



## **Catholic Diocese of Columbus**

### **700.0 - Employee Benefits**

Employees of Diocesan entities may qualify for benefits as part of their employment.

This section of the policy manual includes both policies as well as guidelines that will help Diocesan entities to administer proper employee benefit programs.

The policies and guidelines include:

701.0 – Qualification for Benefits

702.0 - Vacation, Sick, & Personal Days

703.0 - Retirement Benefits

704.0 - Employee Group Benefits

706.0 - Poster Compliance-Workman's Comp & Other Required Policies

707.0 - Cell Phone Policy

708.0 - Non-Smoking Policy

709.0 - Continuing Education/Tuition Assistance

710.0 - Employee Loans

711.0 - Break Periods



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### **701.0 - Qualification for Benefits**

The Diocese of Columbus offers a comprehensive benefit plan to its full-time employees.

The plan includes:

- Group Benefits
  - \* Medical
  - \* Dental
  - \* Life Insurance
  - \* Short Term Disability
  - \* Long Term Disability
  - \* Vision
  - \* Retirement

To qualify for Group Benefits, the following policies apply:

- All employees (which may include those ordained to the Permanent Diaconate) who are scheduled to work 30 hours per week for at least 10 consecutive months a year are eligible for group benefits.

Additional policies in effect are:

- Group benefits must be applied for within 30 days of hire, or applied for during Open Enrollment period. Employees may also make changes in their applicable benefit selections whenever they encounter a life-changing event. It is critical that when employees are added to payroll for the first time, the Diocesan entity makes sure that if the employee is eligible for benefits, they have completed and submitted the paperwork to the Insurance Office. Submission outside the 30 day period creates numerous difficulties and in most cases may result in a delay in employee coverage or denial of benefit coverage.
- An eligible employee, who chooses family coverage and the spouse is (or will be) enrolled in the Diocesan health plan and is eligible for **group** coverage at his or her place of employment, **and/or** the spouse is receiving any cash/credit from employer to purchase health coverage elsewhere, then the employee is to pay a premium to obtain coverage for that spouse.
- The Diocese of Columbus also offers an opportunity for part-time employees to purchase certain Diocesan benefits at a group rate. A part-time employee can choose to enroll in the following benefits, **paid 100% by the employee** through payroll deductions, provided that the part-time employee is scheduled to work 15 hours per week for at least 10 consecutive months a year and is receiving a W-2:
  - *Dental Insurance*
  - *Vision Insurance*
  - *Voluntary Life Insurance*
  - *Dependent Life Insurance*
  - *Spouse Life Insurance*



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### **701.0 - Qualification for Benefits**

- “Employee” is defined as an individual receiving a W2 form annually who is not a temporary or seasonal employee (i.e. independent contractors are not eligible for benefits).

The Insurance Office should be contacted if there are questions.

To qualify for Retirement benefits, the following policies apply:

- Lay Employees and Deacons fulfilling lay responsibilities – any full time lay employee. Full-time means regularly employed for not less than 30 hours per week and not less than twenty (20) weeks per year. An employee shall become eligible to participate in this Plan on the first day of the month coincident with or next following achieving full-time status.
- Priests Retirement Plan - any ordained Priest incardinated in the Diocese of Columbus. Each Priest shall become eligible to participate in this Plan on the later of his ordination or his incardination into the Diocese. Complete eligibility policy is contained in the Priests Retirement Plan document.

Prior to January 1, 2014, the Diocese offered a Defined Benefit Retirement Plan to its Lay employees. Plan documents should be consulted for eligibility for those plans. Both the Lay Employees Retirement Plan and Lay Teachers Retirement Plan were frozen as of December 31, 2013.

As further clarification on how to determine whether an employee qualifies to receive benefits, the following is provided:

The first criteria to consider is whether the employee is a “regular” employee or a “temporary or seasonal” employee. The definitions to use in determining the “type” of employee are:

- Regular employee – hired to work a prescribed full schedule of hours per week for his or her job category, either part time or full time. You should also consider whether you (as the employer) have an expectation of continued employment for the employee (i.e. they are not hired for a specific period of time). If you have this expectation and they meet the condition described above, then they are a “regular” employee. Please note that having an expectation of continued employment does not change the At-Will nature of the employment relationship, nor does it change your ability to offer or not offer a principal, assistant principal or teacher a contract for the next school year.
- Temporary or seasonal employee – hired for a specific period of time, usually less than 30 hours per week or for less than five months per year or 1000 hours.

It is important to note that an individual’s job description should contain information that assists in defining their job classification as regular, temporary or seasonal.

Some examples of “regular” employees include:

- A maintenance person hired to work 30 hours per week



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### **701.0 - Qualification for Benefits**

- A bookkeeper hired to work 40 hours per week
- A teacher hired to work 5 classes per day from the beginning of school until the end of school
- A secretary hired to work 15 hours per week (eligible for part-time benefits only)

Some examples of “temporary or seasonal” employees include:

- A maintenance person hired to work 30 hours per week for the three summer months
- A college student hired to help in the office at 40 hours per week for three weeks
- A substitute teacher, including long-term substitute teachers. Substitute teachers, are hired typically one day at a time. For long-term substitutes, they are hired for a prescribed time period and you would typically not have an expectation of continued employment beyond that time period.
- An interim principal hired to work for the remainder of the school year. The nature of the employment relationship is for a specified period of time and you would typically not have an expectation of continued employment beyond that time period.

Temporary or seasonal employees do not qualify for any Diocesan benefits. It is critical that during the hiring discussion you clearly explain that the employee is temporary or seasonal and that they are not benefit eligible.

For “regular” employees, the second criteria to use in determining if they are eligible to receive group benefits is whether they meet the eligibility requirements detailed at the beginning of this policy related to hours worked. A determination of whether or not they meet the eligibility requirements is based on the employee’s expected work schedule. For example, a maintenance person may have an expected work schedule of 30 hours per week. Some weeks they may work more than 30, some weeks less. Eligibility would be based on the 30 hours per week expected work schedule.

With the advent of the provisions of the Affordable Care Act, effective January 1, 2014, the determination of eligibility will be based, not on expected hours but on actual hours over a prior period of time (i.e. six months for 2014 benefits, 12 months for 2015 and after benefits). For new employees eligibility will still be set based on expected work schedule.

It is the responsibility of each Diocesan entity to review qualification for benefits each month. If an employee’s work schedule has been changed, this may lead to a decision to add them or remove them from benefits. Your assistance is necessary in order to assure that all employees who are eligible do receive benefits, and those that are not qualified, are excluded from benefits. Because of the complexities of the Affordable Care Act, changes in employee work schedules that increase their hours worked to over 30 or decrease their hours worked to under 30, should be discussed with the Diocesan Human Resources Office to assure they are properly included/excluded from benefits.



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### **702.0 - Vacation, Sick and Personal Days**

Parishes, High Schools, Interparochial/Consolidated Elementary Schools, Agencies and Institutions are to implement a written policy for vacation, sick days and personal days for the particular location for employees. All employees are to be provided with a copy and to provide written recognition that they have received the policy.

For schools, policies related to teachers may be provided under policies of the Office of Catholic Schools, the COACE agreement or other agreement.

#### **Guidelines that may help with the implementation of this policy follow:**

##### Vacation Days

Vacation could be granted according to the following provisions:

- The amount of vacation to which any employee is entitled depends on their status as management, exempt, or nonexempt staff, and upon their length of service. Length of service is computed from the first day of employment for the employee's current tenure and Diocesan entity.
- No employee may take more than 2 consecutive weeks off for vacation, and at least 2 work weeks must occur between vacation breaks.
- All requests for vacations must be submitted to the pastor/principal/director/administrator in writing.

Each calendar year (January 1 through December 31) or benefit year (12 consecutive months – i.e. the fiscal year) is a distinct unit.

All vacations must be taken during the calendar or benefit year to which the vacation applies, unless otherwise approved.

##### Sick Days

Employees may be paid for occasional legitimate sick days at the discretion of the pastor/principal/administrator/director. Examples of legitimate sick days are personal illness or, when necessary, to attend to a sick child, spouse or parent.

Regular employees working a minimum of 20 hours a week are eligible for the sick leave benefit as defined for full-time employees but on a prorated basis (i.e. a percentage based on hours scheduled per week as compared to the standard forty 40-hour week).



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### **702.0 - Vacation, Sick and Personal Days**

#### Personal Days

Diocesan personnel policy generally does not make provision for occasional personal days.

Employees who experience a need for personal time should discuss this with their pastor/principal/director, and such time may be granted at the discretion of the pastor/principal/director or the employee may use accrued vacation time that is available.

#### Paid Time Off

Instead of offering separate benefits for vacation, sick and personal days, an entity may choose to implement Paid Time Off, which sets one benefit that encompasses vacation, sick and personal days.

#### Carryover of Benefit Days

Unused vacation or personal days may not be carried over to a subsequent benefit year except for extenuating circumstances and expressly approved by the Pastor/Principal/Director.

If carryover of benefit days is approved, the amount carried over is to be used within the first six months of the new benefit year.

An entity written policy must clearly state if an amount of benefit days can be carried over and how much. It is recommended that a clear limit be established so as to reduce the liability for accrued benefit time that would exist at employee termination.

#### Accrued Benefit at Termination

The policy of the entity is to clearly state whether, upon termination, an employee is eligible to receive payment for unused benefit days. Under no circumstances should a terminated employee with less than one year tenure be compensated for unused benefit days.



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### 703.0 – Retirement Benefits

Every eligible employee has the benefit of a retirement plan. Participation in the Diocesan Retirement Plans is mandatory for eligible lay employees and priests (see **Policy 701.0** for terms of qualification for benefits).

Prior to 1-1-2014, the Diocese provided a set of defined benefit pension plans to eligible employees: Lay Employees Retirement Plan; Lay Teachers Retirement Plan and Priests Retirement Plan. The Lay Employees Retirement Plan and Lay Teachers Retirement Plan were frozen as of 12-31-2013. A professional consultant outside the structure of the Diocese administers these plans. The particulars of the plans are available from the Diocesan Personnel Office or the bookkeeper in each location.

As of 1-1-2014, the Diocese provides a defined contribution retirement plan to all eligible lay employees (including Deacon's fulfilling a lay employee's responsibilities). This plan is administered through an entity outside the structure of the Diocese. A Summary Plan Description is available through the Diocesan website, Human Resources page.

#### Through December 31, 2013 - Quarterly Pension Report and Annual Employee Benefit Statement

Eligible employees of the Diocese/Parish/Schools/Agencies and Institutions of the Diocese of Columbus are covered under the applicable Pension plan of the Diocese of Columbus.

**The present plan Administrator for the Diocese of Columbus is:**

**Findley Davies**  
**Retirement Focus Service Center**  
**1-888-917-7107**  
**<https://www.retirementfocus.com>**

#### After 12-31-2013 – Retirement Plan Reporting and Funding

Retirement Reporting to the Plan Administrator for lay employee retirement benefits will occur centrally through the Diocesan Insurance Office on a monthly basis. Funding will be automatically provided for both participant and employer contributions through the common payroll system.

Participants in the Diocese of Columbus Retirement Plan will receive quarterly statements from the Plan Administrator which will include contributions, earnings and information on each fund in which participant and employer contributions are invested.

Each eligible Priest will be covered by the Diocese of Columbus Priests Retirement Plan. Diocesan entities are to make contributions to the Plan, on behalf of each Priest, using the following guidance:

- 1 – payments, as determined by the Plan actuary, are for a calendar year
- 2 – entities will pay their contribution in July of each year based on who is assigned to the entity on July 1.
- 3 – keep in mind that when priests rotate out of a parish (either to another parish or to retirement), they are still



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### 703.0 – Retirement Benefits

in that parish on July 1 with the rotation taking effect after the first weekend of July. Therefore, an entity with a rotating priest pays for the outgoing priest, not for the incoming priest.

4 – for newly ordained priests, there would not be a pension contribution in the calendar year of ordination, since their assignment does not start until after the first weekend of July. Their first contribution would occur in the following year.

5 – for retiring priests, because they are still in place on July 1, their final contribution would be made by the parish they are retiring from.





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### **704.0 - Employee Group Benefits**

The Diocese of Columbus offers to qualified employees, insurance for their benefit and the benefit of their covered dependants. The following benefits are in effect:

- Medical – eligible employees may elect single, single + 1, or family coverage. Premiums are shared between employee and employer. Base and buy-up plans are available.
- Dental – eligible employees may elect single, single + 1, or family coverage. Premiums are shared between employee and employer. Base and buy-up plans are available.
- Life Insurance – all eligible employees receive \$50,000 of employer paid life insurance coverage. Additional coverage can be acquired at the election of the employee at an additional premium paid by the employee.
- Short Term Disability – all eligible employees are covered by employer paid STD insurance at 65%. Premium is paid by the employer.
- Long Term Disability – all eligible employees are covered by employer paid LTD insurance at 40%. The Premium is paid by the employer. Additional coverage to 65% can be acquired at the election of the employee at an additional premium paid by the employee.
- Vision – employee may elect single, single + 1, or family coverage, at their cost, to purchase vision coverage insurance. Base and buy-up plans are available.
- Flexible Spending Account – eligible employees may elect to have up to \$2,500 annually deducted pre-tax from his or her pay to cover the out-of-pocket medical, dental, and/or vision expenses the employee and/or family incurs.
- Dependent Care Account – eligible employees may elect to have up to \$5,000 annually deducted pre-tax from his or her pay to cover the out-of-pocket expenses associated with child care the employee incurs.

Eligible employees must apply for coverage within 30 days of their start date, during Open Enrollment, or when certain life changes occur.

The effective date for coverage is the first day of the month following the month in which the employee is hired or becomes eligible for benefits. Details are explained fully in the enrollment packet.

The Insurance Office may be contacted for a complete summary of benefits, for enrollment forms and for assistance with any questions that may arise. This information is also available on the diocesan website under the Insurance Office.

The Insurance Office should be contacted for the current schedule of shared premiums. In addition, the employee cost for additional levels of life insurance and long term disability insurance can be obtained through the Insurance Office or the diocesan website. An updated schedule of premiums for all coverage (not additional levels of coverage) will be available to all eligible employees each year during Open Enrollment.



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### **704.0 - Employee Group Benefits**

The employee share of group benefit costs, including elected additional coverage, is to be paid through payroll deduction. All premiums for medical, dental, vision, flexible spending (FSA), and dependent care accounts (DCA) are required to be deducted on a pre-tax basis.

Each location is responsible for communicating all terminations and transfers to the Insurance Office via the *Notice of Resignation /Removal from Active Status* form for terminations and the *Group Change and Enrollment* form for transfers (both forms can be obtained by contacting the Insurance Office or through the Diocesan website). Failure to submit these forms within 15 days of termination/transfer, will result in the location being responsible for premiums, even if not collected from the ex-employee, until notification is received by the Insurance Office.



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### **706.0 - Poster Compliance**

All entities are to post in a conspicuous place, the current requirements of the Ohio Labor Law and the Federal Labor Law. A “conspicuous place” is one that is easily accessible to employees and is frequented by them. If an entity has multiple buildings, the posters should be placed in multiple locations.

These come in poster form. To meet Federal Law requirements, the postings will consist of Disability Poster, Equal Employment Opportunity Poster, Family and Medical Leave Act Poster, Minimum Wage Poster, Polygraph Poster, Employee Rights Poster, and Uniformed Services Employment and Re-employment Rights Act Poster. For Ohio Law requirements, the postings will consist of Equal Employment Opportunity Poster, Minimum Wage Poster, and Minor Labor Poster

Other government posting requirements include workers’ compensation certification and OSHA posters/information.

All locations are to post the most current version of these posters. The most current individual posters can be found under the Human Resources page on the diocesan website at <http://www.colsdioc.org/Offices/DeptforAdministrationPersonnel/HumanResources/Forms.aspx>. The Diocesan Human Resources Office will provide an updated version of the posters each time they change.



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### **707.0 - Cell Phones**

Accident statistics show that the use of cell phones while driving distracts a driver's attention from traffic conditions.

To promote driver safety and to help reduce the possibility of vehicle accidents in connection with cell phone use, the Catholic Diocese of Columbus has adopted the following cell phone policy applicable to all employees and volunteers:

- Cellular phone calls, both incoming and outgoing, are not permitted at any time while driving a vehicle for church/school/agency/institution's business.
- Business includes travel between the employee's work site and external meeting locations, and between external meeting locations and the employee's work site.
- Accidents occurring while a driver is using a cellular phone may be considered preventable and subject to disciplinary action.
- A cellular phone's voicemail feature should be activated to store incoming calls while driving.
- This policy applies to both hand-held and hands-free cell phones.
- All non-emergency calls should be made once the vehicle is safely parked.
- Texting while driving on Diocesan business, both reading and sending, are prohibited

All employees are to sign an acknowledgement that they have reviewed this policy. The acknowledgement must be retained in the employee's permanent file.



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### **708.0 - Non-Smoking Policy**

The Diocese of Columbus/Parishes/Schools/Agencies are non-smoking facilities.

Smoking (which means inhaling, burning, or carrying any lighted smoking material) in a Diocesan facility by employees, vendors, and visitors is prohibited. This prohibition includes the use of e-cigarettes.

This includes:

- In any buildings or enclosed area under the control of the diocese/parish/school/agency (including offices, lounges, restrooms, meeting rooms, cafeterias, garages, storage and file rooms, elevators, hallways, stairways, etc.); and
- In any area immediately adjacent to the entrances or exits to buildings; and
- In any diocesan/parish/school/agency-owned vehicles while in use for business purposes.

These prohibitions apply at all times, and regardless of the presence or absence of other employees in the area.

Smoking is permitted on property outside buildings, enclosed areas, or vehicles, away from doors, windows, or other openings in the buildings.

Diocesan-owned properties serving as residences for ordained clergy shall be considered private, and those clergy living in those places shall make their own decisions regarding smoking in said private areas.

State and local statutes require the posting of signs on all primary entrances notifying guests that the facility is non-smoking. The signs must include details for reporting violations (i.e. the State of Ohio's reporting hotline number).

No adverse personnel actions will be taken or tolerated against a person who exercises any rights afforded by the law or who reports or attempts to prosecute a violation of the law. If any employee believes that he or she has suffered such an adverse personnel action in retaliation for the exercise of these rights, they may file a written complaint with the Moderator of the Curia.

Violations of this policy may be reported to the Chancery Office (614-224-2251) or to the State of Ohio's reporting hotline (866-559-6446).



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### **709.0 - Continuing Education/Tuition Assistance**

#### **Priests**

Priests Continuing Education is managed by the Office of Continuing Education, which is the main clearing house for matters pertaining to the continuing education of the priests of the Diocese of Columbus. It exists in close cooperation with the Office of the Bishop's Delegate for Priests and seeks to help all the priests in the Diocese in meeting their educational needs, but with special emphasis on the needs of priests incardinated in the service of the Diocese of Columbus.

It seeks to provide:

- Information on educational programs
- Direction for priests' retreats
- Direction for clergy conferences and priests' conventions
- Occasional special educational programming for priests
- Assistance to priests in finding funding for education and spiritual programs
- Consultation, staffing or funding for educational programming for small groups of priests in regional deaneries or support or study groups.

Each priest is entitled to a Professional Allowance from his parish or agency to go toward his continuing education and annual retreat. If funds are not available, he is to write to the Office of Continuing Education for Priests to make other arrangements.

#### **Lay Employees and Religious**

The offering of Continuing Education for lay employees or Religious within the Diocese of Columbus is at the discretion of each employing entity, set by the pastor/principal/administrator, or for Chancery and Cathedral Square staff, the Human Resources Office as approved by the Bishop of Columbus. If continuing education or tuition assistance is needed for any particular reason that pertains to the employment of the individual, the pastor/principal/administrator/Director of Human Resources would be the one to determine if and approve any funds that might be available for assistance.



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### **710.0 - Employee Loans**

The granting of loans to employees is highly discouraged.

No loans are to be granted to an employee by a parish, school, agency or institution without the prior approval of the Bishop of Columbus.

Loans to non-employees from Parishes, Schools or Agencies/Institutions are strictly prohibited.



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### **711.0 - Break Periods**

Non-exempt employees receive paid break periods not to exceed 15 minutes for each 4-hour work period (usually one in the morning and in the afternoon of each 8 hour workday).

Employees are not permitted additional breaks (i.e. for smoking, etc.) above and beyond what is allowed by this policy for any reason.

These break periods must be scheduled so as to ensure adequate coverage during those periods.

Break periods shall not be broken into shorter periods in order to increase the number of breaks.