



Memo

Date: July 9, 2018

To: Parish and School Business Managers

From: Michael Warren, Controller;
Patrick Warner, Parish Accounting Manager;
Susan Shirley, Parish Systems Manager; Office of Finance

Re: Recap of Parish + School Insights Conference (P+SIC)

Please see the following recap of presentations from the Parish + School Insights Conference (P+SIC) held on June 26, 2018.

There were 67 locations represented, including 35 SAS locations. With locations (parishes, schools, missions) not in attendance, we are presenting this recap of the topics of relevant information.

Aside from the weekly Communique, we try to include as many timely topics in our twice per year P+SIC meetings. Of the 14 topics, 10 were of interest to both parishes and schools, which we do at each of these meetings.

If you have any questions for the presenters, please contact them for further information. Please share your topic suggestions for future meetings. **The next P+SIC meeting is scheduled for November 6 and 7.**

The conference included:

- Updates on HR Systems, Insurance Claims, Benefits and Connect Now Accounting
- USCCB Audit Information
- ParishSOFT Roadshow
- Building a New Parish and Community
- Priest Email Project
- Information from the Catholic Foundation and the offices of Communications and Archives and Records

- Introduction of Christopher (Kit) Parker, new Executive Director of Stewardship - KParker@archatl.com, 404-920-7615
- Introduction of Andrew Lichtenwalner, new Director of the Office of Formation & Discipleship - ALichtenwalner@archatl.com, 404-920-7624

PRESENTATION RECAPS

HR SYSTEMS UPDATE

Shannon Wiggins, HRMS Analyst

Email: swiggins@archatl.com, Phone: 404-920-7492

- There have been 3 Ultimate Demo introductory sessions
- We are not just replacing the payroll system – we are using an entire HR system that includes Applicant Tracking (ATS), Onboarding, Payroll, Time Management, Open Enrollment and Life events.
- We also plan to consolidate volunteer and employee workflows into Ultimate – one record per person.
- First group to go live will be this November (change from October 2018).
- All locations will move to bi-weekly, withholding two weeks about two months prior to Go Live month. Contact Human Resources for help with deciding when and how to do this and for ways to communicate this to your staff without causing panic – we can help with suggestions on how to ease the transition.
 - All employees at your location will have the same pay period and check dates.
- What does “Go Live” mean? The month first payroll checks will be issued (not necessarily the first day of the month).
 - Locations will run dual entry in Paychex and Ultimate for approximately four payroll cycles. Example: If scheduled to “Go Live” in November, you must be on new pay period and perform dual system entry starting September 14, 2018.
 - Time Management will actually “Go Live” first – employees will need to key their time two weeks prior to the first live check date.
 - Priests will not be required to track or key their hours worked.
- Trainings will take place about 3 months prior to “Go Live” –this is developing as we speak.
- In an effort to streamline and modernize our systems, we are offering a pay card option in lieu of live checks for employees who do not wish to/cannot use direct deposit.

This is a big project – questions and comments are welcome. The Office of Human Resources thanks you for your continued patience and cooperation.

USCCB AUDIT INFORMATION

Perla Freed, Director of Safe Environment Program
Email: PFreed@archatl.com, Phone: 404-920-7550

The USCCB Audit will be taking place at the Archdiocese of Atlanta October 8-10, 2018. Information will be shared soon containing a location checklist and the “to dos” for all locations. The auditors will pick 3-4 parishes and 1-2 schools to do on site audits. Further information will be coming out in the next couple of weeks via a memo from the Archbishop.

PARISHSOFT ROADSHOW

Susan Shirley, Parish Systems Administrator
Email: SShirley@archatl.com, Phone: 404-920-7408

- 85 of 105 parishes have migrated to the cloud-based ParishSOFT
- More upgrades/trainings will continue this summer
- Continued training will be available at the ParishSOFT Roadshow this fall.
 - ParishSOFT trainers and developers will be at the Chancery to deliver a full day of training in ParishSOFT Accounting on Tuesday, November 6 and a full day of ParishSOFT Family Suite Training on Wednesday, November 7. Mark your calendars now!
- Complete this [survey](#) to help us determine the most requested class offerings for the ParishSOFT Roadshow.

Building a New Parish and Community
Father Mark Starr, Pastor at St. Clare of Assisi

Phone: 770-485-0825

- We must all have a passion for our faith and the needs of our church
- Our churches must demonstrate stewardship by helping others in the community (e.g., food bank, donations to less fortunate parishes, etc.) – lead by example
- Help families learn about stewardship by teaching children
- It is not always necessary or even prudent to spend parish funds on offertory enhancement or capital campaign programs. These programs

are very expensive and usually offer only a short-term increase in offertory, followed by an eventual decline.

- Focus on spirituality and community – adoration, special Masses, etc.
- Financial sacrifice comes from all levels and starts at the top
- Run a lean organization and let frugality be witnessed; encourage volunteerism
- Involve and challenge the youth to participate
- Parishes should strive for full transparency with all financial reports
- ParishSOFT provides timely contribution details and easy to use reports
- Encourage online giving and don't be shy about its benefits to the community
- Use every communication vehicle available – website, email, homilies, Facebook, Instagram to reach people where they are - and reach them again and again

PRIEST EMAIL PROJECT

Tom Hardy, Director of Information Technology
Email: THardy@archatl.com, Phone: 404-920-7454

Initiated by Bishop Talley in 2015, each priest is assigned a single point of “known” contact through an archatl email account that is secure, supported by the Archdiocese Information Technology (IT) department and easy to use.

- Phony emails, phishing, and other fraudulent email communications now require much tighter safeguards over all of our email communications, as they often create havoc on and between our users' computers and those they correspond with in parishes and schools.
- Rollout, training and publicizing the archatl.com-based accounts have occurred for nearly three years.
- The IT department continues to offer support sessions and help priests setup their archatl accounts on PCs, smartphones, tablets, etc.
- Archbishop Gregory distributed a memo on May 1, 2018 stating that all email communications from the Chancery would only go to assigned archatl email address.
- Priests should be aware that Chancery employees were instructed to send all outgoing email communication to their archatl.com accounts only. Therefore, if they want to stay abreast of Chancery information, they will need to check and use their archatl email.

- If multiple mail accounts seem too cumbersome for the priests, we strongly recommend emails be combined by forwarding to the archatl address, rather than forwarding archatl correspondence to a personal or parish email address.
- For locations using Microsoft Office 365 to handle parish-based email, we it is easy to configure an Outlook client where multiple mailboxes can be viewed separately under one simple interface. Parishes should contact their support vendors for more information or assistance on how to configure this setup. For those sites not using Office 365 or just need an easy way for the priests to access their accounts, we recommend the Outlook Web App.
- Priests should stop publicizing all non-parish or non-archatl related accounts on websites, in bulletins, on business cards, etc. – including those such as Gmail, AOL, Yahoo, Comcast or other ‘third-party’ mail systems. The IT department and/or parish support groups have NO control over these accounts, and as such represent a significant exposure to your parish email systems.
- In a recent Chancery-based survey, all priests were sent an archatl account email and asked to reply once received. Out of the 290 messages sent, fewer than 100 (35%) of priests replied.
- The IT department will be sending out an online survey (similar to one sent about two years ago) asking for updates and/or confirmations on several items. Business managers will be notified of these surveys by email. Please respond in a timely fashion.
- If anyone needs assistance with email setup at parishes, please contact our department at support@archatl.com or 404-920-7450.

INSURANCE CLAIMS, UPDATE AND NEW RATES

Michael Warren, Controller - MWarren@archatl.com, 404.920.7411
 Alex Hagan, Catholic Mutual Claims Manager
AHagan@catholicmutual.org, 404-920-7376

Past year's property claims

- Water claims were 5 times higher this past year (\$208k) than the prior year (\$41k).
- Total property claims were \$500k versus \$265k in 2017.
- Liability claims were down to \$28k versus the prior year at \$183k
- Auto claims went down to 36 claims versus 42 in prior year, but claim dollars grew from \$151k to \$212k.

- Overall total property, auto and liability claims went from 70 claims (\$600k) in 2017 to 59 claims (\$740k). These numbers were below the average of the past 8 years (64 average claims/year, and over \$1M in claims dollars.).
- “Avoidable” claims this past year included a tent that was not removed before Irma, tree damage where a parishioner warned a parish about a tree that fell on their property and an elderly parishioner falling in the parking lot.

The general property, liability and auto claim trends over the past years have been rising. The annual budget instructions indicated a 0% to 10% increase in insurance rates. However, based upon the claim dollars and the increased property values (from Catholic Mutual), the decision was made to keep insurance rates on the low end (average of 1.5%, though some will increase in the range of 1% to 5%) - by increasing the property deductible from \$2,500 to \$5,000 (per claim maximum). The Archdiocese’s deductible will be \$150,000 max per parish/school claim.

The wide range of accident and personal injury claims that arose at other dioceses have helped us develop better risk management procedures at our parishes and schools. Claims included falls from ladders and stairs, lifts, auto accidents by staff members, wrongful terminations, slips on stairs, trips over floor tiles, injuries from coffee burns, boating and jet ski accidents, etc.

Twelve “care and compassion” claims were paid totaling \$25,000 this past year for individuals who were injured on our properties, but we had no liability for the incident. Reminder that parish “ministry” events are covered by our general insurance, but significant parish events (festivals) may warrant special insurance, and non-parish events (wedding receptions, etc.) require special events coverage (\$95/day).

Catholic Mutual continues to add online safety videos, including new videos on bullying and “Be Smart – Drive Safe.” Many videos are in English and Spanish. Student and sports accident coverage is available with the STAR form to all parish sports programs who need accident and liability coverage.

CATHOLIC FOUNDATION UPDATE

Nancy Coveny, Executive Director of the Catholic Foundation of North Georgia
Email: NCoveny@cfnga.org, Phone: 404-497-9440

There are upcoming changes from the Foundation’s conversion to a new accounting software and grants management software. The quarterly reports, previously produced manually from the SunTrust fund accounting reports, will be produced from the accounting software as “statements of fund activity.” The

reports will include administrative fees charged to the fund but not yet transferred out of it, and the gifts recorded but not yet transferred into the endowment. The new reports will begin with the September 20, 2018 quarter. Please call the Catholic Foundation with questions.

The Catholic Foundation has launched its new website at cfnga.org. We encourage everyone to visit it for information and resources available for parishes, schools and donors. There is also a section for grants.

In August, the foundation's new online grant application form will be accessible on the site. We will no longer accept paper applications.

The new grant priorities framework is described for competitive grants programs. Applicants will need to note which of the three grant priorities are applicable to the grant application: 1) Catholic Social Teaching and Works of Mercy, 2) Growing our Catholic Faith and 3) Catholic School Education. The general grants program name changed to "Catholic Community Grants."

BENEFITS UPDATE

Lily Gallagher, Human Resources Benefits Manager
Email: LGallagher@archatl.com, Phone: 404-920-7485

Presented about the Lay Pension Plan and Trust, ACA Reporting, Group Health Benefits, Retro Payroll Deductions and Meritain Billing, the 403(b) and Workers Compensation and OSHA:

Lay Pension Plan and Trust

- DCLs emailed week of May 21
- Due: Noon Tuesday July 10
- Address Changes

ACA Requirements

- Annual Measurement Reporting
- Quarterly Reminders
 - Continue to check your hours worked (ACA specifies 30 hours/week for FT, AOA specifies 28.8 hours/week)

Group Health Benefits

- Optum Rx
- Timely Terminations and Status Change Notifications

Reminder Retro Deductions and Meritain billing

- 125 Health Plan Document – pre tax provisions
- No retro deductions through payroll
- Employee payment to location for full amount – no pre tax
- Check, Cashier Check, Money Order payable to the location
- 30 day billing credit through Meritain

403(b) Meetings

- Contact Fay Duhe` - fduhe@archatl.com, 404-920-7484

Workers Compensation and OSHA

- WC Pre Employment Medical Questionnaire
 - Job Description
 - Can individual perform the essential job functions before hiring?
- Law Suits
- Horse Play
- Ongoing issue with claim reporting
- Effective January 1, 2015 Subject to OSHA Reporting
 - Critical that workers comp incidents be reported timely
- OSHA reporting requirements
 - Within 8 hours - All work-related fatalities
 - Within 24 hours - Inpatient hospitalization (formal admission), More than 2 employees in same incident; Amputations; Loss of eye
- Incident Reporting
 - Certification of Posting OSHA Notification of Employer Reported Incident
- Annual OSHA LOG

<p style="text-align: center;">CONNECT NOW ACCOUNTING UPDATE</p>

Patrick Warner, Parish Accounting Manager

Email: PWarners@archatl.com, Phone: 404-920-7410

ParishSOFT Accounting

- New GL accounts and departments
- Survey parishes and schools asking for suggestions on possible new GL accounts and department - process will start Fall 2018 to have new accounts & departments ready for budgeting Spring 2019
- Depending on scope of the project, we may or may not need to committee

Year-End Memo in Communique

- Probably will be in the July 16 Communique
- The Communique is our main source for distributing information. Those not receiving it can click [here](#) to sign up.

Pension Payment

- Monthly billing starting with FY 2017-2018 based on the last full Arch billing FY 2015-2016. In October/November 2018, the Office of Finance will “true-up” the billed amount to the actual amount from Lily. Pension billing for FY 2018-2019 will be based on FY 2016-2017 actuals.

No need for a pension accrual at 6/30. Some parish may not have pension eligible employees. We will adjust the billing accordingly.

Deposit & Loan Fund and New Payment Process

- There is a new vendor in ParishSOFT for D&L Fund, set up by Brad Wilson, called the AoA D&L Fund. It has the Chancery mailing address.
- All savings deposits and loan payments will now be sent to the Chancery – NOT the Wells Fargo lockbox. Brad has created a new vendor in each location's ParishSOFT Accounting – AoA D&L Fund; this new vendor has the Chancery mailing address. In the near future, after an upgrade to Serenic, the locations and Chancery will process these deposits and payments as ACH transactions

Important Due Dates

- ParishSOFT Accounting year-end closing - August 31
- Annual Certification Letter - September 30
- Parish/School Annual Report - October 31

CONSCIOUS COMMUNICATIONS

Paula Gwynn Grant, Director, Office of Communications
PGGrant@archatl.com, 404-920-7344 (office), 470-558-6420 (mobile)

- Please observe our [Media Policy](#) and notify the Communications Director as soon as any member of the media contacts you or shows up in your parking lot.
- If ambushed or you cannot avoid a reporter when going to/from your car or the parish/school, kindly (*this is an evangelization moment – Catholics responding to a real-life situation*) explain to them that you are unable to answer their questions, but you can get them someone who will. Give Paula's cell phone number and email address.
- Please make sure you and your staff are always following our [Social Media Policy](#). Please follow all archdiocesan social media accounts and share our posts ([Facebook](#), [Twitter](#), [Instagram](#), [YouTube](#), [Vimeo](#) and [Pinterest](#)).
- The Communique is available for every parish and school to utilize when wanting to share news with all in the archdiocese. Please submit your announcements by Thursdays at 11:00 a.m. for inclusion in the following Monday's Communique (communique.archatl.com).

- The parish bulletin is the most effective method of communication to reach your parishioners. Remember, not everyone connected to your parish shows up in-person. Therefore, be sure to park each week's parish bulletin on your website and keep your website current. Former parishioners and alumni, shut-ins, visitors, etc. also want to know the news of your parish and may then be inclined to provide financial support.
- The most-searched information on a Catholic parish's website are the Mass times. Put them on your home page so they are easily found. Do not put them under "About Us" or any other section. People won't take time to go through too many clicks to find them.
- Be sure to email information to your parishioners regularly using Constant Contact, MailChimp, or a similar service. This is the most immediate method of communication to reach your people. If you are in need of a discounted rate that you cannot negotiate, please contact the Office of Communications for assistance.
- The Georgia Bulletin is our official archdiocesan newspaper. Read our stories (print and e-version) and submit your stories to be covered to editor@georgiabulletin.org.
- Be aware and sensitive in all your communication to be inclusive of people/parishioners of all cultures. Make sure your marketing, parish photos and all outreach materials reflect the faces of all people, not just any one group. Choose inclusive language and not words that are negatively-charged or may be perceived negatively. Being mindful is half the job. With this consciousness, you will better connect with your various audiences and positively use the power of words.

ARCHIVES OVERVIEW

Angelique M. Richardson, Director, Office of Archives and Records
 Email: ARichardson@archatl.com, Phone: 404-920-7694

The Office of Archives and Records is here to help you manage your active and inactive day-to-day records, as well as assist you in preserving the permanent historical records documenting the history of the Catholic Church in North Georgia.

Our [website](#) has a ton of helpful documentation and information. Please pay special attention to our Records Management section, as that is where you can find our Records Retention Schedule and our Disposition Request Form. Another helpful area of our website is our Sacramental Research section

that includes our Sacramental Records Handbook, which provides instruction on how to properly keep sacramental registers in accordance with Canon Law.

Please do not hesitate to contact us if you have any questions about the information on our website or if you want us to schedule a visit to your parish/school/institution to review records. We are more than happy to assist you in all things records or archives related.

Office of Archives and Records

records@archatl.com or archives@archatl.com

404-920-7690

[Facebook page](#) - #SisterSundays are quite popular!