

Parish Financial Services Newsletter

Special points of interest:

- Please see the attached testimonial information for Priests and Deacons. This information was sent out to Priests last week. If you have any questions, please contact the Vicar for Clergy Office.

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Parish Annual Report—Financial Section Changes

Those of you who have been eager to get a jump start on the Parish Annual Report this year may have noticed that Financial Section was a little shorter than usual. We made two major changes to the financial section this year:

Section III-A - Financial

You will all be happy to know that we've eliminated 10 pages of the Financial Section! When you open the Excel Spreadsheet you'll notice that there are no longer tabs for Program 10, 70 & 80, 95 etc. They have been replaced with one tab called "Summary of Operations." Instead of giving the detailed income and expense information for each program, you just need to summarize that information into the general categories provided. Since this is the 3rd or 4th year we've required the financial statements to be sent along with the report, we realized we don't need that level of detail in both places. Please remember to submit a copy of your Financial Statements, including the Balance Sheet and Income Statements for all programs with your report. The Income Statements for each program should be consolidated as follows:

10—Parish Operations (includes programs 10-69)

70—Religious Education (includes programs 70-79)

80—School (includes programs 80-89)

95—Cemetery

Section III-C - Building Project Forecast

We've also eliminated the majority of this section as it often led to confusion and sometimes caused delays. We ask that you briefly describe any projects you are planning in the near future with an estimated cost over \$25,000.

If you have any questions about the Section III of the Parish Annual Report please do not hesitate to contact Nicole at (206) 382-4573 or nicole.wright@seattlearch.org



Don't Forget, the Parish Annual Report must be postmarked by August 12, 2011!

Download the report now at:

<http://www.seattlearchdiocese.org/Archives/PAR.aspx>.

Parish Financial Operation Reviews

We are currently in the process of scheduling Parish Financial Operations Reviews at many locations. We are currently operating on a 3 year review cycle so if you have not had a review in the last 3 years you may have received a letter from Ed with a questionnaire. If you have not completed the questionnaire, we ask that you complete it as soon as possible and return it to PFS. Once we have received the questionnaire we will send out an introductory e-mail notifying you who will be conducting the review. The scheduling is worked out between the reviewer and the parish.



The reviewer will contact you, and once the review is scheduled, will provide you with a list of documents they will need to have access to while they are on-site. Please have this information available as it will speed up the process tremendously. The scope of the reviews this year has been modified to include auxiliary organizations including but not limited to: Parents' Clubs, Auctions, Scrip, etc. Records for these groups must be on-site and made available to the reviewer. It's a good idea to have a member of the group available for questions in person or via phone on the day of review.

Please be aware that depending on the size of your parish and/or school, the reviewer may need more than one day to complete the review. Accessibility to the requested information is extremely important! These are not audits! You aren't going to get in trouble if the reviewer finds something wrong (assuming it's nothing illegal!). The Pastor/Pastoral Coordinator will receive a letter outlining the areas of concern with suggestions for improvements. If you have any questions or concerns about the review process, please contact Ed or Nicole.

ATTENTION!!!

As we get into the summer maintenance season, just a reminder that it is a good idea to make sure your contractors have valid licenses and are registered with the State L&I for Workers Comp coverage.



Employee Terminations

REMINDER: If your parish or school is considering terminating an employee for cause, eliminating a position, conducting a reduction in force, reducing hours or implementing any other cost-cutting measure, it is essential that you contact the Human Resources Office for guidance. Please remember - in order for a parish or school to have Catholic Mutual protection, pastors, principals and other supervisors must follow the advice of the Human Resources Office in all involuntary terminations **including layoffs**. For matters involving parish employees please contact Denise Aubuchon (206) 382-4522 or Matt Boswell (206) 264-2083. For guidance regarding school employees please contact Karen Tarabochia (206) 382-4861.

ADP PC Payroll Upgrade/PDS Conflicts

Some parishes have been experiencing problems with PDS after upgrading the ADP PC Payroll Software. Bryan Gummersall is aware of the problem and has developed a fix. If you experience the problem, please contact him directly at 206-255-5074 or bryan@ptechs.com.



June 10, 2011

Dear Father:

When submitting a request for permission for a visiting priest or deacon, attached for your future use is a revised form, ***Request for Testimonial for Guest Priest or Deacon.***

This form must be submitted to our office for any clergy from another archdiocese, diocese or religious order visiting your parish or faith community, who will be engaged in any public ministry. It looks similar to the old form, with one exception: the new form contains a new section entitled "Explanation of Ministry/Reason for Visit" which is now required. A clearly stated reason for the ministry is all that is needed to complete this section (i.e. "Weekend Mass supply due to pastor's vacation"; "To celebrate a wedding Mass for N. and N."; "Preaching an Advent parish mission" etc.). If this section is left blank, it will be returned to you for completion. This will better assist the Archbishop in reviewing the requests as they come across his desk and it will allow us to keep an accurate record of the purpose of the clergy's visit.

I ask that you begin using this new form at this time. If you have any questions, please give Jan Augustavo a call at 206-382-4839. Thank you for your cooperation!

In Christ the Lord,

Very Rev. David Mulholland, J.D.
Vicar for Clergy

RETURN TO:

ARCHDIOCESE OF SEATTLE

Office of the Vicar for Clergy

710 9th Avenue, Seattle, WA 98104

Phone: 206-382-4839 Fax: 206-654-4654

e-mail: jana@seattlearch.org



REQUEST FOR TESTIMONIAL FOR GUEST PRIEST OR DEACON

Name of Visiting Priest or Deacon: _____

Visiting Priest or Deacon's Bishop/Provincial Contact Information:

Name: _____

Title: _____

Diocese/Religious Institute: _____

Address: _____

City, State, Zip _____

Telephone Number _____ Fax Number: _____

Dates of Visit: _____

Explanation of Ministry/Reason for Visit (REQUIRED):

Visit includes:

☐ **Sacramental Ministry**
(If yes, check applicable boxes)

- ☐ Celebrate Mass
- ☐ Con-celebrate Mass
- ☐ Confessions
- ☐ Preaching
- ☐ Celebrate Wedding Mass
- ☐ Witness Wedding
- ☐ Celebrate Baptism
- ☐ Celebrate Funeral Mass
- ☐ Other (describe):

and/or

☐ **Guest Speaker**
(If yes, describe subject matter above)

Parish to Visit: _____

Address: _____

City, State, Zip code: _____

Delegating/Permitting Priest Signature: _____

Form Completed by: _____ Telephone No: _____