



ROMAN CATHOLIC DIOCESE OF
SAINT PETERSBURG

COURAGEOUSLY
Living the Gospel

Church Management Network Meeting

Thursday, February 26, 2026

*Bethany Retreat Center
18150 Bethany Center Dr.*

*Lutz, FL 33558
9:00 am – 1:00 pm*

“Courageously Living the Gospel”

9:00 am **Registration / Breakfast**

9:15 am **Opening Prayer / Welcome / Announcements**

Dr. Lois Locey, Chancellor for Administration/Chief Operating Officer

Communications Introduction & Survey

Ms. Allison Munden, Director of Diocesan Communications & Information

Budget Guidance

Mr. John Dey, Diocesan Finance Officer

Writing Job Descriptions

Ms. Giselle Gillis, Executive Director of Human Resources

Dr. Lois Locey, Chancellor for Administration/Chief Operating Officer

Development Updates

Mr. Robert Jurman, Senior Director of Development

Mrs. Francesca Bauer, Esq., Planned Giving Director

Mr. Yahir Bonet, Business Manager

New Diocesan Team Member Introductions

Dr. Maggie F. Keenan, Executive Director of the Catholic Foundation

Ms. Emeline McKeown, Director of Annual Appeals

Mrs. Lori Russell, Director of Donor Relations

Starting a Construction Project & “Big 3” Meetings

Mr. Hung Pham, Executive Director of Construction & Real Estate

12:00 pm **Closing Announcements, Prayer, & Lunch**

Dr. Lois Locey, Chancellor for Administration/Chief Operating Officer

Future Church Management Network Meetings

Unless otherwise noted, all meetings will take place at Bethany Retreat Center in Lutz and begin at 9:00 am. These meetings are for all those responsible for any aspect of Church Management in parishes, schools, and diocesan entities.

*** Pastors are welcome to attend**

2026:

April 23, 2026
June 4, 2026
August 13, 2026
December 10, 2026



2027:

February 16 – 27, 2027 – Church Management Network Gathering/Retreat (2-day overnight event)
April 22, 2027
June 10, 2027
September 30, 2027
December 2, 2027

2028:

February 8-9, 2028 – Church Management Network Gathering/Retreat (2-day overnight event)
April 6, 2028
June 8, 2028
September 21, 2028
December 7, 2028

COURAGEOUSLY

Living the Gospel

Church Management Network Meeting

Thursday, February 26, 2026

Bethany Center



Prayer – Adsumus Sancte Spiritus

We stand before You, Holy Spirit, as we gather together in Your name.

With You alone to guide us, make Yourself at home in our hearts;

Teach us the way we must go and how we are to pursue it.

We are weak and sinful; do not let us promote disorder.

Do not let ignorance lead us down the wrong path nor partiality influence our actions.

Prayer – Adsumus Sancte Spiritus

Let us find in You our unity so that we may journey together to eternal life and not stray from the way of truth and what is right.

All this we ask of You, who are at work in every place and time, in the communion of the Father and the Son, forever and ever.

Amen.

Announcements

Dr. Lois Locey



Coming soon...



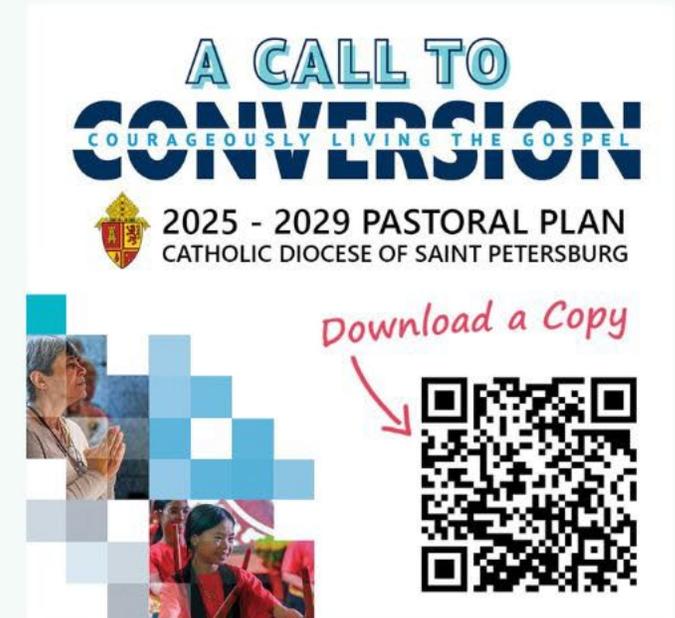
CENTER FOR APPLIED RESEARCH IN THE APOSTOLATE

Placing Social Science Research at the Service of the Catholic Church Since 1964

“Provide to deans, pastors, principals, and designated ministry leaders a comprehensive, evaluation tool that examines the effectiveness of all Pastoral Center ministries, the results of which will inform and shape Pastoral Center programming and staffing needs. Ministries will be evaluated on a three-year cycle.”

Goal 5, Call to Conversion #1, Putting it into Action #4

Courageously Living the Gospel - A Call to Conversion



2026 LEADERSHIP AWARD

“The diocesan motto,
“Courageously Living
the Gospel,”
so well influences
diocesan life, especially
HR administration.”

- National Association of Church
Personnel Administrators



**ROMAN CATHOLIC DIOCESE OF
SAINT PETERSBURG**

COURAGEOUSLY *Living the Gospel*

Please join us in CONGRATULATING our Human Resources Ministry in receiving the 2026 Leadership Award from the National Association of Church Personnel Administrators.

NEGOTIATIONS



ROMAN CATHOLIC DIOCESE OF
SAINT PETERSBURG

COURAGEOUSLY
Living the Gospel

A special
Church
Management
Network
Workshop



*For more
information
as the event
gets closer:*



With Dr. Joyce Russell

SAVE THE DATE
Thursday, August 13, 2026
at the Bethany Center



Communications

Allison Munden



As Director of Communications, I support our parishes, schools, and ministries by:

- Managing media relations and press inquiries
- Writing press releases and official statements
- Supporting crisis and sensitive communications
- Promoting major events and initiatives
- Overseeing diocesan social media and digital content
- Providing branding and messaging guidance

My goal is to help tell the story of our Diocese clearly, professionally, and in a way that supports your work.

I'm here as a resource — please don't hesitate to reach out.

Allison Munden, amunden@dosp.org, 925-222-8432



ROMAN CATHOLIC DIOCESE OF SAINT PETERSBURG
COURAGEOUSLY *Living the Gospel*

Help Us Improve Communication Across the Diocese

Tell us what's working — and what could work better.
Your input will help us improve how information is shared.
Scan the QR code to complete the form.



ROMAN CATHOLIC DIOCESE OF SAINT PETERSBURG
COURAGEOUSLY *Living the Gospel*

Writing Job Descriptions

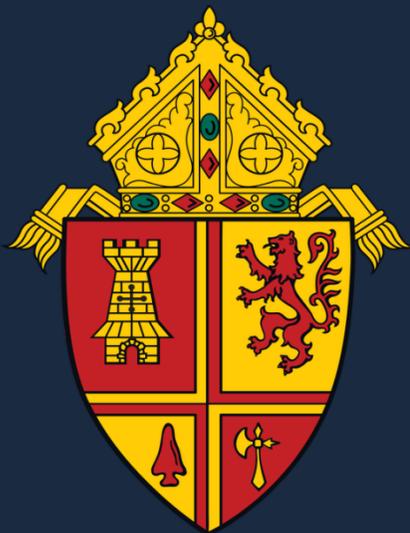
Ms. Giselle Gillis

Dr. Lois Locey



Job Descriptions

Supporting Pastors Through Professional Excellence



Presented by:
Dr. Lois Locey
Giselle Gillis



Understanding Job Descriptions

- Clarify how each role serves the Church's mission
- Frame work as ministry, not just tasks
- Provide direction so staff can serve with confidence
- Strengthen unity with the pastor and parish community
- Encourage faithful stewardship of time and talents
- Support fair and compassionate leadership
- Promote collaboration and mutual respect
- Help new employees feel welcomed and formed
- Provide clarity during difficult conversations
- Reduce confusion and burnout, keeping focus on Christ's mission



Why Hire Catholic?



Alignment

Hiring Catholic staff ensures their values and beliefs align with the parish mission and goals.



Understanding

Candidates with Catholic backgrounds possess a deeper understanding of teachings and community culture.



Ministry

Employing committed individuals enhances the effectiveness and cohesion of parish ministry efforts.

Importance of Job Descriptions

Accountability

Establishes expectations and standards for responsible stewardship of one's role.

Communication

Clear job descriptions ensure everyone understands their roles and responsibilities within the parish structure.

Performance

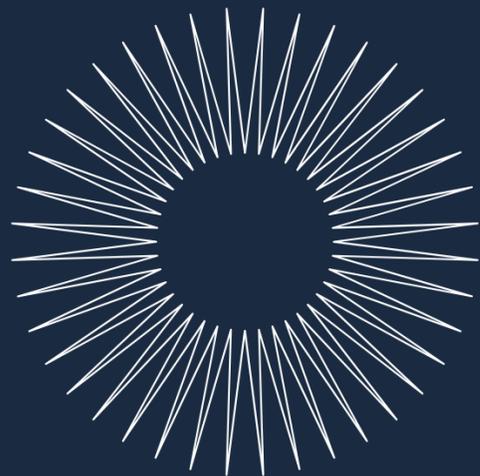
Formal descriptions aid in evaluating staff performance, aligning expectations, and facilitating constructive feedback.

Alignment

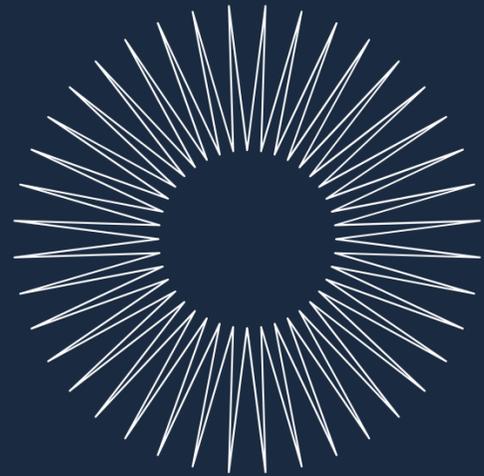
Connects daily responsibilities to the mission and priorities of the Parish.

Continuity

Preserves essential knowledge and responsibilities during staff transitions.



Areas of Job Description



Title

Clearly defines the position's role within the parish and aligns with overall church objectives.

Reporting

Identifies supervisory relationships and lines of accountability within the parish structure.

Exempt Status

Specifies whether the position is exempt or non-exempt according to wage and hour laws.

Date

Indicates when the job description was created or last updated to ensure accuracy and relevance.

General Duties Overview

The Job Purpose provides a high-level overview of the role, level, and scope of responsibility consisting of three or four sentences providing a basic understanding the “bird’s eye view” of the role. A concise summary of “why the job exists?”

Sample:

Catholic Church in City, FL, seeks a dynamic and collaborative Parish Business Manager to support the mission and life of the parish. Founded in 1924, the parish now serves over XXXX families. Reporting to the Pastor and serving on the Parish Leadership Team, the Parish Business Manager oversees administrative operations and stewards the parish’s financial, physical, and human resources with fiduciary responsibility. This role supervises the parish secretary, bookkeeper/accountant, maintenance staff, and receptionists, and ensures business practices align with the parish’s Mission, Vision, and Values. The Business Manager also fosters strong relationships with staff, volunteers, parishioners, the local community, and St. Name Catholic School personnel (if applicable).

Essential Functions/Major Responsibilities

This section contains a description of the duties and responsibilities assigned to the job; also referred to as the essential functions. They describe the fundamental nature of the job which occupies a large proportion of the incumbent's time.

Sample:

A. Parish Mission: Collaborates with the Rector, clergy, and staff to advance the Cathedral's mission through planning, implementing, and evaluating parish goals, with a focus on responsible stewardship of human, financial, and capital resources. Also participates in deanery and diocesan planning to ensure alignment with the broader diocesan mission.

B. Parish Facilities: Oversees the development and implementation of the facilities, equipment, and technology strategic plans. Manages major repairs, renovations, and capital projects. Acts as a liaison to Diocesan administrative offices. Oversees all aspects of parish security, leasing, rental, and parish facilities usage. Acts as a liaison to local government agencies.

Collaborative Relationships

List different ministries that work together or supervisor the incumbent will report to.

Sample:

The Parish Business Manager is directly accountable to and evaluated by the Pastor. The Parish Business Manager is accountable to the Pastor for time and attendance. Other collaborative relationships, include but are not limited to, the following offices

- Director of Parish Life
- Parish Finance Council
- Parish Ministry Leaders
- Stewardship Committee
- Tithing Committee

Skills/Qualifications

List specific skills and/or abilities required for the incumbent to be successful in this role; including the designation of any required licenses or certifications

Sample:

- Must be an active member of a Catholic community to express personal knowledge of the Catholic faith and commitment to Catholic ideals
- BA/BS in a related field, preferably Business Management or Church Management Administration, 5-7 years recent experience in a comparable leadership position recommended
- Possess a demonstrated ability to work in a collaborative fashion with diverse groups as well as have good, and healthy conflict resolution skills.
- Effective communication skills, including oral presentation and business writing. An ability to compose correspondence and reports

Physical Demands

Identify the working conditions and physical demands that relate directly to the essential job duties and responsibilities to be compliant with the Americans with Disabilities Act.

Sample:

This position is primarily based in an indoor parish office during regular core business hours; however, frequent evening and weekend hours are required to support parish operations, liturgies, meetings, and events. The role involves prolonged sitting, computer use, and telephone communication, with regular interaction with clergy, staff, parishioners, volunteers, and vendors. Because facilities oversight is a key responsibility, the Business Manager will regularly walk the parish campus and may occasionally stand, bend, reach, and lift materials typically up to 20 pounds. The work environment includes both office and parish facility settings, with moderate noise and frequent interruptions typical of an active parish. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Best Practices

- **Start with Purpose, Not Tasks:** Clearly state why the position exists and how it supports the mission of the organization. This helps candidates understand impact, not just duties.
- **Use Clear, Concise Language:** Avoid jargon, internal acronyms, and overly legal wording. Write so an external candidate can easily understand the role.
- **Focus on Essential Functions:** List the core responsibilities that truly define success in the role. Avoid long “laundry lists” of minor tasks.
- **Use Action-Oriented Statements:** Begin responsibilities with strong verbs (e.g., Oversees, Coordinates, Develops, Manages, Collaborates).
- **Define Reporting Relationships:** State who the position reports to and any supervisory responsibilities.
- **Separate Requirements from Preferences:** Distinguish minimum qualifications from “preferred” skills to avoid discouraging strong candidates.
- **Include Required Competencies:** Highlight key skills such as leadership, communication, financial acumen, confidentiality, collaboration, or pastoral sensitivity.

Best Practices

- **Be Realistic About Experience and Education:** Align requirements with the actual level of responsibility and compensation.
- **Include Physical Demands & Work Environment:** Required for compliance and clarity—especially important for roles involving facilities, travel, or irregular hours.
- **State Work Schedule Expectations:** Note evenings, weekends, travel, or on-call responsibilities up front to avoid surprises.
- **Ensure Legal and HR Compliance:** Avoid discriminatory language and include required statements (e.g., background check, Safe Environment). Include Practicing Catholic - covered under *Bona Fide Occupational Qualifications (BFOQ)*
- **Keep It Living and Current:** Review and update regularly as duties evolve.
- **Use Consistent Structure:** A standard format across positions improves clarity, fairness, and professionalism.

Conclusion

- A clear job description helps each person understand how their work participates in the mission of the Church and the life of the parish
- It offers a practical guide for the first 90 days, helping new employees grow in confidence, clarity, and purpose
- Well-defined roles foster unity, trust, and healthy collaboration among clergy, staff, and volunteers
- Aligning responsibilities with the parish mission supports faithful stewardship and service to God's people



“Clear expectations allow leaders to accompany, support, and encourage employees, because ultimately, we want every employee to flourish and be successful in their ministry.”



Development Updates

Mr. Robert Jurman

Mrs. Francesca Bauer, Esq.

Mr. Yahir Bonet



AGENDA

Development
Office

1 Introductions

2 Unrestricted
Endowments

3 Stock Gift Form
& Process

4 Capital
Campaigns

5 Q & A



Dr. Maggie Keenan

Executive Director of the
Catholic Foundation





Emeline McKeown

Director of
Annual Appeals





Lori Russell

Director of Donor
Relations





Unrestricted Endowments

Secure your ministry's
legacy for
generations.

Why An Unrestricted Endowment?

Provide parishes with perpetual funding, offering financial stability, the ability to pivot during crises, and the capacity to fund emerging ministries.



Why An Unrestricted Endowment?

Growth long term, forever, in perpetuity.



Endowments grow through income when investment returns (interest, dividends, and capital gains) exceed the amount withdrawn for spending.

Principal/Corpus: The original amount used to establish the endowment and is invested for long-term growth and never spent.



Why An Unrestricted Endowment?

Benefits of Unrestricted Endowments

- **Long-Term Financial Stability**
- **Perpetual Impact and Growth**
- **Operational Flexibility**
- **Enhanced Reputation**
- **Donor Legacy**
- **Strategic Planning**



Why An Unrestricted Endowment?

Donor Centric

- Donors want to give to things that make a lasting impact.
- Donors want to support an organization that is fiscally sound.
- Donors want to know that their gifts support the mission of the organization.





Unrestricted Endowment

Do you have
one?

Parishes

- Cathedral of St. Jude the Apostle
- Corpus Christi Catholic Church
- Nativity Catholic Church
- St. Jerome Catholic Church
- St. Mary Our Lady of Grace Catholic Church
- St. Patrick Catholic Church, Largo
- St. Raphael Catholic Church
- St. Timothy Catholic Church

Schools

- Bishop Larkin Interparochial Catholic School
- Christ The King Catholic School
- Clearwater Central High School
- Corpus Christi Catholic School
- Holy Family Catholic School
- Morning Star Catholic School - Pinellas Park
- Nativity Catholic School
- Notre Dame Catholic School
- Sacred Heart Catholic School (Pinellas Park)
- Sacred Heart Early Childhood Center (Dade City)
- St. Anthony Catholic School (San Antonio)
- St. Cecelia Interparochial Catholic School
- St. Jerome Early Childhood Center
- St. John Paul II Catholic School
- St. Paul Catholic School (St. Petersburg)
- St. Peter Claver Catholic School
- St. Stephen Catholic School
- Tampa Catholic High School

Ministries

- Bethany Center
- Catholic Charities
- Diocese of Saint Petersburg
Vocations
- Daystar Life Center of Citrus
County

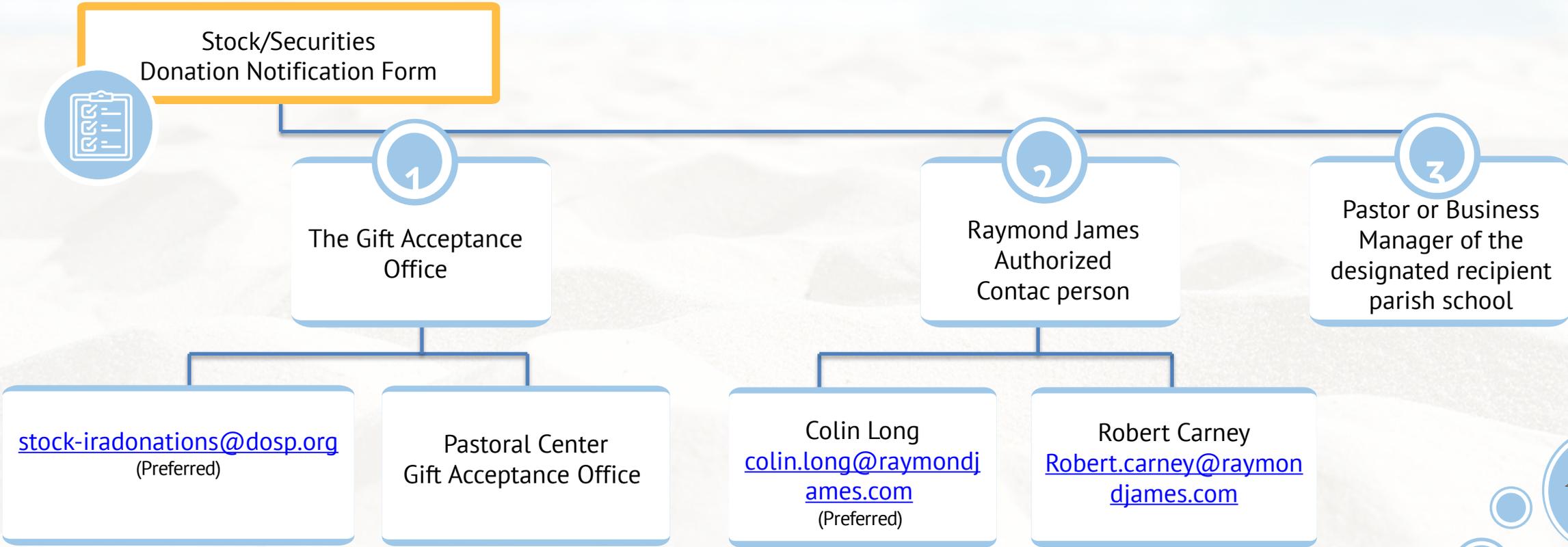


Stock Gift Acceptance

Review & New Stock
Form

Stock/Securities Donation

Instructions For The Transfer Of Securities



Stock/Securities Donation

Instructions For The Transfer Of Securities



Donor must contact their broker/agent to initiate a transfer of securities

The Diocese cannot initiate stock transfers on behalf of donors

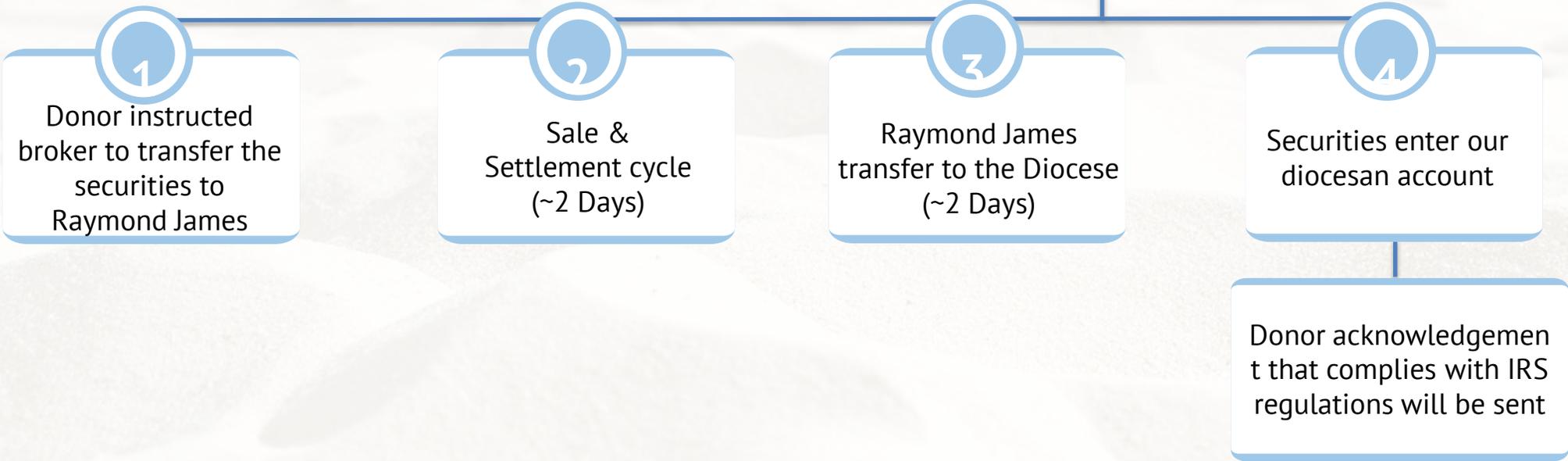


Stock/Securities Donation

Instructions For The Transfer Of Securities



Timeline

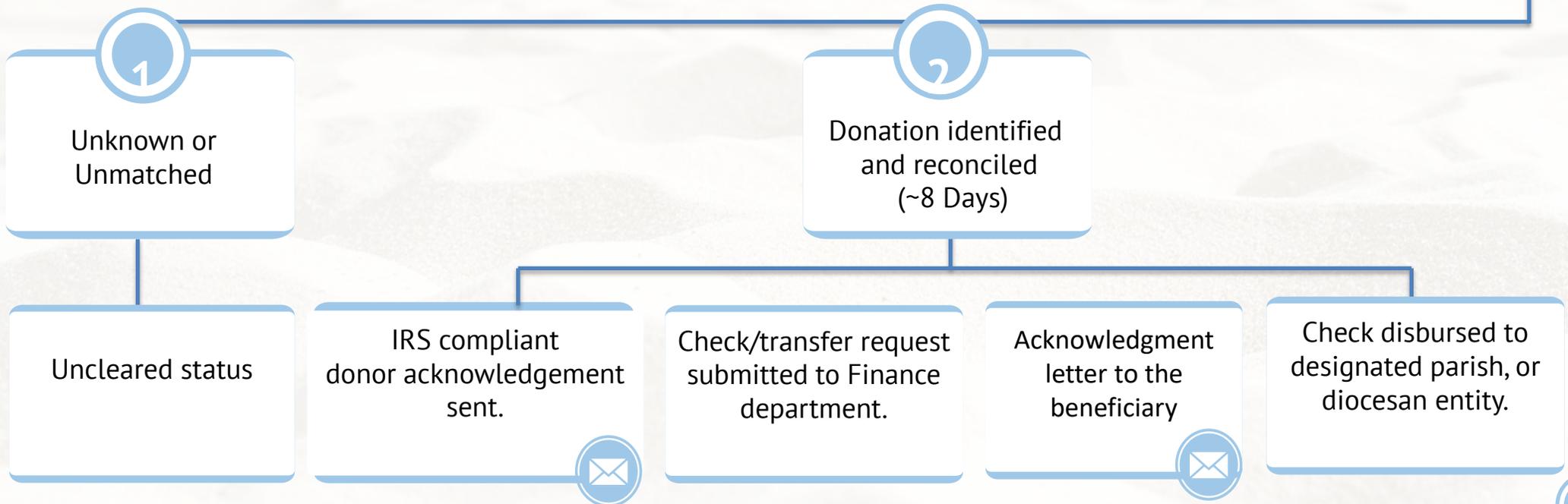


Stock/Securities Donation

Instructions For The Transfer Of Securities



Identify stock transaction



Capital Campaigns

What Development Assist You With...

- **Discernment Process & Campaign Guidance**
 - Permission to Fundraise Letter
 - Selecting a Consultant Firm
- **Gift Processing**
 - Give Central/Online Gifts
 - Checks, Cash, Stock
 - Qualified Charitable Distributions
 - Cryptocurrency and Real Estate
- **Data Processing & Management**
 - Salesforce Campaign & Pledges
 - Custom & Standard Reports
- **Donor Relations**
 - Updating Pledges & Salesforce Records
 - Troubleshooting Issues
 - Providing Donors w/ Instructions
- **Tax Receipts**
 - Sending tax statements



CONTACT US

We're ready to help!



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Francesca Bauer
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Lori Russell
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Yahir Bonet
YBonet@dosp.org



Mailing Address
6363 9th Ave N,
St. Petersburg, FL 33710

Starting a Construction Project & “Big 3” Meetings

Mr. Hung Pham



Courageously Living the Gospel Prayer

Almighty, ever-living God, by our baptism, we have been called to live as missionary disciples of your Son, Jesus Christ. Grant that we, your people of the Diocese of Saint Petersburg, will fulfill our purpose by proclaiming the Good News and inviting all people to encounter the love and mercy of Jesus Christ.



Courageously Living the Gospel Prayer

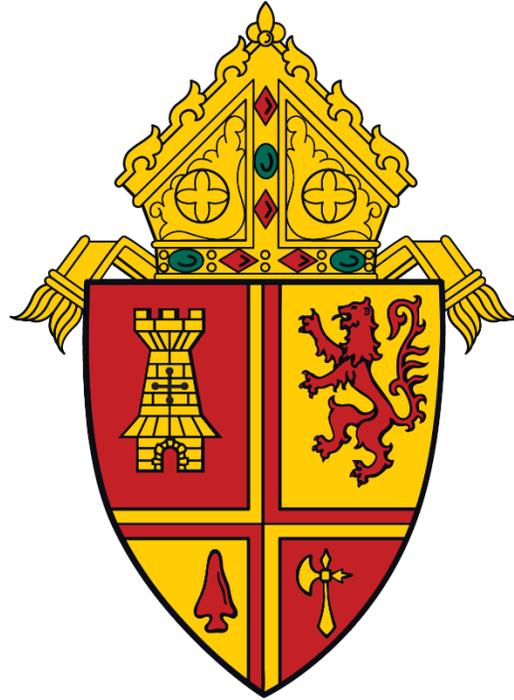
Deepen our trust in you, O Lord, and help us to remain steadfast in our commitment to Courageously Living the Gospel in our homes, neighborhoods, parish communities, and wherever you may lead us.



Courageously Living the Gospel Prayer

Together, with the intercession of our Blessed Mother and all the saints who have gone before us, we humbly ask for the courage to live as your disciples standing firm in our Catholic faith, through your Son, our Lord Jesus Christ. Amen





ROMAN CATHOLIC DIOCESE OF
SAINT PETERSBURG

COURAGEOUSLY *Living the Gospel*

Church Management Network Portal

Administration and Planning/Chancellor for Administration

🏠 > Administration and Planning/Chancellor for Administration

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CMHoly!7

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