prior to making a commitment to the speaker and reserving a room for the event.

The **Head of the Organization** must submit in writing to the pastor for approval the following:

1. Name of the speaker
2. Where the speaker is from (name of parish in the diocese, name of outside parish organization, etc.)
3. Date and time of anticipated event
4. Speaker Topic

The **guest speaker MUST** provide to the parish the following:

1. An updated curriculum vitae
2. A general outline of presentation
3. Speakers whose audience includes minors need to provide proof of completion of an adult training program for the protection of children and young people (e.g. Shield the Vulnerable).

GUEST SPEAKER FROM OUTSIDE THE DIOCESE OF ORANGE

Any organization who wishes to have a guest speaker from outside the Diocese of Orange for an event or for a parish event **MUST** have the pastor's approval **and** the Diocese of Orange approval prior to making a commitment to the speaker and reserving a room for the event.

The **Head of the Organization** must submit in writing to the pastor for approval the following:

1. Name of the speaker
2. Where the speaker is from (outside diocese, Religious Order)
3. Date and time of anticipated event
4. Speaker Topic

The **guest speaker MUST** provide to the parish the following:

1. A letter of good standing with the church
 - a. Priests and Deacons - letter from their bishop
 - b. Religious – letter from the major superior
 - c. Laity – from their pastor
2. An updated Curriculum Vitae
3. A general outline with date and location of presentation
4. Speakers whose audience includes minors need to provide proof of completion of an Adult training program for the protection of children and young people. (e.g. Shield the Vulnerable).

The parish will submit items 1-4 to the Diocese of Orange for their approval.

FINANCIAL FORMS REQUIRED

1. If the speaker is a US citizen and is to receive a stipend the amount will be processed through payroll. The individual who is to be paid **MUST** see the Parish Business Manager to complete the necessary paperwork prior to the event.
2. If the speaker is from another country and they are to receive payment in his/her name they must submit a copy of their passport and a signed form 8233 for possible exemption from withholding requirements.
3. If the speaker is from another country and payment is to be made to the foreign diocese or Religious order the legal name and address of the foreign diocese or religious order is to be supplied.

The Business Office will request the forms from the speaker.

STIPENDS

Payment for speakers **MUST** be processed through payroll. Proceeds from collections, donation baskets, drawings, etc. are not to be used as direct payment to speakers. No cash payments are permitted.

**ACKNOWLEDGEMENT
OF
POLICY FOR SPEAKERS**

ACKNOWLEDGEMENT

I have received, read, and agree to the Policy For Speakers.

Name of Organization: _____

Head of Organization: _____

Signature Date

SAN ANTONIO DE PADUA SPEAKER APPROVAL FORM

Approval by the pastor must be given prior to reserving a room.

Today's Date: _____

Name of Organization Requesting Speaker: _____

Organization Chairperson: _____

Telephone Number: _____ Email address: _____

Event: _____ Anticipated Date: _____ Time: _____

Speaker: _____

First Name

Last Name

Telephone Number: _____ Email address: _____

Speaker's Topic: _____ Children in attendance: Yes No

Speaker is from: Please check one of the following:

- San Antonio Parish
- Diocese of Orange (Marywood) (name of department) _____
- Within boundaries of Diocese of Orange (name of parish, organization etc) _____
- Outside of the Diocese of Orange (name of diocese, religious order, etc) _____
- Other (please specify) _____

Comments:

Pastor's Approval Yes No

Pastor's Signature

Date

THE USE OF LADDERS, LIFTING AND PREVENTING SLIPS, TRIPS AND FALLS PROCEDURES

LADDERS

1. No one under 21 years of age should be allowed to climb any ladder.
2. Volunteers should not climb higher than five feet off the ground.
3. Choose a ladder that is the correct height for the job.
4. Ladders should be inspected before each use to help assure side-rails and rungs are not broken or split and that the ladder is in good condition.
5. The manufacturer's directions for use (generally affixed to the ladder) should be strictly adhered to.
6. Only those with proper physical ability and training should use ladders.
7. Wear shoes with non-skid soles – not leather
8. Use the "4 to 1" rule. Count the number of rungs from the support point to the ground and divide by four – that's how many feet the ladder should be away from the wall. Don't stand on the top four rungs of a ladder or the top two steps of a step ladder.
9. Don't move a ladder while you are on it.
10. Don't lean too far to either side – keep your belt buckle between the rails.

LIFTING

Before you lift:

1. Lift a corner of the load to decide if you can safely lift and carry it.
2. If in doubt, use a dolly or hand truck or get help.
3. Plan a straight, flat route; remove anything in your way.
4. Loosen muscles with gentle bends and stretches.
5. Wear gloves and sturdy shoes with non-skid soles.
6. Avoid loose clothing you could trip over.

When you lift:

1. Stand close to the load.
2. Squat with knees bent and back straight.
3. Grip firmly.
4. Bring the load close to your body.
5. Push up slowly with your legs.

When you carry:

1. Carry the load waist high.
2. Take small steps.
3. Move your feet to change directions. Don't twist.

When you unload:

1. Lower the load slowly, knees bent.
2. Place the load on the edge of the surface and slide it back.

PREVENTING SLIPS, TRIPS AND FALLS

1. Wear footwear that is appropriate for the conditions inside and outside. On smooth or wet surfaces wear slip resistant soles. Avoid wearing high heels. On rainy days wear boots.
2. Clean footwear of mud, snow, etc. when entering a building.
3. Be aware of changes in elevation and changes in walking surfaces. When moving from carpet to tile or dry tile to wet tile, etc. the friction (grip) between the sole of the shoe and the floor surface lessens. Alter your stride to take shorter, slower steps.
4. Walk, don't run. When possible, stay on marked travel aisles and paths. Don't take "shortcuts" around machinery and equipment. Avoid areas that are cluttered or dimly lit.
5. When carrying a load make sure you can see over and around it. Scan the area ahead and plan your travel path. Get help to carry heavy or awkward objects. Use carts or other mechanical aids.
6. Clean up, correct, remove or report unsafe conditions such as spills, electric cords, frayed carpets, worn stairs and other hazards that could result in a slip/trip/fall injury. Warn others that a hazard exists by placing signs or cones or by isolation with caution tape or barricades.
7. Do not allow equipment, tools, materials or other obstacles to accumulate in aisles or walkways. Never store or place items on stairs.

8. Keep desk and file cabinet drawers closed when not being used or when unattended.
9. Always use a ladder or step stool. Never stand on a chair, desk, shelf, crate or box or any other unstable items to reach something. If you must routinely reach items in high locations, purchase a ladder or steps to allow it to be safely done.
10. Walk erect using even strides and good balance. Always use handrails when available.
11. Use “three point positioning” when entering or exiting cars, trucks, vans, etc. Maintain three points of attachment at all times; both hands and one foot or both feet and one hand. Enter and exit equipment facing it. Use all of the steps, never jump.
12. Maintain floors clean, free of water, oil or grease.
13. Keep your hands at your side not in your pockets.

VENDOR POLICY

It is the policy of the Diocese of Orange that any vendor who performs any type of services on parish/school property, which includes bus transportation, must comply with diocesan insurance requirements and be screened through Compliance Depot. Compliance Depot is a company the Diocese of Orange has partnered with to handle the necessary documentation needed to meet insurance requirements as well as background checks.

This will ensure that our vendors have the mandated insurance limits and amounts, are properly licensed, and not encumbered by outstanding judgments, criminal records/sexual offenses, or appear on any government watch lists.

Therefore it is the policy of San Antonio de Padua Church that all vendors, who perform any type of service, **MUST** be approved by the Business Office prior to an organization/ministry making any arrangements.

**VOLUNTEER DRIVERS FOR CHRISTIAN SERVICE
MASS, MEAL AND MEDICAL DELIVERY
POLICY & PROCEDURES**

Volunteer Drivers are volunteers whose assignment is specifically stated as providing transportation to and from Mass and medical appointments for the sole purpose of ministering in the name of San Antonio de Padua Parish and who provide this service without compensation.

VOLUNTEER DRIVER REQUIREMENTS:

1. Provide a valid California's driver license and proof of safe driving records.
2. Provide proof of insurance – bodily-injury liability and property damage insurance.
3. Provide the declaration page of their insurance policy.
4. All volunteers will be responsible for providing to San Antonio de Padua Parish any and all updated information regarding driver's license and proof of insurance. Without this, no one can be allowed to drive as a volunteer in the name of San Antonio de Padua Parish.
5. Any vehicle used for transportation must be in good working condition, have the proper vehicle registration, be licensed, and have passed any applicable state inspection.
6. Complete Volunteer Driver's Form.
7. A seat belt **MUST BE WORN** by the driver and all passengers at all times while car is moving.
8. Refrain from making side trips while in the performance of their assignment unless emergency situations dictate otherwise.
9. Take the most direct route to and from the Church and medical appointments.

VOLUNTEER DRIVERS RESPONSIBILITIES

1. Persons who are being transported are to be ambulatory.
2. A passenger who is in a wheelchair must be able to get in and out of vehicle with little assistance.
3. If a passenger needs to be lifted or carried in any capacity they should not be taken.
4. Obtain phone numbers to call in case of an emergency from the person being transported.
5. Ask elderly passengers if they would like your assistance before assisting them.
6. If the elderly passenger being transported refuses assistance, stay close to prevent them from tripping or falling.
7. When assisting elderly passengers, do not put too much pressure on the passenger's arm.
8. When letting elderly passengers on or off a vehicle, make sure the vehicle is in a safe place so the passenger won't have to step very far or trip.
9. Reserve front seats for elderly passengers.
10. Be sure elderly passengers do not sit too close to heaters or other such hazards.
11. Keep temperature controls warm in the winter and cool in summer.
12. In cases of an emergency dial 911.

VOLUNTEER DRIVERS FOR PICK-UP AND /OR DELIVERY OF NON-PERSON ITEMS POLICY & PROCEDURES

Volunteer Drivers are volunteers whose assignment is specifically stated as providing transportation for pick-up and delivery of non-person related items for the sole purpose of ministering in the name of San Antonio de Padua Parish and who provide this service without compensation.

VOLUNTEER DRIVERS REQUIREMENTS:

1. Provide a valid California's driver license and proof of safe driving records.
2. Provide proof of insurance – bodily-injury liability and property damage insurance.
3. Provide the declaration page of their insurance policy.
4. All volunteers will be responsible for providing to San Antonio de Padua Parish any and all updated information regarding driver's license and proof of insurance. Without this, no one can be allowed to drive as a volunteer in the name of San Antonio de Padua Parish.
5. Any vehicle used for transportation must be in good working condition, have the proper vehicle registration, be licensed, and have passed any applicable state inspection.
6. Complete Volunteer Driver's Form.
7. A seat belt **MUST BE WORN** by the driver and all passengers at all times while car is moving.
8. All articles being transported must be safely secured in the vehicle.
9. Refrain from making side trips while in the performance of their assignment unless emergency situations dictate otherwise.
10. Take the most direct route to and from pick-up and deliveries.
11. In case of an emergency dial 911.

