

Archdiocese of Seattle
Parish Financial Services
July 2018 Newsletter

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Archdiocese of Seattle

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IRS Exempt Organizations Master Business File Extract Saga Ends!

You may recall in late 2015 we were made aware that the above referenced document

<https://www.irs.gov/charities-non-profits/exempt-organizations-business-master-file-extract-ao-bmf> was being used by grant makers to approve grants to charities, including our parishes and parish schools. This website lists the tax identification numbers of nonprofits that have asked to be listed. At the time, only about 25% of parishes (and their schools) were included on the list. (And we don't know why they were and others weren't.) Beginning in November of 2015, we petitioned the IRS, through the USCCB to include all our parishes (and hence their schools). After multiple requests, the last seven parishes were added earlier this month.

All parishes (and hence their schools) should now have their TINS listed (as well as the three Archdiocesan high schools). Let the PFS office know if some grant maker can't find your number. Intriguingly (and perhaps frustratingly) a recent 'IRS Procedure' (guidance document) in May suggested that grantors and contributors may not rely on an organization's inclusion in the above document. Basically, this 'IRS Procedure' says that they can only rely on the Group Letter ruling. Please remember that the Group Letter ruling for the Catholic Church in the United States (including your parish/school/food bank, listed in the Official Catholic (Kenedy) directory) is posted on our website <http://www.seattlearchdiocese.org/Archdiocese/PFS/Forms.aspx> (under the 501c3 document category).

Changes in Scrip Policy

Due to a recent significant and serious theft of Scrip at one of our parish schools that occurred due to the use of 'Presto Pay' for electronic purchasing and payment processing of Scrip, we have established this policy effective immediately: The Scrip coordinator is not allowed to approve and release his/her own Scrip purchases under electronic purchasing and payment for Scrip where the Scrip coordinator releases Scrip to the purchaser after verification that payment has been received. Another Scrip volunteer or parish staff (e.g. bookkeeper) must approve and release Scrip after verifying that payment has been received. This policy will be included in the next Parish Account Manual (PAM) update.

Additionally, the PAM calls for the Scrip inventory to be accounted for and reconciled at least monthly. If a Scrip account is not reconciled at least monthly, the Parish Financial Services office would be recommending to the pastor and principal of any school that sells Scrip that the sale of Scrip must be discontinued until they are in a position to reconcile on a monthly basis. Reconciliation must include inventory, Scrip sales and bank deposits.

DLS Update

Effective immediately; PRF will be sending confirmations out after every transaction made in DLS (i.e. deposits, withdrawals and transfers). The confirmations will come to you before you actually see it in DLS on line. DLS on line updates once a day at 7pm. If you have any questions or concerns, please don't hesitate to ask, we want to make sure all of your issues are addressed.

Loretta Griffin—206-382-4501 or lorettag@seattlearch.org

Seeking a PAA for our small, vibrant parish on South Whidbey Island.

St. Hubert Church has reluctantly accepted the retirement resignation of its current PAA and needs to find a skilled administrator who listens well, is open to new ideas, and fosters a joy-filled environment. Besides many parish ministries, St. Hubert is actively involved in local interfaith work and the office helps support these many outreach and evangelizing efforts. Interested candidates should submit a letter of interest, resume, and Archdiocese job application to Elizabeth@sthubertchurch.org. Position is open until filled.

Property and Construction Services – Small Construction Projects

Property and Construction Services (PCS) is working to support parishes and schools with small construction projects (typically valued below \$250,000). Below is a summary of the oversight required by PCS and a reminder about roof projects.

Small Construction Contracts are required for projects that involve the following:

- Contract(s) for one project exceed \$25,000.00
- Work that requires a permit (i.e. electrical, building, etc.)
- Hazardous materials, including asbestos and underground storage tanks (USTs)

Small construction contracts are generated by PCS once Contract Request Forms are completed by the Parishes and received by PCS. Please include Contractor Proposals/Bids/Estimates/Quotes, Certificates of Insurance, drawings, and other items that pertain to the project.

Consultant Agreements are for professional services (e.g. architect, engineer) signed by parish, consultant and PCS. Consultant agreements are generated and processed by PCS.

Church Worship Space and Rectory alterations may or may not require a Small Construction Contract, but a review of the work is required.

Current forms for small construction projects are available on the PCS website. Emails pertaining to projects and construction are to be sent to construction@seattlearch.org. If there are any immediate and/or urgent questions, please contact:

- Sophal Hamaker at (206) 382-4273
- Gus Ripple at (206) 382-4370.

ROOFS! Fall and winter is the best time to arrange roofing contracts for the following Spring and Summer. The best roofers fill their schedules prior to Spring and Summer. A good faith asbestos inspection report must be provided to any bidding contractor. If you anticipate a roofing project during the next two years, please contact Gus Ripple at (206) 382-4370, prior to soliciting bids.

Parish Stewardship

Now is a great time to get an early start on preparations for your Parish Stewardship Commitment Renewal. The Talent & Treasure portions of our website have been updated with the files you will need and are available for you to download. We urge Wave 2 parishes, especially, to take advantage of this early opportunity. Here is the link to that page: <http://www.seattlearchdiocese.org/Stewardship/PS/Renewals.aspx>



Planned Giving 101 – Wills

A will is a powerful document, but it does not control every component of your estate. A will does not control any assets with beneficiary designations (such as a life insurance policy) or joined in joint ownership with right of survivorship (such as a joint bank account). In other words, contractual agreements supersede your will. Your will is one component of a complete estate plan, which may include other elements, such as a community property agreement, and health care directives.

Here are some things you can **do with a will**:

- Nominate guardians for minor children
- Nominate personal representatives (a.k.a. executors)
- Give to your parish community and other charities
- Have peace of mind that your wishes will be carried out at the end of your lifetime

Consider sharing this useful bit of information with your parishioners in an upcoming letter or email, or adapt the text to fit in a bulletin, Facebook/social media post, and/or parish app message. Encourage them to consult with an attorney to discuss their unique situation. You may also include suggested bequest language and/or link to the [Planned Giving website](#) for the verbiage. For questions, contact Charisse Valtinson in the Planned Giving Office at 206-274-3117 or charisse.valtinson@seattlearch.org



Human Resources is hitting the road this summer!

As we have in previous summers, we are traveling to parishes around the Archdiocese to meet with PAA's and bookkeepers. This is a chance to catch up, answer any questions you may have, and share what's new in our office. Topics include: Family medical leave, compensation, multi-location employees, and more!

Where we'll be:

August 21st from 10:00am to Noon – St. Michael Parish, Olympia

August 28th from 10:00am to Noon – Isaac Orr, Chancery

August 29th from 10:00am to Noon – St. Charles Parish, Burlington

September 11th from 11:30am to 1:30pm – St. Joseph the Worker Parish, Vancouver. LUNCH WILL BE PROVIDED.

September 25th from 10:00am to Noon – St. Charles Borromeo Parish, Tacoma

Click here to RSVP:

<https://www.signupgenius.com/go/60b0449afab2fa5fa7-2018>

Greetings from the Archdiocese Insurance office –

- As a reminder, **property deductibles are now \$5,000**. If your property claim is under \$5,000, you do not need to call the incident in to Sedgwick. If you have any questions regarding a possible claim, please contact Nick Altenhofen at the Archdiocese Insurance office nick.altenhofen@seattlearch.org 206-382-4529.
- Your **Property and Liability Insurance invoices are available** on Risk Partner <http://login.riskpartner.com/> our online insurance database. Please be sure to download your parish invoice soon. Similar to last year, parishes will have until Sept. 30th to pay their invoices in full before interest charges of 5.5% per year accrue. If you have any questions, please contact Nick Altenhofen at the Archdiocese Insurance office.
- We recently experienced a substantial property loss of approximately \$300,000 in one of our churches due to a fire started by some votive candles which ignited a nearby statue. **Please inspect your votive holders and displays to assure that they are in good condition** and that there are no potential issues. Also, if your votive holders are over carpet or near other flammable items e.g. flowers, banners, etc., please consider putting procedures in place to extinguish all candles at night. Thank you!!
- In the past, you have been contacted by Hartford Steam Boiler to do an inspection of your pressurized vessels. We have made a change in providers; moving forward **Traveler's will be performing these boiler inspections**. If contacted by Traveler's, please work with them to schedule their visit.

MISSIONS
OFFICE



CCHD grants approved and at work!

The U.S. bishops' Catholic Campaign for Human Development established a grant program to support organizations led by low-income individuals as they work to break the cycle of poverty and improve their communities. To see a list of the Archbishop Sartain-approved grants active in western Washington, and learn more about CCHD and the grants process, please visit www.seattlearchdiocese.org/cchd.

The annual collection for CCHD in all parishes will be held September 15/16. Bulletin inserts and other materials will arrive and be available online in August. Questions or suggestions?

Contact us at missions.office@seattlearch.org.

Called to Serve as Christ Campaign

Called to Serve as Christ Campaign Website is active

www.calledtoserveaschrist.org This site has lots of helpful information, FAQ's, video and other information. It can be a great resource for parish staff, Pastoral and Finance Council members, volunteers, etc. When your parish is active in its "Wave," it would be a great idea to feature a link to the Campaign website on your parish's own Homepage.

Called to Serve as Christ Campaign Facebook page is active

The campaign Facebook page is a good way for parishes to learn more about what the campaign hopes to accomplish for the future of our archdiocese. Go to www.facebook.com/CalledToServeAsChrist/ and "like" the page today!

NOTE: For parishes in Wave 3 and 4, it is advisable to hold off on encouraging your parishioners to "like" the page until your wave begins, as coming posts will be related to Wave 2 fundraising activities. We still ask the parish, pastors, and staff to like the page in order to keep in touch and up-to-date about the campaign details and progress.

Campaign Activities

Pilot wave

The 13 parishes in the Pilot Wave are to be commended for their valiant and determined efforts as "Pilot Wave Pioneers"! The priests, deacons, parish staff and generous volunteers of this trailblazing group went above and beyond to make the *Called to Serve as Christ* campaign as successful as possible in their parishes. Archbishop Sartain and the Stewardship and Development team are truly grateful for their hard work, care, and passion. Because of their candid feedback regarding every aspect of the pilot, the *Called to Serve as Christ* campaign will be much stronger and effective in Wave 2. Next month, we will have an update on the Pilot Wave fundraising totals.

The 13 Pilot Wave Pioneer Parishes are:

- All Saints Parish - Puyallup
- Our Lady Queen of Heaven Parish - Tacoma
- Sacred Heart Parish - Tacoma
- Ss. Cosmas and Damian Mission - Orting
- Ss. Peter and Paul Parish - Tacoma
- St. Aloysius Parish - Buckley
- St. Ann Parish - Tacoma
- St. Frances Cabrini Parish - Lakewood
- St. John Bosco Parish - Lakewood
- St. John of the Woods Parish - Tacoma
- St. Joseph Parish - Tacoma
- St. Leo the Great Parish - Tacoma
- St. Martin of Tours Parish - Fife

Wave 2

All 42 of the Wave 2 parishes are currently in the middle of the preparation phase of the campaign. Fundraising activities will begin around Labor Day. Please pray for the success of their efforts on behalf of our priests, sisters, and parishes.

Seafarer's Ministry

Did you know that the archdiocese has a Seafarer's Ministry? This is an ecumenical effort that ministers to ship workers who come to our port from around the world. Seafarers are away from their families for 9+ months out of the year and – while at port – they desire to access their faith, stay connected with loved ones, share their stories, and receive necessary supplies. Our ministry helps with all of those things. And you can help too!!

Please join us at our annual "Home from the Sea" Shipboard Luncheon in support of this ministry. **Saturday, July 21st** from 10:15 AM – 2:00 PM aboard Holland America's Eurodam cruise ship at Pier 91. \$50 per person. Raffle available to win a FREE CRUISE! We will be joined by Bishop Mueggenborg! Please promote widely and please join us! Flyers are attached. Your participation allows us to ensure that all seafarer's feel beloved!

To attend, Please RSVP to Ashley Reinsmith at ashley@mts-seattle.org

To learn more about Seafarer's Ministry, please visit the website:

<http://www.mts-seattle.org/> or
<http://www.seattlearchdiocese.org/Ethnic/PC/Seafarers/Default.aspx>



ARCHBISHOP BRUNETT
RETREAT CENTER AT
THE PALISADES

2018 Upcoming Retreats

Register Online at PalisadesRetreatCenter.Org

AUGUST 3-5

["Betrothed: A Preparation for the Sacrament of Marriage"](#)

Engaged Couples' Retreat

Led by Dr. Sarah Bartel & Nathan Bartel

AUGUST 24-26

["St. John Paul II, Divine Mercy, and Healing of Memories"](#)

Silent Women's Retreat

Led by Dawn Eden

OCTOBER 5-7

["Five Ways to Tune Your Interior and Spiritual Life"](#)

Sponsored by the Lay Carmelites of WA & BC

Led by Br. James Lindsay, OCD

OCTOBER 12-14

["Becoming an Ordinary Martyr"](#)

Young Adult Retreat, Ages 18-30

Led by Bishop Daniel Mueggenborg

OCTOBER 19-21

["Pre-Cana: Retiro Pre-Matrimonial de Parejas"](#)

Retiro de Encierro en Español

Alvaro y Ana De La Cerda, Erika y Mario Gutierrez

The Archbishop Brunett Retreat Center at the Palisades
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