



ARCHDIOCESE OF SEATTLE

PARISH ANNUAL REPORT

FOR THE PASTORAL YEAR OF JULY 1, 2016 THROUGH JUNE 30, 2017

GENERAL INSTRUCTIONS

PLEASE READ THROUGH ALL THE INSTRUCTIONS BEFORE BEGINNING WORK ON THIS REPORT

Thanks for your work on the Parish Annual Report! The information you provide is vital and assists the archbishop and his staff in making decisions and policies for the archdiocese. For this reason, it is essential that your completed Parish Annual Report be submitted no later than **August 15, 2017**.

We are using electronic forms again this year and using box.com to collect your report. You will receive instructions about connecting to your parish folder at box.com in late June.

As in the past, this year's Parish Annual Report has seven sections. Please complete all sections of the report that apply to your parish or faith community. **For those sections that do not apply, please select the appropriate box on the form (Not Applicable, etc.) and also write "N/A" for the corresponding section on the Certification page.**

If you have general questions about the Parish Annual Report, please contact Ben Altenhofen in the Chancellor's Office (206-654-4655). For questions concerning a specific section of the report, contact the appropriate person listed below:

Sec. I	Demographics	Mary Beth Celio	(206) 382-4272 (800) 327-5295	MaryBethC@seattlearch.org
Sec. II-A	Financial	Sarah Diama	(206) 382-4573 (800) 422-5417	sarah.diama@seattlearch.org
II-B	Banking Information			
II-C	Building Project Forecast			
Sec. III	Planned Giving	Charisse Valtinson	(206) 274-3117 (800) 752-5902	charisse.valtinson@seattlearch.org
Sec. IV	Lease Information Request	Ed Foster	(206) 382-2064 (800) 809-4923	EdF@seattlearch.org
Sec. V	Parish Cemeteries	Rich Peterson	(253) 838-2240	RichP@mycatholiccemetery.org
Sec. VI	Certification	Ben Altenhofen	(206) 654-4655	ben@seattlearch.org
Sec. VII	Evaluation	Ben Altenhofen	(206) 654-4655	ben@seattlearch.org

TIPS FOR COMPLETING THE PARISH ANNUAL REPORT

PDF Forms

All forms, except for Section II-A: Financial, are formatted as PDF Forms that can be filled in (Section II-A is an Excel file). Be sure that the PDF viewer that you are using allows you to fill in the fields (if the PDF is opened with some Microsoft Windows programs you may not be able to fill in the form, using [Adobe Acrobat Reader](#) is recommended).

To move from one field to the next, hit the Tab key or use your mouse to click on the field you want. If no answer is applicable, type “N/A”. Please do not leave the answer blank, as this leads to confusion as to whether the answer was intentionally or accidentally omitted. You will only have to type “N/A” once per column or row.

Important Saving Tip: Depending on the version of Adobe you have, to save the sections as you work on them, you may need to save the files under a different name each time you save. This will create a need to delete the old files that are outdated. This is a limitation of using the PDF form in older versions of Adobe.

DOWNLOADING ZIPPED FOLDER:

1. Click on the link
2. Right click on the folder and choose “Save”
3. Choose where you will save the folder on your computer
4. Close your internet browser
5. Find the files saved on your computer

DOWNLOADING INDIVIDUAL FORMS:

1. Right click on the link and choose “Save target as...”
2. You can then choose where you would like to save the forms on your computer.
3. Download all the files you will need.
4. Close your internet browser.
5. Find the saved files on your hard drive.

Next steps:

1. Fill out the report
2. Save the Files
3. Digitally sign the Certification Section VI
4. Print out or save a copy of the entire report for your records
5. Upload the entire report to Box.com (instructions about this will be coming in June)

Uploading to Box:

We will be using box.com again to collect your report. You will receive instructions about connecting to your parish folder along with a link to the folder at box.com in late June. The process will be similar to last year.

Filling out the PDF Forms:

If you do not have Adobe Acrobat Reader: you can download it for free [here](#).

To fill out the forms: simply click on the highlighted fields and fill them in. Use the tab button to easily move between the fields.

To save your work: depending on the version of Adobe you have, you may need to save the file under a different name each time you save. This is a limitation of the PDF format for older versions of Adobe. This might mean saving under “Parish Annual Report-Draft 1” then “...Draft 2” and so on. **When you have completed the final draft of your report, please save each pdf form using the following method:** put your parish I.D. number first and leave no spaces. This is an example of what it should look like: 001PAR1617SecI, 001PAR1617SecII, etc. When you prepare the files for your financial statements, you can save them in a similar way. For example: 001PAR1617Financial, 001PAR1617ProfitandLoss, etc. This format helps when we archive your reports.

To sign the report, you can use a digital signature through Adobe Acrobat. If you have trouble signing the PDF Certification section, see [this helpful link](#).

UPLOADING THE REPORT ELECTRONICALLY AT BOX.COM

Like we did last year, we are uploading the Parish Annual Report to the Archdiocese Cloud File Sharing System powered by box.com. To be able to participate in this practice, each parish will need to set up a free box.com account by going to www.box.com. Please contact Ben Altenhofen in the Chancellor’s Office if you need help connecting to box.com. Further instructions on this process will be sent out in late June.

WHAT’S NEW THIS YEAR?

All forms are available for download from the Archdiocese of Seattle website

www.seattlearchdiocese.org/par

SECTION CHANGES

SECTION I: DEMOGRAPHICS

- The questions in subsection B (Parish Membership and Contributions) have been changed slightly to help clarify the location of the information in PDS.
- In subsection F-1 (Councils/Commissions), we are asking for the name and e-mail address for the current chairperson of that council/commission.

For assistance contact Mary Beth Celio, Director of Research, at (206) 382-4272 or (800) 327-5295 or e-mail MaryBethC@seattlearch.org.

SECTION II-A: FINANCIAL

- New this year: if your parish is using DioView, you will only submit specific information requested in Section II-A: Table 3: Assessment Information.

For assistance regarding the Excel spreadsheet of Section II-A, please contact Sarah Diama, Assistant PFS Director, at (206) 382-4573 or (800) 422-5417 or e-mail sarah.diama@seattlearch.org.

SECTION II-B: FINANCIAL & BANKING INFORMATION

- Question 6 asks for an estimate of the annual fees your parish pays for banking services.
- Question 12 asks you to list any unclaimed property. Unclaimed Property is money or intangible property owed to an individual or business. Property is considered unclaimed after it is held for a period of time with no owner contact and a good faith effort has been made to locate the owner. An example might be a damage deposit paid for the rental of a parish hall. If you are unable to find the person who put down the damage deposit and return the unused portion to them, this would be considered unclaimed property. As state law requires, abandoned property is turned over to the Department of Revenue.

Please read the Section II Financial Instructions for more details. For assistance with this section, please contact Sarah Diama, Assistant PFS Director, at (206) 382-4573 or (800) 422-5417 or e-mail sarah.diama@seattlearch.org.

SECTION II-C: BUILDING PROJECT FORECAST

No changes

SECTION III: PLANNED GIVING

Please note that the contact person is now Charisse Valtinson, Assistant Director of Planned Giving. You may contact her at (206) 274-3117 or (800) 752-5902 or via e-mail at charisse.valtinson@seattlearch.org.

SECTION IV: LEASE INFORMATION REQUEST

No changes

SECTION V: CEMETERIES

No significant changes

For assistance, contact Richard Peterson, Director of Cemeteries, 206-524-1451 or 253-838-2240, or e-mail RichP@MyCatholicCemetery.org.

SECTION VI: CERTIFICATION

You will be able to sign this form with Adobe Acrobat Electronic Signature. For instructions on signing the PDF, see [this helpful link](#).

For parishes with a pastoral coordinator, the co-signature of the priest moderator is no longer required. However, you should still provide the priest moderator with a copy of the report.

SECTION VII: EVALUATION

No changes. Your feedback is very helpful!

For assistance with Section VI or VII, or for general questions about the Parish Annual Report, please contact Ben Altenhofen, Vice Chancellor, at 206-654-4655, or e-mail bena@seattlearch.org.