IMMACULATE HEART OF MARY
CATHOLIC SCHOOL

Immaculate Heart of Mary School, immersed in the teachings of the Catholic Church, is dedicated to providing excellent spiritual and academic formation in the development of well-rounded individuals centered in Christ.

Immaculate Heart of Mary School

Board of Education Policy Manual

SUBJECT: Annual Budget

POLICY#: 3010 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Budget Development

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall develop an annual budget which is approved by the Pastor and the Parish Finance Council. The Immaculate Heart of Mary School Board shall act in an advisory role to the pastor and principal in monitoring budget expenditures and revenue throughout the year.

Certified: Regin Wrigs Date: 3.4.14
BOE President

Approved: F. Z [illegible] Date: 3-11-14
Pastor

Acknowledged: Stacy M. Slonski Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Balanced Budget

POLICY#: 3012 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Providing a Balanced Budget

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall work collaboratively with the pastor/business manager to prepare a balanced budget and submit it to the Parish Finance Council/Pastor for final approval.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Immaculate Heart of Mary School

Board of Education Policy Manual

SUBJECT: Budget Time Line

POLICY#: 3016 Reviewed/Approved Date: **February 12, 2014**

PURPOSE:

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall submit an annual school operating and capital budget that may follow this time line below:

November/December – Submit preliminary budget proposal to their School Board
December/January – School Board approval of preliminary budget
January/February – Presentation of budget to the Finance Council
February – Approval of tuition rates and preliminary budget by the Finance Council
March – Update preliminary budget with projected diocesan rates (health insurance, utilities, etc.)
April - Presentation of updated 3-year operating budget and
5-year capital budget to the individual School Board and Finance Council
May – Approval of budgets (operational and capital) by the Finance Council for submission to the Office of Catholic Schools

Certified: Regis Wong Date: 3.4.14
BOE President

Approved: [signature] Date: 3-11-14
Pastor

Acknowledged: Stacy M. Slowik Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Capital Expenditures

POLICY#: 3025 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Approving Capital Expenditures

Type: D

POLICY CONTENT:

Capital expenditures that exceed $10,000 in any school year must first be approved by the Pastor and Parish Finance Council and then presented to the Diocesan finance office for approval.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Credit Card/ Open Purchase Orders

POLICY#: 3040 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Credit Card/Open Purchase Order Use

Type: D

POLICY CONTENT:

The use of credit cards or open purchase orders should be discouraged. The Business Manager / Principal will be responsible for the use of these for the school. The sole use of a credit card or open purchase order should be for goods or services necessary for the operation of the school. Appropriate documentation must accompany all transactions.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Expense Reimbursement

POLICY#: 3041 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Reimbursement of Expenses

Type: D

POLICY CONTENT:

Only budget expenses that were approved prior to the purchase will be reimbursed to the staff member making the request. All expenses requiring reimbursement will have appropriate documentation submitted at the time the reimbursement request is made. All expense reimbursements should be reasonable and generally should not include alcohol. Expense reimbursement for entertainment purposes should have prior approval.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Club and Organization Accountability

POLICY#: 3042 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Accounting of School Affiliated Organizations

Type: D

POLICY CONTENT:

No organization affiliated with the school will keep separate checking accounts or make their own payments on behalf of the school. All monies are to be kept by the parish or school business office which will provide the organization or club a regular accounting of those funds.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: Stacy M. Slawski Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Club and Organization Payments

POLICY#: 3043 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Payment of Club and Organization Expenses

Type: D

POLICY CONTENT:

All clubs and organizations that have expenses requiring payment will submit those payment requests to the school/parish business office for payment. Proper documentation must be included.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Allocations of Non-Direct Costs (i.e. Shared Compensation, Plant Costs, etc.)

POLICY#: 3060 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Allocation of Indirect Costs

Type: D

POLICY CONTENT:

Allocations of non-direct costs should be consistently made in parish schools by a standard formula (i.e. square footage, hours worked, budgeted FTE's, etc.)

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Average Class Size Minimum

POLICY#: 3070 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Establish Guidelines for Average Minimum Class Size

Type: D

POLICY CONTENT:

The minimum average class size within Immaculate Heart of Mary School should be maintained at no less than 18. When the average class size falls below this number, it begins to threaten the long-term sustainability of the school and parish ministry. For long-term sustainability and the financial health of the school, consideration should be given to creative ways to move class size as close to the maximum guidelines as stated in Policy 5202, Curriculum and Instruction.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Property Damage

POLICY#: 3080 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Establish Guidelines for Replacement of Property Damage

Type: D

POLICY CONTENT:

Parents of students shall be held responsible for the replacement of property and materials damaged or lost through the negligence of their children, at the discretion of Immaculate Heart of Mary School Administration.

Certified: _____ Date: 3.4.14
BOE President

Approved: _____ Date: 3-11-14
Pastor

Acknowledged: _____ Date: 3-4-14
Principal

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Board of Education Policy Manual

SUBJECT: Parishioner in Good Standing

POLICY#: 3130 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Criteria for Considering Parishioner in Good Standing Status

Type: D

POLICY CONTENT:

When determining whether or not a family is to be considered parishioner's in good standing, Immaculate Heart of Mary Parish and School shall consider the following minimum criteria:

To Qualify for the full amount of Immaculate Heart of Mary School Parish support available per enrolled student as indicated on the form, the enrolling parent(s) must be registered at Immaculate Heart of Mary Parish and attend Mass at Immaculate Heart of Mary Parish on a regular, weekly basis, as evidenced by the regular use of weekly offertory envelopes as well as involve themselves in parish ministries.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Tuition Waiver

POLICY#: 3150 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Tuition Waiver

Type: D

POLICY CONTENT:

If financially feasible, Immaculate Heart of Mary School may waive a portion of the tuition for the child(ren) of school and Parish staff. Waiver percentage and eligibility are defined in the school's Personnel Handbook.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Tuition Collection / Offertory Giving

POLICY#: 3155 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Separation of Tuition Collection / Offertory Giving

Type: D

POLICY CONTENT:

Written agreements, tuition payment guidelines/policies, criteria of parishioner in good standing, or any other tuition related documents must ensure that all offertory giving is voluntary. Offertory giving shall be encouraged. There can never be a quid pro quo such as trading of services in lieu of tuition.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Tuition Management / Procedure

POLICY#: 3160 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Establish Guidelines for Tuition Payment Procedure

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall have a formal tuition payment procedure which includes (a) full payment, (b) semester payments, and (c) a monthly payment plan. Immaculate Heart of Mary School may consider the semester payment plan and the monthly payment plan requires an automatic transfer of funds and/or a third party tuition collection company. The procedure shall address late payments, school fees, and tuition owed from previous years.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Non-Admission of Students Due to Tuition Delinquency

POLICY#: 3161 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Handling Tuition Delinquency

Type: D

POLICY CONTENT:

Families failing to pay tuition, according to the school tuition payment guidelines, will be informed that their student(s) may not be re/admitted to the school. If families are not current in their payment of tuition.

Immaculate Heart of Mary School shall have a formal delinquent tuition payment procedure which includes (a) full payment, (b) semester payments, and (c) a monthly payment plan. Immaculate Heart of Mary School may consider the semester payment plan and the monthly payment plan requires an automatic transfer of funds and/or a third party tuition collection company. The procedure shall address late payments, school fees, and delinquent tuition owed from previous years.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Registration Fee

POLICY#: 3165 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Fee Establishment of Registration Fee

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall collect a registration fee as a good faith commitment. This registration fee is not refundable.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Cost Per Student

POLICY#: 3166 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Tracking Per Student Cost

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall strive to monitor the cost per student closely, while tracking diocesan norms as documented in the annual Diocesan Catholic Schools Statistical Report.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Immaculate Heart of Mary School

Board of Education Policy Manual

SUBJECT: Tuition Norms

POLICY#: 3167 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide for the Maintenance of Tuition Norms

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall strive to maintain the recommended Diocesan tuition norms.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

IMMACULATE HEART OF MARY
CATHOLIC SCHOOL

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Immaculate Heart of Mary School

Board of Education Policy Manual

SUBJECT: Bishop's Scholarship and other Diocesan Scholarship Requirements

POLICY#: 3168A Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Application of Diocesan Scholarships

Type: D

POLICY CONTENT:

Parents of students applying for scholarships must demonstrate financial need by completing the third-party financial assistance application process. If families qualify for assistance, scholarships will be granted from available funds with:

-Verification from the Parish Office and/or Pastor that the families are members in good standing and are involved in the life of the parish.

-Verification from the principal that the students maintain good conduct, attendance, and substantial academic progress.

Immaculate Heart of Mary School may use the same third-party assessment provider as the diocese.

Certified: _____ Date: 9/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

IMMACULATE HEART OF MARY CATHOLIC SCHOOL

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Immaculate Heart of Mary School

Board of Education Policy Manual

SUBJECT: Kilgore Scholarship Requirements

POLICY#: 3168B Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Provide Guidelines for Application of Kilgoar Scholarships

Type: D

POLICY CONTENT:

Parents of students applying for scholarships must demonstrate financial need by completing the third-party financial assistance application process. If families qualify for assistance, scholarships will be granted from available funds with:

-Verification from the parish office and/or Pastor that the families are members in good standing and are involved in the life of the parish.

-Verification from the principal that the students maintain good conduct, attendance, and substantial academic progress.

Immaculate Heart of Mary School may use the same third-party assessment provider as the diocese.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Admissions Policy (Re: Outstanding Tuition at Other Schools)

POLICY#: 3170 Reviewed/Approved Date: **February 12, 2014**

PURPOSE: Establish Guidelines Regarding Outstanding Tuition

Type: D

POLICY CONTENT:

Families that have outstanding tuition in a Catholic school within the Diocese of Grand Rapids shall not be considered for admission to Immaculate Heart of Mary School until arrangements for the outstanding tuition have been made.

Certified: _____ Date: 4/30/14
BOE President

Approved: _____ Date: 4-30-14
Pastor

Acknowledged: _____ Date: 4-30-14
Principal

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Board of Education Policy Manual

SUBJECT: Parish Support of Catholic Schools

POLICY#: 3330 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Parish Support of Catholic School Education

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School shall strive to maintain the norm for parish support as directed by the diocese of Grand Rapids.

Certified: _____ Date: 1112/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: Monies in School Building

POLICY#: 3410 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Money Raised in School

Type: D

POLICY CONTENT:

Monies collected by school employees and by student treasurers shall be handled according to the procedures stated in the **Parish Business Practices Survey** located on the diocesan website. If there are activities conducted in the school transacted with cash, that cash must be maintained under dual control (see Policy 3430) and deposited in parish accounts on a daily basis. The person responsible for the fund raising activity should provide a weekly accounting report for the activity.

Certified: _____ Date: 1/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: Petty Cash

POLICY#: 3420 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Handling Petty Cash

Type: D

POLICY CONTENT:

Petty cash should be kept to a minimum amount (depending upon the size of the operation), reconciled every month, kept under lock and key. A single individual (other than the person reconciling the account) must be responsible for the account. It may be replenished as needed, when supported by the receipts. Petty cash should be used only when necessary.

Certified: _____ Date: 1/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: Cash Receipts

POLICY#: 3430 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Handling Cash Receipts

Type: D

POLICY CONTENT:

Whenever possible, there will be separate individuals assigned to the receipt of funds and the counting of funds. A separate individual should count the money, another should verify the amount of the deposit, and both (unrelated to each other) should approve the deposit before submitting it to the business office.

Certified: _____ Date: 11/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: Cash Disbursements

POLICY#: 3440 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Handling Cash Disbursements

Type: D

POLICY CONTENT:

Invoices shall be approved by the appropriate school personnel and submitted to the business office for payment.

Certified: _____ Date: 1/12/15

BOE President

Approved: _____ Date: 12-15-14

Pastor

Acknowledged: Stacy M. Slomski Date: 11-12-14

Principal

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Board of Education Policy Manual

SUBJECT: Guidelines for Fund Raising Activities

POLICY#: 3450 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Fund Raising Activities

Type: D

POLICY CONTENT:

1) Immaculate Heart of Mary School Shall plan and development activities that are community building, mission compatible and focused in terms of their fund raising nature.

2) Fund raising activities may need approval from one or more of the following:
   A) Principal
   B) School Board
   C) Pastor
   D) Finance Council

Certified: _____ Date: 11/12/15
BOE President

Approved: _____ Date: 12-19-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: SCRIP and Other Incentive Programs that Promote For-Profit Organizations

POLICY#: 3455 Reviewed/Approved Date: **November 12, 2014**

PURPOSE: Provide Guidelines for Use of Incentive Programs

Type: D

POLICY CONTENT:

If Immaculate Heart of Mary School does wish to offer a SCRIP or similar program, the necessary shall be sought prior to approval.

Certified: _____ Date: 11/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: 1099 Forms

POLICY#: 3460 Reviewed/Approved Date: 11-12-14

PURPOSE: Establish Requirements for Use of 1099 Forms

Type: D

POLICY CONTENT:

When Immaculate Heart of Mary School pays more than $600 in a fiscal year to individuals or unincorporated independent contractors, such payments shall be reported to the IRS on form 1099.

Certified: _____ Date: 11/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: Parish Business Manager

POLICY#: 3470 Reviewed/Approved Date: 11-12-14

PURPOSE: Establish Guidelines for Collaboration between Principal and Pastor/Business Manager

Type: D

POLICY CONTENT:

Immaculate Heart of Mary School principal shall collaborate with the Pastor/Business Manager for the purpose of budget, financial reporting, internal controls, and fund raising.

Certified: _____ Date: 11/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal

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Board of Education Policy Manual

SUBJECT: Sales Tax

POLICY#: 3480 Reviewed/Approved Date: 11-12-14

PURPOSE: Provide Guidelines for Implementing Sales Tax

~~Type: D~~

POLICY CONTENT:

Immaculate Heart of Mary School, a 501(c)3 organization, qualifies as a sales tax exempt entity. The exemption for sales to schools "not for resale" and for the school's purchases "not for resale" are provided for in section 4 a (a) of the Sales Tax Act and section 4 (i) of the USE Tax Act. Purchases for personal consumption, such as catered meals, are not tax exempt. Sale of goods and services for personal use must include sales tax.

Certified: _____ Date: 11/12/15
BOE President

Approved: _____ Date: 12-17-14
Pastor

Acknowledged: _____ Date: 11-12-14
Principal