

**IOANNES FRANCISCUS**

**Divina Miseratione et**



**Apostolicae Sedis Gratia**

**EPISCOPUS MARQUETTENSIS**

**DECREE**

**PROMULGATION OF  
PERSONNEL POLICIES AND BUDGET FINANCE POLICIES  
FOR CATHOLIC SCHOOLS**

Following an ordinary review of the Personnel Policies and Budget Finance Policies for Catholic Schools in the Diocese of Marquette, it was deemed opportune to update these policies.

After consultation with the Diocesan School Board on August 19, 2014, after their review of the proposed policies and receiving a positive recommendation;

Having heard the Presbyteral Council on December 10, 2014 after their review of the proposed policies and receiving a positive recommendation; it is my decision to establish these policies.


Therefore, in accord with *CIC*, canons 8 §2, 29, and 391§1 I hereby decree and promulgate as particular law for the Diocese of Marquette the following Personnel Policies and Budget Finance Policies for Catholic Schools.


The former Personnel Policies and Budget Finance Policies for Catholic Schools in the Diocese of Marquette are hereby repealed and abrogated in accord with *CIC*, canon 20 §1.

Any policy or particular law of the Diocese of Marquette that is contrary to the Personnel Policies and Budget Finance Policies for Catholic Schools is hereby repealed and abrogated.

The provisions of this decree shall become effective July 1, 2015.

Given at the chancery in Marquette, Michigan this 8<sup>th</sup> day of January in the year 2015.

  
Most Reverend John F. Doerfler, STD, JCL  
Bishop of Marquette

  
Reverend Daniel J. Moll  
Chancellor

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## **Personnel Policies Revised July 1, 2015**

These policies have been approved by the Bishop of the Diocese of Marquette and are the only approved policies for contracted personnel of the schools in the Diocese of Marquette.

### **PRINCIPALS**

#### **4010 Principal Recruitment and Qualifications**

The Superintendent of Catholic schools shall be a member of the search committee. The appointment of a principal or interim principal shall have the final approval of the diocesan superintendent of Catholic schools. The Principal needs to meet the qualifying requirements of the accrediting organization of the school. Qualifications for certification and degree work may be temporarily waived by the superintendent under certain circumstances (candidate may be given a period of time, up to three years to meet all of the qualifications).

#### **4020 Responsibilities as Principals**

The principals are accountable to the pastor/pastoral delegate in all school matters and are obliged to know and implement philosophy, goals, policies, regulations, and practices of the diocesan school system and of their employing school.

#### **4030 Evaluation of the Principal**

The annual evaluation process of the principal shall be the responsibility of the pastor/pastoral delegate and the Diocesan Superintendent. The Diocesan Superintendent will coordinate the process in conjunction with the pastor/pastoral delegate.

#### **4040 Termination of Contract**

For the termination of school employees with written and signed employment contracts during the contract period, an employee can be terminated for reasons outlined in the employment contract. The Superintendent must be consulted before the termination process begins. The Superintendent will contact the Diocesan Fiscal Manager and Attorney for consultation. All compensation, including benefits, shall end at termination, unless otherwise stated in the employment contract.

## TEACHERS

### **4110 Recruitment and Qualifications of Teachers:**

The recruitment of teachers is the responsibility of the principal with the approval of the pastor/pastoral delegate.

The Diocese of Marquette voluntarily complies with the teacher certification code of the State of Michigan. All school teachers must present a valid state teacher certificate or permit before the contract of employment is signed. Teachers who are solely involved in catechesis are not required to hold state teacher certification. Qualifications for certification and degree work may be temporarily waived by the superintendent under certain circumstances (candidate may be given a period of time, up to three years to meet all of the qualifications).

Applicants for school employment who receive an offer of employment will be subject to a criminal history records check as described in Public Act 68 (1993) and those employed after 1996 will also be subject to an FBI check, including fingerprinting.

### **4120 Responsibilities as Teachers**

The teachers are accountable to the principal in all school matters and are obliged to know and implement philosophy, goals, policies, regulations, and practices of the diocesan school system and of their employing school.

### **4130 Evaluation of Teachers**

The performance of all instructional personnel shall be evaluated on an annual basis. The evaluation shall be thorough, fair, and objective---an assessment of the teacher's total performance in the school environment.

The evaluation shall be designed to assist teachers in the growth and development of professional abilities as well as to identify areas of strength and weaknesses.

The principal is the primary evaluator of teacher performance and shall be responsible for submitting teacher evaluation reports on a diocesan approved form to the Diocesan Superintendent of Catholic Schools.

### **4140 Termination of Contract**

For the termination of school employees with written and signed employment contracts during the contract period, an employee can be terminated for reasons outlined in the employment contract. The Superintendent must be consulted before the termination process begins. The Superintendent will contact the Diocesan Fiscal Manager and Attorney for consultation. All compensation, including benefits, shall end at termination, unless otherwise stated in the employment contract.

#### **4150 Shared Time Program Teachers**

It is expected that a shared time candidate will be qualified by training and experience for the position under consideration, and will exhibit the character and values consistent with the mission of the diocesan schools. In addition, it is expected that shared time faculty be held to the same performance standards as other faculty employed by diocesan schools.

#### **4160 Substitute Teachers**

The principal of the school shall engage a qualified teacher in the absence of the regular classroom teacher. Substitute teachers are subject to the same background checks and FBI fingerprinting as regular classroom teachers.

#### **4170 Teacher Aides:**

Persons employed in a non-instructional capacity need not be certified as teachers. Teacher aides are subject to criminal background checks and FBI fingerprinting as required by Michigan law.

#### **4180 Reduction of Teaching Staff:**

Teacher staffing needs are determined in the sole discretion of the principal and pastor. When the school needs to reduce the number of teachers, the principal should use these guidelines to make this decision (the following is not a priority listing):

- Subject/grade level taught
- Number of years a teacher has been employed at the school
- Academic qualifications/certifications
- Degree of compliance with school and diocesan policies
- Contribution to the development of the faith community
- Involvement in school extra-curricular activities
- Degree of teaching competency and commitment

#### **4190 Teacher Orientation**

The Principal shall conduct an annual orientation for all teachers before the opening of school.

This orientation shall include the following topics:

- A. The purpose and goals of Catholic education and the school's philosophy.
- B. The relationship of the school to the teaching mission of the church.
- C. Teacher job expectations: curriculum, resources, relationship to authority and degree of autonomy as a teacher.

- D. Religious expectations: personal and professional commitment to gospel values and the Church tradition, religious education, prayer, liturgies, social justice.
- E. Discipline policies and procedures.
- F. Extracurricular assignments.
- G. The supervision, evaluation, and professional development plan.
- H. Personnel policies and conditions of employment.
- I. Relationship of educational ministry of the school to other ministries of the parish(es).

### Employment

#### **4210 Non-Discrimination, Non-Harassment:**

The Diocese of Marquette expects all employees to conduct themselves with dignity and respect for fellow employees, students and others. It is Diocesan Policy to treat all persons, including employees and applicants for employment according to their individual merit. Diocesan Policy prohibits any form of harassment, joking remarks or other abusive conduct directed at an employee because of his/her sex, race, color, national origin, disability, religion, veteran status, height, weight, marital status or other protected characteristic. Therefore, a school will not condone, nor will it tolerate, harassment, discrimination, intimidation, or harassment of any employee based on any of the foregoing. This policy applies to all employment practices, including recruiting, hiring, pay, placement, promotion, termination and all other terms and conditions of employment.

Sexual harassment specifically, may take many forms, including but not limited to the following:

1. Conduct that has the purpose or effect of unreasonably or substantially interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment.
2. Employment decisions that are based on submission to or rejection of sexual advances or conduct.
3. Submission to a sexual advance or conduct that is either an explicit or implicit term or condition of employment.

An employee who believes he or she has been a subject of discrimination or harassment must immediately report it to the principal or to the pastor if the employee cannot go to the principal. An investigation of all complaints will be undertaken as soon as possible and to the extent possible consistent with thorough investigation, will be conducted in confidence. All personnel are expected to cooperate fully with any investigation. An employee found to violate this policy will be subject to disciplinary action up to and including immediate termination, depending on the circumstances.

Retaliation against an employee who reports discrimination or harassment, or who participates in an investigation of discrimination or harassment, will not be tolerated and will subject the offending employee to disciplinary action, up to and including immediate termination. An employee who believes he or she has been the subject of retaliation should immediately report it to the principal.

Provided, however that this policy shall not be construed to interfere with the right of the Diocese of Marquette pursuant to Policy 4220, or contract, to utilize religious hiring standards and to require as condition of continued employment to follow the teachings, beliefs and values of the Roman Catholic Church; and the right to terminate employment pursuant to Policies 4040 and 4140, or contract, for the failure to follow those teachings, beliefs and values.

#### **4220 Religious Standard in Employment:**

Principals hired to serve in our Catholic schools are expected to be Catholics in good standing and faithful to Catholic teachings and way of life. Primacy in hiring will be given to qualified teachers who are Catholic in good standing.

The distinctive and unique purpose of the Catholic schools is to create a Christian educational community that is enlivened by a shared faith among principals, teachers, students and parents. The teachers and principals employed in the schools of the Diocese are considered ministerial employees and must have knowledge of and a respect for the Catholic faith and a commitment to Christian living. Further, all teachers and principals are expected to spread the Catholic faith and supervise/participate in religious ritual and worship in propagation of that faith, including the observance and conduct of liturgy. As such, teachers and principals employed occupy a position and share duties of religious significance that is connected and important to the Diocesan doctrinal mission.

All teachers of religion in the schools of the diocese, including those involved in sacramental preparation, must be Catholic in good standing and endowed with a Catholic philosophy.

This hiring procedure is consistent with applicable law as applied to Roman Catholic educational institutions.

#### **4230 CATECHIST FORMATION POLICY**

Contracted Catholic School employees and faith formation coordinators will complete a total of 20 hours of catechetical formation each academic year, of which eight hours will be a retreat (which can be one eight-hour or two four-hour retreats). The course of study should include topics from any of the four pillars of the Catechism of the Catholic Church along with scripture. The local implementation of this policy is the responsibility of the local school pastor/pastoral delegate.

##### **A. Pastor/Pastoral Delegate Responsibilities:**



- Determine topics of formation on annual basis in consultation with the Principal and/or Local Faith Formation Coordinator.
- In a multi-parish setting the pastoral delegate, will facilitate a discussion with other supporting pastors to determine the years' priorities for the catechetical formation of their contracted school employees and faith formation coordinators.
- Contacting the Diocesan Superintendent of Schools and/or Director of Faith Formation for assistance and guidance as necessary.
- Pastor/pastoral delegate annually submits the written formation plan using the Catechist Formation Annual Plan
- Report to the Diocesan Office of Faith Formation by September 30th.

**B. Superintendent's Responsibilities:**

- Follows up with the Pastor/pastoral delegate ensuring a plan is in place.
- Monitors throughout the year that the plan is being implemented.
- Ensures each school has completed their plan and proper reporting is received at the Diocesan Office of Faith Formation.

**C. Principal's Responsibilities:**

- Meets with the pastor/pastoral delegate to develop plan.
- Ensures implementation of the plan at the local level.
- Provides proper reporting to pastor/pastoral delegate.
- Completes the Individual Employee Catechist Formation Report for each active contracted school employee and faith formation coordinator.
- Maintains a file of catechist formation for each active contracted school employee and faith formation coordinator (in their permanent personnel file).
- Submits electronically the School Catechist Formation Summary
- Report to the Diocesan Director of Faith Formation by May 15th.

**D. Teacher's Responsibility:**

- Participates joyfully in the catechist formation plan.
- Informs your principal of any additional formational activities.

**Reports:**

**A. Written Formation Plan**

- Use the Catechist Formation Annual Plan Form.
- Due to diocese September 30th.

**B. Reporting to the Diocese**

- Use the School Catechist Formation Summary Form.
- Due to diocese by May 15th.

**C. Personnel File**

- Use Individual Employee Catechist Formation Form.
- Place in employee individual personnel files by June 30th.

#### **4240 Exit Protocol/Interview:**

An exit interview is recommended for all voluntary employment separations. If a staff member voluntarily terminates employment, a letter of resignation signed by the terminating employee should be requested and placed in his/her personnel file.

#### **4250 Criminal Background Check**

Written consent must be obtained from an applicant at the time of application in order for the state police to conduct a criminal background check. Since the law requires criminal background checks only on new hires, not every applicant must have a search done; just those you intend to hire, even if they have been employed before.

The applicant will be fingerprinted by the Diocesan approved agency. Schools may offer conditional employment until the report is received and reviewed by the school.

Criminal history record information may only be used for evaluating the applicant's qualification for employment in the position for which he/she has applied. This information MAY NOT be disclosed to anyone not involved in evaluating the applicant's qualifications for employment.

### **Compensations and Related Benefits**

#### **4310 Compensation for Members of Religious Communities:**

In Michigan, compensation is ordinarily determined by the Religious Institute, Congregation or Order. The Religious Community sends its financial information directly to the parish/institution. Financial arrangements are handled with the Principal or Pastor.

#### **4320 Health-Medical Insurance**

The following constitutes a summary of health-medical insurance benefits available through the Michigan Catholic Conference. The actual terms of the benefit, contained in the plan documents, are available for review and shall govern in the event of any discrepancy between this summary and the plan documents.

1. All full-time employees are eligible to participate in the Michigan Catholic Conferences Health/Medical Insurance Program. Eligible employees are active full-time employees working at least 20 hours a week.
2. The employing school pays 80-90% of the employee's portion (single coverage) of the cost of the coverage for full-time employees working at least 40 hours a week.
3. Employees with dependents can, at their discretion, extend hospital/medical insurance to their dependents according to the MCC Hospital/Medical Program. The premium cost for dependent coverage shall be paid by the employee.

4. Employees enrolled in the MCC Hospital/Medical program must be enrolled in the MCC Flexible Benefit Plan.

#### **4330 Retirement Compensation**

The following constitutes a summary of retirement benefits available through the Michigan Catholic Conference. The actual terms of the benefit, contained in the plan documents, are available for review and shall govern in the event of any discrepancy between this summary and the plan documents.

Membership in the Michigan Catholic Conference Retirement Plan is mandatory for all full-time lay employees, (working 20 hours or more), of the seven dioceses of Michigan, employed in parishes, schools or other diocesan institutions under the direct jurisdiction of the Bishop.

Lay employee participation in the Retirement Plan is paid for by the employer.

#### **4340 Unemployment and Worker's Compensation**

The school shall maintain Unemployment Insurance and worker's compensation insurance coverages in accordance with state and federal statutes.

#### **4350 Disability benefits**

Disability Benefits. Full-time personnel are provided the protection of accident and sickness disability benefits.

Short-Term Disability Benefits. Subject to the expiration of ten (10) consecutive business days, an eligible staff member may receive short-term disability benefit payments for total disability at the rate of 66-2/3% of covered monthly salary. Short-term disability benefits are payable for a maximum of six months.

### **Personnel Records**

#### **4410 Personnel Records**

The principal shall keep accurate, complete and updated personnel records on file in his/her office. An employee's medical records or information shall be maintained separately from his/her personnel records. An employee's personnel and medical information shall be confidential and subject to disclosure only as provided by Michigan law.

#### **4420 Electronic Systems:**

All information created, stored, transmitted, received or contained in parish, school, or Diocesan electronic systems is subject to review by authorized managers without notice, at any time. These systems include telephone, voicemail, e-mail, computer, facsimile and copy machines and internet access systems. There should be no expectation of personal privacy when using these systems.

Each employee using these electronic systems consents to review of all contents of the systems by authorized parish, school, or Diocesan officials. Electronic systems are to be used for school business.

1. All information is subject to inspection without notice.
2. Systems may not be used in any way that violates harassment or discrimination policies, and may not be used to access, create, or store any information that is obscene or offensive.
3. Non-public information about school operations, personnel, and students must be kept secure and is not to be disclosed, copied, transmitted, or taken outside the school without written management authorization.
4. Accessing any system or portion of a system without authorization, or using another person's password or other access codes is prohibited. An Employee's family members or friends shall not be permitted access to electronic systems, except telephone.
5. Misrepresenting one's identity or sending information anonymously using the systems is prohibited.
6. Creating or allowing any outside access to these systems through modems or otherwise is prohibited unless authorized in writing. No employee may use passcodes, access files or retrieve any stored communications to which they do not have prior written clearance.
7. No software may be placed on any system except as expressly authorized by the school.
8. Employees who violate this policy are subject to discipline, up to and including termination of employment.

#### **4430 Personnel Policy Manual**

Each school shall provide employees with a copy of these Personnel Policies. Any procedures or practices at each local school must be consistent with these Personnel Policies and must be approved by the Diocese of Marquette. To the extent that any local procedures or practices are inconsistent with these Personnel Policies, these Personnel Policies shall prevail.

#### **4440 Health -Infectious Diseases**

The principal is to notify the Office of Catholic Schools immediately in the event any employee or student is identified as having a serious communicable or infectious disease (i.e. head lice, pinkeye, etc.)

The principal will work with the Office of Catholic Schools, the pastor, family, and physicians in developing an appropriate course of action.

Reports, records, data and information regarding a serious communicable or infectious disease is, in most instances, confidential and subject to limited disclosure.

#### **Absences from Work**

##### **4510 Jury Duty**

Employees called and absent because of jury duty will be paid the difference between the pay received for jury service and their regular salary, that is, the employee will receive regular pay reduced by the amount of the per diem allowance received from the court.

Employees may sign their jury pay over to the employer and then receive their full payment of salary. Employees selected for jury duty should immediately notify their supervisor. In most cases, jury duty does not necessitate full time absence from work and the employee is expected to fulfill the position's requirements to the greatest extent possible.

##### **4520 Absences/Sick Leave**

Contracted employees shall be granted paid absence from employment for health reasons or injury at the rate of one (1) day per calendar month employed. Unused absence for health reasons or injury may accumulate up to a maximum balance of twenty (20) days. Contracted employees who are hired on less than a full time basis shall earn a proportionate share of paid absence for health reasons or injury. No payment of unused sick leave will be given upon termination of employment.

An employee may use paid absence for his or her own illness or injury or to attend to the illness of the employee's immediate family. "Immediate family" for the sick leave policy includes the employee's spouse, children, parent or other relative living in the employee's home.

"Health reasons" include illness, pregnancy or related illness, injury, exposure to contagious disease endangering others, doctor or dentist appointments or for other similar absences that are approved by the supervisor.

During an absence in excess of five (5) days, the employee will notify the employer in writing as to probable length of absence and the Principal will request written notice from the employee's physician to verify the reason for absence and/or to ensure that the employee is physically sound and able to perform all normal duties of the employee's position upon return.

#### **4530 Bereavement**

Contracted employees shall be granted three (3) days of paid absence for the death or funeral of a member of the employee's immediate family. The term "immediate family" is interpreted to mean: spouse, children, step-children, foster-children, parents, step-parents, foster-parents, mother-in-law, father-in-law, grandparents, grandchildren, sisters and their spouses, brothers and their spouses, the sons-in law, the daughters-in-law, or any other relative of the employee or spouse residing in the household of the employee.

#### **4540 Personal/Business Days**

Contracted employees shall be granted two (2) days per year of paid absence for personal leave. Unless an emergency exists, the employee shall request the absence several days in advance from the school administrator. These personal leave days are to be taken within the calendar year and will not be carried over or paid for if not used. The minimum use of personal leave days will be in units of one-half day.

#### **4550 Leave of Absence without Pay**

The School Council may grant unpaid leave of absence for medical or personal reasons provided holding the position open will not interfere with its operation. As a general rule, unpaid leave granted for personal reasons will not exceed thirty (30) days. Unpaid leave granted for medical reasons, including child bearing, generally will not exceed three (3) consecutive months.

Except for emergencies or extenuating circumstances, requests for an extended leave of absence without pay beyond the 30-day time period must be submitted in writing to the principal at least thirty (30) calendar days prior to the date projected for the commencement of the leave. The leave may be approved for up to three (3) months, with a possibility of extension, not to exceed an additional three (3) months. Requests for such extensions must be submitted in writing by the employee to his/her principal prior to the expiration of the leave. Approval of a leave of absence does not guarantee that the same position will be available to the employee on his/her notification of intent to return to employment. The School will make an effort to place an individual returning from a leave of absence in a similar vacant position, should one exist, upon receipt of written notification of such intent to return to employment.

While on extended leave of absence without pay beyond 30 days, an employee will not be eligible for employer paid group health, disability, life insurance, or any other related benefit; nor will a

contribution be made to the Michigan Catholic Conference Retirement Plan. Length-of-service time will be frozen and, on return, will be considered in calculating vacation, sick leave and length of service for retirement purposes.