

FINANCE OFFICE UPDATE – March 20, 2026

Business Manager News...Resources, Information, Updates and Training Opportunities to help you!

WELCOME TO MARK RUSSELL

Please join the Finance Department in welcoming Mark Russell as Assistant Director of Risk Management. In this role, Mark will support key risk management initiatives, including property and liability, Workers' Compensation, and Unemployment Compensation. With a strong background in Human Resources, he brings valuable expertise to the team, and we are excited to have him on board!

You can reach Mark via email at mrussell@catholicaoc.org or his office number at 513-263-6678.

BPIC NEWSLETTER

Attached is the early spring edition of the Bishop's Plan Insurance company newsletter. There are two great articles, Preparing for Spring: A Post-Winter Checklist and the Importance of Staff Awareness Training on Cybersecurity.

Questions: Contact Bill Maly via email at bmaly@catholicaoc.org

NAME UPDATE – CATHOLIC VALUES LONG-TERM INVESTMENT PROGRAM

Many parishes and schools participate in the Catholic Values Long-Term Investment Fund. This fund will now be known as the Catholic Values Long-Term Investment Program. This revision removes the word *Fund* and replaces it with *Investment Program* to better reflect the actual structure of the investment vehicle offered by the Archdiocese of Cincinnati.

Please note that this is solely a name change. The investment objective, underlying strategies, and full compliance with the U.S. Conference of Catholic Bishops (USCCB) investment guidelines remain unchanged.

We appreciate your continued trust and participation. If you have any questions, please feel free to reach out to Tom Twilling at ttwilling@catholicaoc.org.

OPEN ENROLLMENT

Preparations are well underway for the 2026-2027 benefit plan year upcoming open enrollment. We are working on administrative enhancements to the MyEnroll site, and the Open Enrollment Guide, as well as updating documents/forms for ease of use and simplified communication for you and your employees. We will be finalizing the dates for open enrollment and sharing them with you soon!

GALLAGHER LIVE WELL NEWSLETTER

Attached is the March 2026 Newsletter provided by Gallagher. This month the focus is on Nutrition. There are informative articles on Healthier Food Swaps, Rethink Your Drink and Culinary Medicine. All of the articles are packed full of good information and practical, easy to adopt ideas! Please share with your staff!

PROPERTY REMINDER

A quick reminder that any for profit use of property is prohibited*. This includes but is not limited to:

- Athletic Camps
- Club Sports and Leagues
- Fairs or bazaars
- Peach Truck sales
- Baseball Card Show
- Private sales of any kind

*AOC Document on Temporal Affairs: “separate agency of organization may not conduct a business or generate profit from actions which take place in a parish (school) tax exempt property. A TAX-EXEMPT PARISH HALL (FACILITIES) SHOULD NOT BE “RENTED” TO NON-PARISHIONERS. “

Please contact Bill Maly 513.263.3354 or Mark Russell 513.263.6678 with questions.

PAYLOCITY VIRTUAL TRAINING

Training for Business Managers

Name	Virtual Paylocity Day
Training Date	April 15, 2026
Training Time	9:00 am – 1:00 pm
Facilitator	Antoinette Allen
Registration Link	https://paylocity.zoom.us/webinar/register/WN_iRQLK8ASR6qPkZiYkbsKTA

Next Steps:

- Click the Registration Link above and complete the registration process.
 - You will receive an email invitation from Zoom with a link to the training. This invite can be placed on your calendar.
- Be sure to verify the time zone for your session as it typically defaults to Central Time.
- If others join you in the training, simply forward this email to them so they can register. It is important that each participant completes their own registration.
 - Once registered, they will each receive an email invite from Zoom with a link to the training.
- If you need to cancel your training, please email me with as much notice as possible.
- If you do not receive the email invitation or have questions, reach out to Mary Jones.

Training Day:

- On the designated date and time of training, each participant should simply click on the "Join Zoom Meeting" link that is in the email invite you received from Zoom and “enjoy your training!”

Agenda will be shared on a future date. Questions: contact Mary Jones mjones@catholicaoc.org

HAVE A GREAT WEEKEND!