

Parish Financial Services Newsletter

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Farewell and Thank You Joan!

With mixed feelings I have to announce that Joan Tapia-Beeman who has been PRF Operations Manager for many years has resigned to become Assistant Director of Finance at J. F. Kennedy Catholic High School in Burien. Joan has managed our internal savings and loan operation of the Archdiocese during the biggest building boom in the history of the Archdiocese and has supervised the two funds that total over \$100 million with over 800 savings accounts and nearly 200 loans. Joan is very well regarded by parish staff throughout the Archdiocese as a valuable resource not only for PRF questions but also general parish accounting information. We certainly will miss her in PFS but the new position is a great opportunity both personally and professionally for Joan.



Joan will be staying until July 31 to get through year-end and start preparations for the audit. Please join us in wishing Joan the best as she starts this new phase of her professional life.

Ed Williams

Important Notes from PFS

2012/2013 Insurance Billing

The insurance billing for next year was mailed last week. Please check the billing thoroughly for accuracy and if you have any questions/concerns please contact Emily Lee at (206) 382-7316 or emily.lee@seattlearch.org. Remember, if you pay in full by July 25th you receive a 5% discount, or if paid by August 25th you receive a 2% discount. Beginning October 1st, finance charges of 1% per month on the unpaid balance will be charged.

Annual Signing Authority Forms

Archdiocesan Policy requires annual reporting of your delegation of authority to sign PRF transactions, insurance transactions, etc., or of your decision not to delegate this authority. Please note that you should return the Signing Authority Form even if you are not delegating this authority so we have a sample of your signature on file. Please see the attached form or you can download the form at: <http://www.seattlearchdiocese.org/Archdiocese/PFS/Forms.aspx>.





2012 Annual Catholic Appeal

Annual Catholic Appeal Update -

The Annual Appeal office will continue to send a campaign status report and a detailed donor report on a weekly basis until mid-July. Thereafter, we'll send the campaign status report monthly and the individual detailed donor report will be sent to you by request only at any time. Email your requests to aca@seattlearch.org or call us at 206-382-4274 or 800-809-4921. Thank you!

Reminders –

- New pledges/payments are still coming in – be sure to process these as they come in and send to us with your summary report on a weekly basis to our office. Please do not hold for any length of time. Checks need to be cashed, credit cards and EFT's need to be set up when donors have requested, and we need to thank the donors in a timely manner.
- Continue to send discrepancies or omissions you find on your donor report – send an email to maggies@seattlearch.org and include donor name, Arch ID# if known and description for research.

From the Missions Office

The Missions Office would like to thank parishes and faith communities for your generous participation during the 2011-2012 Archdiocesan fiscal year in the following:

Build Hope Collection (*down 3% from the previous year*)

World Mission Sunday Collection (*up 3% from the previous year*)

Catholic Relief Services Collection (*the 2012 collection is up 5% from the 2010* collection*)

Rice Bowl Lenten Program offering (*donations to date are up 3% from the previous year*)

Mission Cooperation Plan appeals (*each summer in about one-half of our parishes; donations have gone up three years in a row*)

If any reader of the PFS newsletter (e.g. for use with parish councils/finance councils) would like to receive a chart of their parish's five-year giving history for the above collections and offerings, please contact us: mission-soffice@seattlearch.org; (206) 382-4580

THANK YOU!! from your Missions Office
Erin Getchman, Kelly Hickman, J.L. Drouhard
www.seattlearchdiocese.org/missions

**2011 was a bit of an anomaly due to it being combined with the response to the Japan quake/tsunami*





Parish Stewardship

Archdiocese of the Military Service Collection SUPPORT OUR MILITARY!

The Archdiocese for the Military Services (AMS) provides for the pastoral care of Catholics in the armed forces, military academies, VA Medical Centers and overseas government civilian posts, as well as their families - a total of 1.5 million Catholics worldwide. The AMS depends on dioceses across the nation to take turns raising funds for this collection. This is the first time our archdiocese is sharing in this responsibility. AMS sent complete collection information packets to our parishes earlier this month.

THREE EASY STEPS

Step 1: June 30th - July 1st

Insert the AMS publication in your bulletins and make a pulpit announcement. *The bulletin inserts have been sent directly to your parish from the Archdiocese for the Military Services.*

Step 2: July 7th - 8th

Place the AMS publication in the pews, make a pulpit announcement and take a special collection at all Masses.

Step 3: July 14th - 15th

Insert the bulletin announcement thanking parish participants.

Click here for more information regarding the [Archdiocese for the Military Services](#).

For additional questions, including post collection information, contact Scott Bader at (206) 903-4619 or (866) 381-2033 or ParishStewardship@Seattlearch.org

Effective July 1st, 2012, the standard mileage reimbursement rate will increase to \$.55½ per mile.



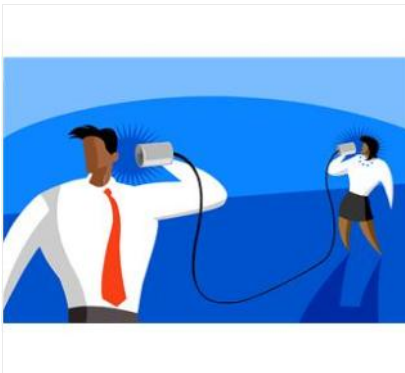
Pension Contributions for Women and Men Religious (Non-Ordained)

Effective July 1, 2012, parishes and schools are required to make a pension contribution for eligible employees who are religious (non-ordained) men and women. The pension payment should go directly to the religious institute. The pension amount is the same as for lay employees – 6% of the annual salary. Please contact the Human Resources Office if you have any questions regarding this.

ARCHDIOCESE OF SEATTLE

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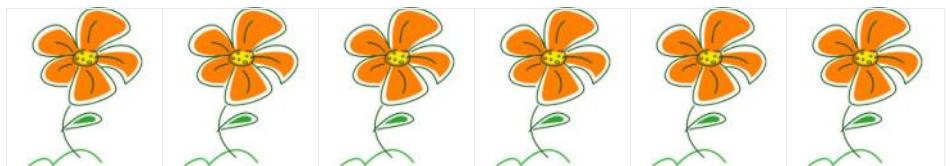
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Parish Financial Services assists Parishes and Faith Communities in maintaining financial stability through:

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



Parish Financial Operations Reviews

We are currently in the process of scheduling Parish Financial Operations Reviews at many locations. We are 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 includes 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.

**ARCHDIOCESE OF SEATTLE
ANNUAL SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

Note: Please complete either Section A or B.

**SECTION A
AUTHORIZED SIGNATURE**

I am not delegating signing authority at this time:

(Please Print your Name)

Signature

Date

**SECTION B
NOTICE OF DELEGATION OF SIGNING AUTHORITY**

I have authorized the following staff member(s*) to sign for the parish:

(Print or Type Name & Title)

(Signature of Appointee)

(Print or Type Name & Title)

(Signature of Appointee)

This authorization includes PRF savings and loan withdrawals, Archdiocesan insurance transactions (adding or deleting properties or vehicles), leases involving parish owned properties, and all contracts with the following exceptions and/or restrictions: _____

*If more than one signer is appointed, please indicate the number of signers required for transactions (ie. 1 or 2).

This authorization is valid until further notice.

(Signature)

(Date)

Chancery Approval:

(Signature)

(Date)

**ARCHDIOCESE OF SEATTLE
TEMPORARY TRANSFER OF SIGNING AUTHORITY**

Date: _____

Parish Name: _____ City: _____ ID# _____

During my absence from the Parish, I have authorized*:

(Print or type Name and Title)

(Signature of Appointee)

(Print or type Name and Title)

(Signature of Appointee)

(Print or type Name and Title)

(Signature of Appointee)

*If more than one signer is appointed, please indicate the number of signers required for transactions (ie. 1, 2 or 3).

This authorization includes PRF savings and loan withdrawals, Archdiocesan insurance transactions (adding or deleting properties or vehicles), leases involving parish owned properties, and all contracts with the following exceptions and/or restrictions: _____

This authorization is valid from _____ to _____
(beginning date) (ending date)

(Signature)

(Date)

Chancery Approval:

(Signature)

(Date)