

# ARCH SUPPORT

Issue 142

September 2019

## *From The Desk Of The Chancellor..*

We all have times of the year when we have extra work with more meetings, numerous events, and long lists of tasks to complete. Late summer and early fall is certainly one of those times for most of us at the Pastoral Center. The Finance Office is completing the annual audit, the Office of Catholic Schools is overseeing the first weeks of the new school year, the Personnel Office of preparing for the annual employee benefits renewal process, and the Office of Mission Advancement is launching the Catholic Services Appeal. The other archdiocesan agencies have similar September challenges, and I know that parishes are equally busy with all that this time of year brings.

One of our important responsibilities each fall is to prepare our archdiocesan **Accountability Report**. Cecelia Price, our Chief Communication Officer, oversees this effort with great assistance from her colleagues in the Finance Office and with input from all of the archdiocesan agencies. This document provides our pastoral leaders and parishioners with an accounting of some key accomplishments of the past year. The report highlights the work of the agencies and includes a financial report of the income, expenses, and investments of the Archdiocese and various entities. We print a booklet version of the Accountability Report, which we send to staff and council members of the Archdiocese and parishes, and we publish the same report in *The Record* (this year on October 10), so that every registered household has the opportunity to review this report. It also is included on our web page at [www.archlou.org](http://www.archlou.org).

Preparing and distributing an accountability report is an essential act of good stewardship. I am pleased to see so many of our parishes prepare similar documents for their local community.

The mission and resources of the Church are gifts given and entrusted to our care. We do not own the Church; instead, we care for it, nurture it, and build it up for the sake of the Kingdom of God. What we do with the gifts given to us is our response as grateful members of the faithful. As the famous stewardship quote proclaims, “Stewardship is everything we do after we say we believe.”

We have prepared a report like this for close to 30 years. This tradition is unique in the country. I hope you take the time to read the annual report and take pride in the mission we all share.

### *Now a few updates:*

Archbishop Kurtz - I hope you have been reading the wonderful updates on his health from Archbishop Kurtz, which have been published in *The Record* and sent out through social media. He deeply appreciates the messages of support and prayers he has have been receiving. November will be an important time as he undergoes surgery. We pray that God’s healing presence will be with him and with those who provide his medical care.

Catholic Services Appeal – As noted above, this is CSA season. This essential annual appeal provides the funding for over 100 ministries and services, which assists every one of our parishes and thousands of people each day. Every employee, every priest, every deacon, every seminarian, along with every parish, school, and agency, benefits from the ministry the appeal supports. We ask for your support and ask that you encourage others to support the Appeal as well.

*Continued on Page 2*

Because of the success of this free-will offering, we have been able to reduce parish assessments twice in the past three years. So let us continue to work together to meet our local and archdiocesan goal.

Financial Literacy Training - We are nearing the completion of our three-year grant from the Lilly Endowment. We have greatly benefited from this grant and the training and resources it has provided. The re-designed retirement plan, the 360-feedback process, the Parish Discernment Process, the first-ever Lay Ministry Assembly, and dozens of training initiatives have resulted from this grant. Patiently and prayerfully, we await news later this year in response to our second grant application to support ongoing efforts in leadership development and financial literacy training. Still to come from the first grant are mini-workshops on helpful topics such as, "Preventing Identity Theft," "Saving for Retirement," "Getting Out of Debt," and more. If you would like to host one of these free 45-minute sessions at your location for local parish and school employees, please let us hear from you.

Thank you for all that you do each day to serve the Church and community of Central Kentucky. God bless you always!

---

## FROM BRAD HARRUFF CATHOLIC MUTUAL CLAIMS/RISK MANAGER

First, let me congratulate any of you that have already developed or are developing your Church security plan. For those of you that have gotten off to a slow start you received a letter regarding the availability of a free assessment from Overwatch, a company specializing in Church security. If you wish to contract them for more, they will do so for a fee to develop your security plan. Overwatch is a vendor, and made available as a resource to assist you and their use is in no way required by the Archdiocese.

Regarding the usage of our facilities by outside groups, you are aware of the financial policies and procedures requirements regarding insurance, however your location should always be using a lease/usage agreement for these functions as well. If you need to develop or even update yours, written templates exist on the Archdiocesan Financial Procedures page under "Facility and Property forms/Agreements" as well as other resources to assist you.



Certificates of Insurance are needed for any 3rd party entity using Archdiocesan property unless they are already part of our plan. Some Catholic organizations locally are not on our plan and they include a few of the High Schools, The National Organization of St. Vincent DePaul and the Knights of Columbus. If you have questions on whom is included, please give me a call.

It has been a good summer for our self-insurance plan so thanks for your hard work.



## *It's time to kick-off another great CSA Year!*

The Office of Mission Advancement is excited to officially kick-off the Catholic Services Appeal 2019 on October 1st. We want to thank all of the pastors, pastoral administrators, parish staff, Archdiocesan staff, and volunteers for your support this year promoting the Catholic Services Appeal in your own parishes and ministries. It is a team effort, and we definitely cannot do it without your support.

**Our CSA Goal this year is \$3.9 million!**

*Together, we can make this another successful  
Catholic Services Appeal!!*

### **Upcoming Dates:**

October 1st- CSA Kick-off!  
October 1st- Appeal Letters mailed  
October 12/13- CSA In-pew weekend



**LINDA HILL, Secretary – Mission Advancement/Finance Office**  
**TIMOTHY TOMES, Archdiocesan Archivist – Archbishop’s Office**

---



**Humana Go365**

It is that time of year again to plan an onsite biometric screening at your location for the New Year!

Please email Laura Graves with three potential 2020 dates.

---



**I-9 Form**

The U.S. Citizenship and Immigration Services (USCIS) has informed employers in the United States to continue using the Form I-9 (Employment Eligibility Verification), despite the expiration date listed on the form of August 31, 2019, until a new version becomes available.

# FINANCE OFFICE NEWS

## PASTORAL CENTER REPORT REMINDER

Please contact the Parish Liaison, Margaret Kopatz Kraus, for assistance with implementing the use of Multiple Retained Earnings Accounts for Restricted Funds on PDS Ledger. **This will ease the month end closing process.** Margaret is available for any type of PDS Ledger or financial operation questions or training. She can be reached at (502) 471-2262 or [mkkraus@archlou.org](mailto:mkkraus@archlou.org).

## TIPS FROM THE INTERNAL AUDIT TEAM

- Keep insurance certificate file current for service providers used by the parish or school. Any certificates with expirations older than 5 years may be destroyed.
- Review the Insurance Ledger page received from Catholic Mutual promptly to assure the parish or school property is properly insured.
- Keep parish or school property listing and videos/photos updated (annual basis recommended).
- Parishes/schools with Kentucky Retail Alcohol Licenses-Kentucky sales tax must be collected and remitted for sales of the alcohol covered under the permanent retail license held by the parish. Alcohol sold under a temporary license is exempt from sales tax. In addition, all alcohol sales under a permanent or temporary license are exempt if sold at a school fundraising event and **all** the net proceeds go **directly** back to the school.
- This is a good time of year (9/1/19 - 12/31/19) to have parish or school Audit Committees to perform the internal audit of fiscal year ended 6/30/2019 financial records and internal controls. If you have any questions, please contact Margaret Kopatz Kraus for assistance.





## OCTOBER 2019 ANNUAL BENEFIT MEETINGS

Please note these October Meetings are the 2020 Annual Benefit Meetings. A representative from each group participating in the benefit program is required to attend one of these meetings.

Wednesday, October 23rd – 1:00 pm – Pastoral Center  
 Thursday, October 24th – 10:00 am – Pastoral Center  
 Thursday, October 24th – 1:00 pm – Pastoral Center  
 Friday, October 25th – 10:00 am – Bardstown – Saint Joseph Parish Hall  
 Wednesday, October 30th – 10:00 am – Pastoral Center

---

## Parish and Regional Schools Business Managers Roundtable

### NOVEMBER ROUNDTABLE

November 21, 2019  
 11:30 am  
 St. Gabriel  
 Hosted by: Pam Terwilliger  
 RSVP and agenda items to: [pterwilliger@stgabriel.net](mailto:pterwilliger@stgabriel.net)

---

## DECEMBER 2019 ARCH SUPPORT MEETINGS

Tuesday, December 3rd - 10:00 AM - Bardstown - St. Joseph Parish Office  
 Wednesday, December 4th - 10:00am - Pastoral Center

---

### PARISH MAILING DATES

October 11th and October 25th  
 November 8th and November 22nd  
 December 13th

### ARCH SUPPORT ON THE WEB

To read this newsletter online or print additional copies: Go to the archdiocesan web site [www.archlou.org](http://www.archlou.org)

- Click on “About the Archdiocese.”
- Click on “Publications/Media”
- Click on “Arch Support”
- Choose Specific Issue