

Parish Financial Services Newsletter



Archdiocese of Seattle

Annual Catholic Appeal

As the 2010 Annual Catholic Appeal Campaign approaches, I am thankful to you for a record-breaking 2009 - raising over \$13 million!



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As you know, our team's responsibility is to share best practices from all parishes in order to help each parish develop a plan to exceed the goal assigned to your parish, thus securing a larger rebate. We offer this opportunity to share and learn, at an upcoming Leadership Session.

NEW TOPICS FOR THIS YEAR'S SESSION:

New Attendee/Envelope Processing – will begin ½ hour before the lunch is served (for all NEW attendees and those who would like a refresher on envelope processing)
Success Stories and Game Plan during changing economic times
Witness Speaker Resource and Checklist – new resource for parish use when choosing and meeting with a witness speaker
Solutions to common problems

Support of the parish leadership is very critical this year; therefore we encourage **ALL key leadership people to attend a leadership session**. Who are the key leadership?

Pastor
Parochial Vicars
Priests in residence who may celebrate Mass during the Appeal
Deacons
Pastoral Coordinators
Pastoral Assistants for Administration
ACA Team – staff and/or volunteers

Session Registration will be done through our website again this year. Each attendee can sign up for themselves or you can assign someone to register all those who will be coming from your parish.

SIGN UP NOW! REGISTER NOW at www.seattlearch.org/aca
(click on the link to the left side of the page that says 2010 Registration Form)
Please RSVP by February 9, 2010

The Appeal staff is looking forward to seeing you. **Together we are making a difference!**

Thank you for all you do to make this campaign so successful.

'Stewardship As A Way Of Life'

QUARTERLIES Now More Important Than Ever!



"In this time of great economic challenge, I can't emphasize enough the importance of sending out the Quarterly letter. The data consistently PROVES; parishes that send Quarterlies on a regular basis enjoy a much higher pledge fulfillment rate than those which do not.

Regardless of the economy, parishioners are eager to honor their pledges and to support what they are passionate about, including the financial stability of their parish.

Most of your colleagues will testify to the ease AND the benefits of sending the Quarterly letters. If you are worried about parishioner complaints, be assured that these are rare. The vast majority of parishioners appreciate updates of their pledge status, and it's easy to ensure everyone's awareness that a quarterly status report is NOT an invoice.

Other than having the weekly envelopes mailed automatically to your parishioners, there is nothing as easy and EFFECTIVE as the quarterlies to produce a HUGE FINANCIAL BOOST to your parish. We have the data to prove it! I urge you to PLEASE send out the quarterly letters."

Scott Bader
Director of Parish Stewardship

For further information, contact Scott Bader at scottb@seattlearch.org 206.903.4619 or 1.866.381.2033. Or Kathy Clark at Kathy.clark@seattlearch.org 206.382.4271 or 1.866.381.2033

Washington State Reseller Permit

Effective January 1, 2010, Washington State replaced resale certificates with reseller permits issued by the Department of Revenue. After discussions with the state, they advised us that we need to use **ONE** reseller permit for all of the organizations within the Corporation (the reseller permit is attached). Because it is in the name of the Archdiocese, parishes and schools must be diligent about the proper use of the permit.

Please remember that we are NOT exempt from paying sales tax. Certain fundraising activities however; are exempt from the sales tax. In these situations only, the reseller permit can be provided to the vendor to waive the sales tax. Examples of qualified fundraising purchases would be:

- Items purchased to auction off at a school auction
- Catered meals served at events where attendees must purchase a ticket to attend

Essentially anything purchased with the intent of reselling at a fundraiser would be exempt from sales tax. Items consumed at these events, such as flowers, decorations, plates, napkins, etc. are not exempt from sales tax.

We understand that we may run into problems with vendors who don't understand our corporate structure.

If you have any questions, please contact Nicole Beller for clarification or more information.



Safe Environment Updates

SAFE ENVIRONMENT RECORD KEEPING REMINDER

The Safe Environment Database (SETA Net) is a wonderful tool to help you track all three required elements of the Safe Environment Program. If used correctly, I can help you track background checks, abuse prevention policy acknowledgement and completed training that is required for employees and volunteers.



To make sure background check records are linked to your employee or volunteer's record, ***please be sure to include the individual's SETA Net Participant ID when submitting your background check.***

To track if an individual has signed-off on the abuse prevention policies, simply enter the date the policy is signed on the participant's profile. You will find a box for this information on the Basic Info page under "Application Info."

WANTED: GREAT IDEAS!

April is National Child Abuse Prevention Month. Each year the Safe Environment Program sends out packets of information to assist you during Child Abuse Prevention Month. This year's packet will be going out in March and we would like to include suggestions from you to be used in other parishes and schools. Does your parish or school do anything special to acknowledge Child Abuse Prevention Month? Are there any special events or activities planned? What does your parish or school do to increase awareness during this important time of year? Please send your ideas and suggestions to sep@seattlearch.org. Thanks for your help!

SAFE ENVIRONMENT PROGRAM DEADLINES

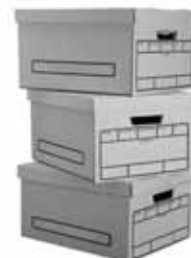
Spring is right around the corner which means so are the deadlines for the Safe Environment Program. Please remember that all parishes and schools must complete all Safe Environment requirements by May 31, 2010. If you have a substantial number of people in your community in need of training, please contact the Safe Environment Program to schedule a class. (206) 274-3188 or sep@seattlearch.org



Thank you to everyone who has already completed the Ordinary Income Survey. For those parishes that have not responded, we have attached a copy of the survey to this newsletter. We are looking for your total Ordinary Income which includes Sunday Envelopes, Sunday Loose, Holy Day Envelopes, Holy Day Loose and Children's Collection for July 1, 2008 through December 31, 2008 and July 1, 2009 through December 31, 2009. Thank you for completing the survey and we will share the results soon!

Record Retention Schedules

The Archdiocesan Records Manager will soon be starting the process of creating new records retention schedules for parishes and schools. We will only be able to visit a small sampling of parishes to survey records. To ensure that we get as complete a picture as possible of the kinds of records you are producing and keeping, it would be very helpful to hear from parish and school administrators any questions, comments, or concerns you may have about records that do not appear on the current retention schedule for parishes (found in Many Gifts, One Spirit).



We need your input! Please send comments to Seth Dalby at seth.dalby@seattlearch.org

Archdiocese of Seattle

Parish Financial Services

710 9th Avenue
Seattle, WA 98104

Phone: (800) 422-5417

Fax: (800) 382-4279

E-mail:

parishfinancialsvcs@seattlearch.org

Parish Financial Services assists Parishes and Faith Communities in maintaining financial stability through:

- *Supporting high quality financial, accounting, budgeting, and reporting systems.*
- *Ensuring financial viability through the continual encouragement of prudent fiscal management.*

Catholic Directory 2009-2010 Corrections

Page 18—Archives and Records

The correct e-mail address for Seth Dalby, Archivist/Records Manager is seth.dalby@seattlearch.org

Page 24—Parish Financial Services

The correct general office e-mail address is parishfinancialsvcs@seattlearch.org

Page 24—Parish Revolving Fund

The correct Fax number is (206) 382-4279

Annual Renewal of Tax Exempt Status

We have not yet received the 2010 forms from the State of Washington Department of Revenue for renewing the tax exempt status. The forms will eventually be forwarded. When you receive them, your prompt attention by completing, signing and returning the forms, along with any required information, to Property & Construction Services is appreciated.

Workers' Compensation Notice

As a reminder, please remember to provide the employee who will be filing a work-related injury claim with *A Guide to Industrial Insurance Benefits for Employees of Self-Insured Businesses* booklet along with the Worker's Compensation Filing Information including our third party administrator's information, CCMSI, 7900 E Greenlake Dr. N., Suite 208, Seattle, WA 98103. Should you need additional booklets, please fax your request to (206) 382-4372 or email to cristym@seattlearch.org.

Newsletter Attachments

Parish Financial Services

Washington State Resellers Permit

Fulcrum Foundation

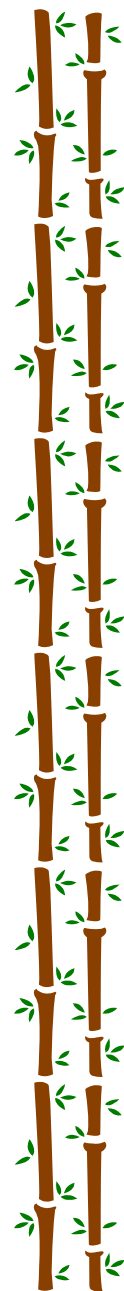
The Archbishop Alexander J. Brunett Endowment for Families in Special Need
Student Nomination Form For Academic Year 2010-2011.

Missions Office

Operation Rice Bowl materials Order Form

Administration and Finance

Ordinary Income Survey





STATE OF WASHINGTON

DEPARTMENT OF REVENUE

September 8, 2009

Your new reseller permit is enclosed

**New law:
SB 6173**

Resale certificates will be replaced by reseller permits issued by the Department of Revenue, effective January 1, 2010. Reseller permits allow businesses to make qualifying purchases for resale without paying sales tax.

**Using your
new permit**

Your business has qualified to receive a reseller permit. Unlike resale certificates, your reseller permit has a number and expiration date specific to your business.

To use your permit:

1. Make paper or electronic copies and give them to sellers you make purchases for resale from.
2. Keep the original until its expiration date (listed in the upper-right corner of the permit).

If your business closes, you are no longer allowed to use your reseller permit.

**If you accept
resale
certificates**

As of January 1, 2010, your customers who have used resale certificates need to provide you with a copy of their new reseller permit to continue to make wholesale purchases. If you sell to farmers, they may use a reseller permit or the *Farmers Certificate for Wholesale Purchases and Sales Tax Exemptions* for their wholesale purchases.

If your customer does not have a reseller permit, you need to charge sales tax. Your customer can then take a "tax paid at source" deduction on their excise tax return or request a refund from the Department.

For audit purposes, resale certificates, reseller permits, and farmers' tax exemption certificates must be kept on file for five years from the date last used.

**If you have
questions**

More information is available on our web site at dor.wa.gov/resellerpermit. If you have questions or need assistance, please call 1-800-647-7706.



STATE OF
WASHINGTON

RESELLER PERMIT

Washington State Department of Revenue

PO Box 47476 • Olympia, WA 98504-7476 • 1-800-647-7706

Issued to:

178 005 076

Corp Of Catholic Archbishop Of Seattle

710 9th Ave

Seattle WA 98104 2017

Permit Number: A00 0762 13

Effective Date: 01-01-2010

Expiration Date: 12-31-2013

Business Activity:

RELIGIOUS ORGANIZATIONS

This permit can be used to purchase:

- Merchandise and inventory for resale without intervening use
- Ingredients, components, or chemicals used in processing new articles of tangible personal property produced for sale
- Feed, seed, seedlings, fertilizer, and spray materials by a farmer
- Materials and contract labor for retail/wholesale construction
- Items for dual purposes (see Purchases for Dual Purposes on back)

This permit cannot be used to purchase:

- Items for personal or household use
- Items used in your business that are not resold, such as office supplies and equipment
- Promotional items or gifts
- Tools, equipment, or equipment rentals
- Materials and contract labor for public road construction or U.S. government contracting (see Definitions on back)
- Materials and contract labor for speculative building

The business named on this permit acknowledges:

- It is solely responsible for all purchases made under this permit
- Misuse of the permit:
 - Subjects the business to a penalty of 50 percent of the tax due, in addition to the tax, interest, and penalties imposed (RCW 82.32.291)
 - May result in this permit being revoked

Notes (optional): _____

Important: The Department of Revenue may use information from sellers to verify all purchases made with this permit were qualified.

Cindi Holmstrom

Director, Department of Revenue

Reseller: Keep this original permit on file. Provide copies to sellers from which you make purchases.



January 25, 2010

Dear Father/Pastoral Coordinator:

Through the leadership of Archbishop Brunett and the Fulcrum Foundation and thanks to the generosity of many donors, the *Archbishop Alexander J. Brunett Endowment for Families in Special Need* provides generous grants of tuition assistance to children in a number of Catholic schools throughout Western Washington. On behalf of Archbishop Brunett, I am writing at this time to ask that you nominate one child who would like to attend your parish school or local high school and whose family cannot afford tuition.

A small number of grants will be awarded this year to elementary and high school students: \$2,800 for an elementary school student and \$3,900 for a high school student. In particular, the Archbishop and his endowment committee are looking to fund students from families headed by a single parent and who will benefit academically and spiritually from the experience of attending a Catholic school. If the child continues to be eligible, tuition assistance will continue until he or she graduates from the school.

To nominate a student, fill out the attached nomination form and return to the Fulcrum Foundation. Please consult with your principal before making your nomination to ensure that the child meets the entrance requirements for the school and that there will be a place in the school at the child's grade level.

Please submit your nomination by **February 10th** (postmarked) by mailing the materials to Fulcrum Foundation, Attn: Teresa Dion, 710 Ninth Avenue, Seattle, 98104. If you have questions, feel free to contact the Foundation at (206) 748-7988.

Thank you for your assistance in this effort to serve our families who are most in need.

Best regards,

A handwritten signature in black ink, which appears to read "Joe Womac". The signature is fluid and cursive, with the first name "Joe" being more prominent than the last name "Womac".

Joe Womac
Executive Director



*The Archbishop Alexander J. Brunett Endowment
for Families in Special Need*

STUDENT NOMINATION FORM

For Academic Year 2010-2011

Thank you for your assistance in this effort to serve our families in need by offering them the gift of a Catholic education for their child. Below are the nomination requirements. **Please review the following to ensure that the student you select is eligible to receive this award.**

- This student is a practicing Catholic who belongs to a local parish
- The student belongs to a single-parent family
- The family is in considerable financial need that would require tuition assistance
- The student meets the school's entrance requirements

STUDENT/FAMILY INFORMATION

Student Name:		Current Grade:
School:	Principal:	
Parent Name:	Parish:	
Parent Address:		
City:	State:	Zip:

Please answer the following questions on a separate sheet of paper and attach it to this form. You may include any additional information that you believe would be relevant in considering this student's eligibility.

- A) Describe how this family's circumstances make them eligible to receive an award for "families in special need."
- B) What can you tell us about this family's financial need? Does the family's financial situation prevent them from considering a Catholic school education for their child?
- C) Where does this student currently attend school? How has he/she performed academically and what is his/her involvement in student life and extra-curricular activities?
- D) Is this student and his or her family active in the parish life? How would he/she benefit spiritually from the experience of attending Catholic school?
- E) If this student is not currently attending a Catholic school, are you aware that the family is committed to the values of a Catholic education and would desire the opportunity for their child?

Pastor's Signature: _____ Date: _____

Return this form by January 29, 2010 (postmarked) to:
Fulcrum Foundation
710 Ninth Avenue
Seattle, 98104

Operation Rice Bowl 2010:

Operation Rice Bowl is around the corner! A reminder, the individual donation envelope is no longer provided as an insert in the cardboard "Rice Bowl". Please work with the appropriate people in your community in deciding if an order for envelopes would be helpful to those donating during and/or at the end of Lent. You may place your order by mail, phone, e-mail or fax with the Missions Office. The envelopes are free to you. Please do not hesitate to contact the Missions Office with any questions!

Missions Office staff

missionsoffice@seattlearch.org

phone: (206) 382-4580; (800) 869-7028; fax: (206) 264-2084

www.seattlearch.org/missions

Yes, please send Rice Bowl donation envelopes to our parish/school address:

Parish/School: _____

Shipping address: _____

City: _____ **Zip code:** _____

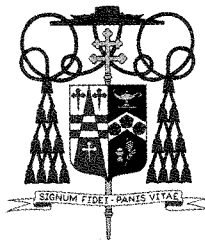
Number of envelopes requested: _____

Submitted by (name): _____

Parishes who have ordered Rice Bowl envelopes for 2010:

Assumption School, Bellingham: 300
Blessed Sacrament, Seattle: 500
Blessed Teresa of Calcutta, Woodinville: 100
Christ the King, Seattle: 500
Eastside Catholic Hispanic Ministry, Bothell: 25
Holy Cross, Tacoma: 350
Holy Disciples, Puyallup: 300
Holy Family, Kirkland: 800
Holy Rosary, Tacoma: 300
Holy Rosary, Edmonds: 200
Holy Spirit, Kent: 150
Holy Trinity, Bremerton: 500
Immaculate Conception, Seattle: 100
Immaculate Conception, Mount Vernon: 1000
Immaculate Heart of Mary, Kelso: 400
Our Lady of Fatima, Seattle: 500
Our Lady of Lourdes, Seattle: 50
Our Lady of Mount Virgin, Seattle: 75
Our Lady Queen of Heaven, Tacoma: 500
Prince of Peace, Belfair: 200
Sacred Heart, Lacey: 100
Sacred Heart, Bellevue: 200
St. Andrew Kim Community, Seattle: 600
St. Anne, Forks: 40
St. Benedict, Seattle: 350
St. Brendan, Bothell: 200
St. Cecilia, Stanwood: 250
St. Columban, Yelm: 50

St. Frances Cabrini, Lakewood: 2000
St. Hubert, Langley: 200
St. James Cathedral, Seattle: 1000
St. John the Evangelist, Seattle: 900
St. Joseph, Chehalis: 100
St. Joseph, Sequim: 100
St. Joseph, Seattle: 500
St. Joseph and Holy Family Mission, Pe Ell: 75
St. Joseph and St. John Mission, Elma: 200
St. Lawrence, Raymond: 50
St. Louise, Bellevue: 1000
St. Madeleine Sophie, Bellevue: 200
St. Mark, Shoreline: 1000
St. Mary Magdalene, Everett: 600
St. Mary, Centralia: 50
St. Mary, Seaview: 100
St. Mary Star of the Sea, Port Townsend: 400
St. Olaf and St. Peter Mission, Poulsbo: 450
St. Patrick, Seattle: 50
St. Paul, Seattle: 500
St. Peter Mission, Tenino: 50
St. Peter, Seattle: 100
St. Philip, Woodland: 100
St. Therese, Seattle: 300
St. Thomas More, Lynnwood: 100
St. Thomas, Tukwila: 100
Star of the Sea Mission, Stevenson: 25



OFFICE OF
ADMINISTRATION
AND FINANCE

January 12, 2010

Dear Father, Pastoral Life Director, Pastoral Coordinator:

As we continue to face economic challenges, Archbishop Brunett and Archdiocesan Finance Council are again asking your help in gathering collection information for the first half of this Fiscal Year and, for comparison purposes, last year.

Please complete the form on the lower portion of this page as soon as possible (but no later than January 31) and return it to Ed Williams, Director of Parish Financial Services. Ed's contact information is listed below.

Thank you for your prompt attention to this request.

Sincerely,

Patrick J. Sursely, Archbishop's Delegate
Administration and Finance

Return to: Ed Williams
Fax: 206-382-4279
E-Mail: edw@seattlearch.org
Mail: PFS, 710 9th Ave, Seattle, WA 98104

Parish Id: _____

Parish Name: _____

Parish Ordinary Income July 1 – December 31, 2009 _____

Parish Ordinary Income July 1 – December 31, 2008 _____

Please return by January 31, 2010. Thank you for your cooperation.