

# PARISH FINANCIAL SERVICES

Archdiocese of Seattle November 2017

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# Welcome Arlene Stace to Parish Financial Services

Arlene is the new PRF Accountant. Arlene has worked for the Archdiocese of Seattle for 15 years in the Accounting department in various capacities. Her last position was fund raising Accountant. She joined PRF on November 6, 2017 and has been a tremendous help already. We are so excited to have Arlene join us in Parish financial Services and look forward to working with her in the future. Please feel free to call or stop by to welcome Arlene.

## PAA Days 2018 is coming soon.

Make sure you have blocked off on your calendar March 14 and March 15 for PAA Days 2018! At the suggestion of our planning committee, we are bringing back our well received 2016 speaker, Ann Garrido. Her topic this time will be 'Redeeming Conflict'. Registration will open in January.

# **New PAA Training**

We are in the process of planning another round of new PAA training for Wednesdays starting January 17 through February 7. If you know of someone in your parish staff or even a parishioner who might make a good PAA someday, they are certainly welcome to join us for this training.



### **Tax Fraud Communication**

We have learned that six individuals have been charged in the 2013 tax fraud scheme that affected some employees and volunteers of the Archdiocese. Five of these individuals have been convicted on multiple counts of mail and wire fraud and related charges. Two have been sentenced to federal prison (a 6 year and a 9 year term). The other three are awaiting sentencing. Although these convictions do not change the fact that many of our employees and volunteers experienced stress and a tremendous amount of inconvenience, it is reassuring to know that at least some of the individuals responsible are being held accountable for their crimes. We have been told that the large number of employees and volunteers who attended regional gatherings and signed affidavits for the IRS agents was helpful to their investigation.

I located an article on this topic from last May in the event you are interested:

http://www.oregonlive.com/pacific-northwest-news/index.ssf/2016/02/40500\_oregonians\_hit\_by\_25\_mil.html

Dennis O'Leary
Executive Director of the Chancery

### \*Look Out for Fraudulent Emails\*

We've had parishes receive emails cleverly appearing to come from the pastor to the bookkeeper, along the following lines:

"Hello \_\_\_\_\_\_, How are you doing today? I have an important wire I want you carry out before the wire deadline for the day. Let me know the details you would need to process the wire transfer. Thank You, Fr. \_\_\_\_\_."

Frank Feeman, our CFO, reminds us that Archdiocesan policy absolutely prohibits wire transfers to be authorized without personal contact. Please share this with anyone in your parish office that might be able to set up wire transfers for the parish. Thanks to everyone who is being so vigilant and on the lookout for all the scams that are out there.

# **Keep your Parish Property Secure:**

For many unfortunate reasons in our society today, parishes have become rightly concerned as to whether they are taking adequate steps to keep people and property secure when they are on church property. Church of the Assumption in Bellingham has taken key steps to do this. They took a look at the material in an earlier PFS newsletter about Active Shooters (see flyer attached).

The parish office reached out to their local police department and did a walk-through of parish property with them to identify what could be better done in regards to emergency preparedness. Their recommendations included environmental changes such as trimming bushes, control of ingress & egress, floor plans available at all doors for first responders, and first aid training for key people. The PAA found the walk-through of the facility to be very helpful. Call your local police precinct. Depending on the City/County, this service, may or may not, be available.

Responding to the materials in the PFS newsletter, the parish is developing a plan of action as to what to do in a crisis on church property. Recognizing that they might be the first folks called to respond in several scenarios, the parish is considering new requirements and additional training for parish ushers. We all pray that nothing happens that threatens security on church property, but good stewardship of our resources means we should do our best to plan to minimize and deal with any incidents. Your parish is encouraged to plan and prepare as well.

## **Setting the Housing Allowance**

Parish Finance Councils need to annually designate the value of parish owned housing for their priest(s).

To do this, the PAA, on behalf of the Finance Council,

- A. may wish to ask a real estate agent or a rental agent to give them an estimate as to the fair rental value of equivalent space elsewhere in the neighboring community. Obviously, you only want to have them do this comparing the space the priest actually uses for 'living space'. So any space used for rectory offices (not a home office), or meeting space that is never used by the priest for his personal activities, or other spaces not used by the priest, can be excluded from the value. OR
- B. Another, and probably easier, method is to use one several indexes to set the value: <a href="http://livingwage.mit.edu/states/53">http://livingwage.mit.edu/states/53</a> and/or <a href="https://www.irs.gov/businesses/small-businesses-self-employed/local-standards-housing-and-utilities">https://www.irs.gov/businesses/small-businesses-self-employed/local-standards-housing-and-utilities</a>

Additionally, for priests that have housekeepers paid by the parish/use housekeeping services paid by the parish, the value of those housekeeping services need to be added to the fair rental value to get the total housing allowance.

After obtaining that value, the Finance Council can vote to approve this amount as the housing allowance. (This must happen before the beginning of the calendar year.)

Then a letter should be given to the priest with that value included, to wit:

"This letter is your record of the total amount of housing allowance payment paid to/for you during 201X. Housing allowance payments are not subject to Federal Income Tax. However, you must include these housing allowance payments in the computation of self-employment tax. 201X Total Housing Allowance: \$\_\_\_\_\_." The chair of the Finance council should sign this letter.

Questions? Contact Scott Bader in the PFS office.

## **Department of Property & Construction**

Updated New Employee Safety Orientation Form

Please update your Safety and Accident Prevention Program binder with the new Appendix D-13 found under "Safety Manual" in the Property & Construction section of the website. Once you find the update on the website print it out and replace the one currently in your binder.

http://www.seattlearchdiocese.org/Archdiocese/Property/Manual.aspx

This updated form should be used for all new employees. The training should be completed, the form signed and placed in the employees' personnel file. It was revised to clarify employee safety training requirements for the Washington State L & I Department. Should you have any questions please feel free to contact Robin Marshall, Safety Coordinator at Robin.Marshall@seattlearch.org.

# **Property & Construction**

As the holidays approach, families gather, delicious food created and decorations are displayed. Now is a great time to test your smoke alarms.

A recall has been posted for Kiddie Fire Extinguishers. Click on the link below and follow the directions to verify if yours are not on the list. Even if yours are not on the list, it is a good idea to check the expiration dates, signage and ease of retrieving the ones you currently have.

https://www.cpsc.gov/Recalls/2017/kidde-recalls-fire-extinguishers-with-plastic-handles-due-to-failure-to-discharge-and#

### Finance Council Chair Email Newsletter starts soon

In the next few days, using information from the parish annual report, we will be sending the following to your finance council chairs – and in the future will send the 'Finance Council Quarterly' article directly to them (and continue to include it in the PFS newsletter as well). We consider our parish finance councils as important partners in ensuring good financial procedures in our parish, thus this direct communication.

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Welcome to the Finance Council Quarterly email from the Archdiocese of Seattle. This information is designed to help Finance Councils do a better job of providing consultative advice to their pastors for their parishes. Each season we will highlight best practices for parish finance councils.

- -This email is sent to parish finance council chairpersons.
- -If you are not the finance council chairperson any longer, please let us know. parishfinancialsvcs@seattlearch.org
- -Feel free to forward this to others on your parish finance council.

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# Finance Council Quarterly Email:

- -The Archdiocese of Seattle has a Parish Accounting Manual which provides rules for parish financial procedures, particularly in Section A. You can find the most up-to-date version here:

  http://www.seattlearchdiocese.org/Archdiocese/PFS/PFSManual.aspx
- -Ethicspoint is the entity the Archdiocese uses as a hotline to allow staff and lay leaders to report concerns regarding ethical or procedural concerns in their parish operations. You can find the link for it at: <a href="http://www.seattlearchdiocese.org/Directory/OfficeDetail.aspx?ID=88">http://www.seattlearchdiocese.org/Directory/OfficeDetail.aspx?ID=88</a>. Hopefully you have seen posters and brochures in your parish. If not, you can contact the Parish Financial Services office.
- -There are three ten minute videos for New Finance Council members on the Parish Financial Services website. You can find the videos (and handouts to go out with those videos as well as other resources) here: http://www.seattlearchdiocese.org/Archdiocese/PFS/Forms.aspx.

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November 16, 2017

My dear Brothers and Sisters in Christ,

It is with great joy that I announce that Joseph C. Schick has accepted my invitation to serve as the Archdiocese of Seattle's Chief Financial Officer upon Frank Feeman's retirement in 2018. Joe was selected following a thorough search process facilitated by Bishop Mueggenborg and assisted by a committee that included members of the Archdiocesan Finance Council and a pastor. I also conducted a lengthy personal interview with him and received input from the Archdiocesan Finance Council and College of Consultors. Joe has an extensive record of accomplishments with public, private and non-profit organizations in areas of strategic planning, financial planning and analysis, accounting, tax, treasury, financial systems, internal and external audits, real estate, insurance and governance. Joe is a CPA and has over 10 years of experience as a CPO.

Joe is a member of St. Teresa of Calcutta Parish and has served on its finance council since the parish was founded more than a decade ago. He is also the longest-tenured member of the archdiocesan Parish Revolving Fund (PRF) board. Joe is a deeply committed and faith-filled Catholic, and I have great confidence that the Lord has sent us the right person. He will begin working with Frank Feeman in early 2018, so that there will be a helpful transition period. I invite you to join me in welcoming him to this important position.

I would like to take this opportunity to thank Frank for his generous and dedicated service and for all he has done during his 6 years as CFO. He has been a great blessing to us, and I am personally grateful for his unflappable and gracious manner, his keen understanding of parish life, his problem-solving abilities, and his demonstrable love of the Church.

Sincerely in Christ,

+ Steth Sartain

J. Peter Sartain Archbishop of Seattle

# A Parish Stewardship Message:

In the spirit of St. Paul to the Corinthians, may we always be thankful to the generous parishioners in the Archdiocese of Seattle for their pledges to Parish Stewardship. May their donations be used in grace & charity for the glory of God. Amen

For it is all for your sake, so that as grace extends to more and more people it may increase thanksgiving, to the glory of God. 2 Corinthians 4:15



# **Employment Opportunity at St. Hubert Church**

Our small, vibrant parish seeks a cheerful, conscientious, and detail-oriented professional to serve as Office Manager. It's a combination of supporting ministries and coordinating wonderful volunteers. The ideal candidate will be flexible, excited about learning, and committed to healthy, servant leadership. Whidbey Island is beautiful and inviting. Please see the website (<a href="www.sthubertchurch.org">www.sthubertchurch.org</a>) for complete job description and information about applying. For more information, please contact Elizabeth (<a href="mailto:Elizabeth@sthubertchurch.org">Elizabeth@sthubertchurch.org</a> or 360-221-5383).



Please remind bookkeepers to always attach a copy of an invoice or statement to any check sent in to CCAS or Archdiocese of Seattle Accounting Department to ensure that the check is sent to the correct person.

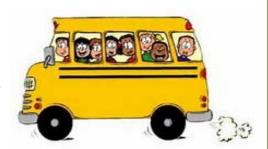
Also, please do not combine payments on checks unless instructed to do so.. Not all payments go to the same department. Thank you.

## Bus available

2008 Bluebird Vision. Seats- 65 children/ 43 adults. It has 75,000 miles. It has a new battery and fuel tank. It's in good condition. Pictures available upon request.

Please let me know if you are interested. All reasonable offers will be considered.

David Whitesell Parish Administrator St. Frances Cabrini parish





# **Matching Gifts**

Encourage Matching Gifts on a monthly basis in your bulletin, on your website, Facebook, mobile App or email alerts to parishioners. This will help maximize your rebate for your parish project! To have sample messaging sent to you electronically, please request it from Maggie Stiles at maggies@seattlearch.org

# The 2018 Campaign Dates are set - Mark Your Calendar!

Appeal Kickoff Weekend April 22, 2018
Presentation/Ask Weekend 1 April 29, 2018
Presentation/Ask Weekend 2 May 6, 2018
Follow-Up/Ask Weekend 1 May 13, 2018
Follow-Up/Ask Weekend 2 May 20, 2018

**Have you taken our survey yet?** Our office has come up with some **new** ideas this year for our leadership sessions and your assistance will help us make a decision. Here's the link to the very brief survey – thank you! <a href="https://www.surveymonkey.com/r/aca2018">https://www.surveymonkey.com/r/aca2018</a>

### WASHINGTON SAFE AND SICK LEAVE TO TAKE EFFECT JANUARY 1, 2018

Although you don't need to take any action now, we wanted to make you aware of this new law that will impact all employers that have employees located in Washington. Several Washington cities – Seattle, SeaTac, Tacoma and Spokane – already have mandatory safe and sick leave laws in place, but in November 2016 the voters in Washington passed Initiative 1433 that will make this mandatory leave state-wide effective January 1, 2018. We are still waiting to see how this new State law will integrate with current City laws. See the attached state poster.

All employees of the Archdiocese of Seattle that work less than 20 hours per week will begin to accrue sick leave at a rate of one (1) hour for each 40 hours worked and overtime hours are counted toward paid leave accrual. Full time employees or part time employees already working at or over 20 hours per week would be eligible for our Archdiocesan Sick Leave – so this really only impacts all other employees working less than 20, including temporary employees that will work 90 or more calendar days. Leave accrual begins on the first day of employment after January 1, 2018, but the employer can restrict usage of the leave until the 90<sup>th</sup> calendar day after the start of the accrual.

Payroll Services will provide more information about this change to our Sick Paid Time Off (PTO) accrual plans and communicate any specific action you will need to take to ensure those employees at your location are in the correct Sick Leave plan. If you have any questions about the new law, please contact Human Resources at (206) 382-4570 or HR@seattlearch.org.

# MINIMUM WAGE INCREASES EFFECTIVE JANUARY 1, 2018

Seattle Minimum Wage: \$15.00/hour for all employees working in the City of Seattle.

Tacoma Minimum Wage: \$12.00/hour for all employees working in the City of Tacoma.

Washington State Minimum Wage: \$11.50/hour for all employees working in the State of Washington.

# Thank you!



Catholic Relief Services distributed emergency shelter materials to earthquake-affected communities in the Isthmus of Tehuantepec region of Mexico after a quake on September 7, 2017 devastated many communities in the area. CRS Program Quality Coordinator, Nicole Kast registers Rogelio Pineda Noriega, 71, for an emergency shelter tarp in front of what is left of his house after the earthquake in the small town of Huamuchil, Oaxaca, Mexico.

We are so grateful for our wonderful parish staff and volunteers, who work tirelessly to bring the good news to the ends of the Earth from the people of western Washington.

Just a gentle reminder that our accounting year-end is December 15, so if you have any funds to send in for the following collections, please send in to the Missions Office:

- Catholic Relief Services Collection
- \* CRS Rice Bowl
- Holy Land/Good Friday Collection
- \* Catholic Campaign for Human Development Collection
- World Mission Sunday Collection
- \* Overseas emergencies, such as Mexico quake or hurricanes in the Caribbean (Note: hurricane relief efforts in Texas, Florida and Puerto Rico donations go to the archdiocese's Accounting Office)

Thanks again,

Your Missions Office



There is a critically high number of foster children in Washington State, and that number continues to rise. Please come learn about how you can get involved in volunteer opportunities, providing temporary care.

# PRESENTERS INCLUDE:

Current Foster Parents & Catholic Community Services social workers

# NOVEMBER 30, 2017

6: 30 TO 8: 30PM // ST. JOHN BOSCO 10508 112TH ST SW, LAKEWOOD, WA 98498

SPONSORED BY THE ARCHDIOCESE OF SEATTLE - OFFICE OF DISCIPLESHIP, ST. JOHN BOSCO PARISH - LAKEWOOD, AND CATHOLIC COMMUNITY SERVICES



# 1<sup>st</sup> Annual Peacemaking Summit

# You're Invited! Friday, January 26, 2018 6:00PM-9:00PM

Student Center, Room 160: LeRoux Banquet Room, Seattle University



A CELEBRATION AND ACKNOWLEDGEMENT OF THE POWER OF PARTNERSHIPS RELATING TO THE PEACEMAKING CIRCLES MOVEMENT IN KING COUNTY.

# Keynote Speaker: Dan Satterberg, King County Prosecuting Attorney

REFRESHMENTS AND HORS D"OEUVRE WILL BE SERVED.

Organized by the King County
Peacemaking Coordinating Team &
Seattle University

Please register for tickets in advance at: Peacemaking-Summit.eventbrite.com

Donations will be warmly accepted at the Summit. Please make your tax-deductible donation to CCGS, PO BOX 18467, Seattle, WA 98118. On the memo line, notate Peacemaking. Thank you notes and receipts will be mailed to you for tax purposes.

# NUESTRA SEÑORA DE GUADALUPE

OUR LADY OF GUADALUPE

# MADRE DE LAS AMÉRICAS

MOTHER OF THE AMERICAS

# Vigésimo Tercer Aniversario 23RD ANNIVERSARY

9:30 AM - Rosario / Rosary at St. Mary, Seattle

10:30 AM - Procesión / Procession from St. Mary, Seattle

12:10 PM - Misa / Mass at St. James Cathedral, Seattle CON EL EXMO. J. PETER SARTAIN, EL EXMO. EUSEBIO ELIZONDO, Y EL EXMO. DANIEL MUEGGENBORG

1:30 PM - Recepción / Reception at St. James Cathedral, Seattle

# Sábado 2 de Diciembre de 2017

SATURDAY, DECEMBER 2, 2017



Para mayor información, comuníquese con / For more information, contact ANNIE BAILEY - Tel: 206-274-3194 / Email: ana.bailey@seattlearch.org

Iglesia de Sta. María / St. Mary Church - 611 20th Ave S, Seattle 98144 Catedral de St. James / St. James Cathedral - 804 9th Ave, Seattle 98104



SeattleArchdiocese.org/STJ







DECEMBER 1-3

"Ignatian Prayer:
Friendship with Jesus"
Fr. John Fuchs, SJ &
Deacon Jim Fish



DECEMBER 8-10

"Resurrecting

Woman"

Camille Pauley

Register at PalisadesRetreatCenter.Org

# A Minute for Safety

# Volume 7 • Number 1

Arthur J. Gallagher & Co. Commercial Lines

A Minute for Safety is published by Arthur J. Gallagher & Co., in Itasca, Illinois. The information contained in this newsletter was obtained from sources that to the best of the writers' knowledge are authentic and reliable.

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### **ACTIVE SHOOTER PREPAREDNESS**

The potential for a shooting incident by an active shooter\* exists, unfortunately, in every workplace throughout the United States. While the regulation of firearms has been enhanced in recent years, firearms are able to be acquired with relative ease. Mass shooting incidents usually involve firearms and randomly selected targets or victims. Active shooter events usually last less than 15 minutes, sometimes before law enforcement arrives. It is important to prepare for such an event, and to be ready to respond if the unthinkable happens.

It is difficult to predict who could become an active shooter. An active shooter may be a current or former worker, a family member or friend of coworkers, someone who has a beef with your business, or a complete stranger. While it is difficult to predict a person's actions, there are some behaviors that may indicate a person may be planning a shooting incident. Report any of the following observations or uneasy, "gut" feelings to your supervisor, management, and/or human resources:

- Increased use of alcohol, drugs, and absenteeism.
- Decreased hygiene and appearance.
- Depression and/or social withdrawal.
- Disregard for work quality or company policy.
- Mood swings and overly emotional responses.
- Paranoid, suicidal, or doomsday behavior or discussions.
- Increased discussion of violent incidents and weapons/firearms.

## **BE PREPARED**

Now is the time to create an emergency action plan to respond to an active shooter situation.

- Gather the contact names and phone numbers of emergency responders, hospital, management, and building personnel.
- Discuss how to alert employees about an incident. Will you use a code word over the public address system, an all-call phone alert, text messages.
- Obtain supplies such as, first aid kits, flashlights and communication devices.



### Once you have response procedures in place:

- Create a written plan and distribute to employees with responsibility for emergency management.
- Train employees on the plan and how to react when gunshots are heard.
- Conduct random emergency drills based on an active shooter scenario.

Evaluate the effectiveness of the drill and adjust your plans and training as needed.

# A Minute for Safety

# WHAT TO DO IN AN ACTIVE SHOOTER SITUATION

In the event your workplace becomes the target of an active shooter, the best choice you can make is to evacuate the active shooter area, if possible. For evacuations:

- Always know two exits and escape routes in your workplace and every building you visit.
- Guide others to the escape route and prevent them from entering the shooting zone.
- Exit whether others follow you or not.
- Leave all personal items behind, but take your cell phone if possible.
- Keep your hands visible at all times and follow police instructions.

### If you can't escape an active shooter scenario, find a place to hide out:

- Find an office with a door that you can lock and/or barricade.
- Stay out of sight of windows, if possible, close the blinds and turn off the lights.
- Silence your cell phone, turn off computers and any other electronic device.
- Stay quiet.
- If it is safe to do so, report the incident to first responders, don't assume someone else has reported the incident.

If you are unable to evacuate or hide, call 911 and talk to the dispatcher or leave the phone line open so they can listen and record events. If possible, describe the location of the shooting, the shooter's physical characteristics, and the type of weapons. Remain calm, listen, and think about your next moves.

As a last resort, if your life is in danger, you may need to take action against the shooter. If you decide to proceed, attack the shooter "aggressively and overwhelmingly" with improvised weapons. Throw objects and yell at the shooter. Law enforcement officials recommend that you "commit to your actions," don't hesitate or stop.

When law enforcement arrives at an active shooter scene, their first priority will be to identify and stop the shooter. They will go past wounded victims and may push people down to the ground. Listen to officer commands. Keep your hands visible, raised, with fingers spread wide. Don't shout, grab, point, or make distracting noises during officer response. Don't hold anything in your hand, including a cell phone, which could be mistaken for a weapon.

Active shooter situations can be random, with rapid and unpredictable events unfolding. Planning for the proper response now can boost the chance of survival through the event.

For more information, response planning guides, and training resources, go to the Department of Homeland Security website at http://www.dhs.gov/active-shooter-preparedness.

\*The Department of Homeland Security defines an active shooter as "an individual actively engaged in killing or attempting to kill people in a confined and populated area."