



ADMINISTRATIVE *Insights*

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Mission Statement of the Archdiocese of Milwaukee:

To proclaim the Gospel of Jesus Christ through his saving death and resurrection by calling, forming and sending disciples to go and make new disciples. As a people, we are called to encounter Jesus and grow as disciples through the sacramental life of the Church.

Welcome to Administrative Insights!

*Moreover, it is required of stewards that they be found trustworthy.
1 Corinthians 4:2*

This quarter, you will notice that “Funny You Should Ask” and “Parish & School HR Newsletter” have been replaced by “Administrative Insights.” With this new format, we plan to include more administrative topics that pertain to Pastors/Parish Directors, School Presidents/ Principals, Directors of Administrative Services, Directors of Finance, Business Managers, Bookkeepers, and HR Staff. Our goal is to streamline communications and ensure all stakeholders receive important information from the Archdiocesan offices that support both parishes and schools. If you have any suggestions for future topics, please send your suggestions to us.

The administrative role you play is key to keeping the parishes and schools running, playing an integral role as stewards of parishes and schools.

Have a blessed autumn!

Rob Kratoska, CPA, CMA
Director of Parish & School
Financial Consulting

John Barker
Director of Parish & School
Human Resources

Employment Law Overview Training

Unlock the essentials of employment law designed for parish and school business managers. Gain a clear understanding of key legal principles affecting hiring, employee rights, and compliance issues unique to the church. Archdiocese of Milwaukee General Counsel and Parish and School HR Office will walk you through the latest regulations, provide practical insights into handling common employment challenges, and offer strategies to mitigate risks while fostering a positive workplace culture. Whether you are dealing with volunteer management or staff policies, this workshop will equip you with the knowledge and tools you need to ensure legal compliance and support your organization’s mission effectively.

Registration for this Microsoft Teams Webinar is required.
Please click the date and time below to register:

[Tuesday, September 10th, 11am](#)

or

[Tuesday, September 24th, 2pm](#)

Recorded training sessions and presentations, if available, may be viewed here: [Parish Training \(archmil.org\)](#)

Department of Labor Rule on Salary and Overtime

As you may remember, the [DOL issued a new rule](#) raising the salary basis for overtime exemptions effective July 1, 2024 to \$844 per week (\$43,888 per year) and a second increase effective January 1, 2025 to \$1,128 per week (\$58,656 per year).

A challenge to this rule was brought by the State of Texas and the US District Court for the Eastern District of Texas granted an injunction applying *only* to those individuals employed directly by the State of Texas. Given how narrow this injunction is, **it does NOT APPLY to our parishes or schools and does not change anything** in terms of planning for the January 1st increase. To date, no other injunctions have been issued. As more information becomes available, we will share that with you.

Please contact ParishandSchoolHR@archmil.org with questions.

Voter Education Materials

To assist you and to help the Catholic faithful prepare for the elections, the [Wisconsin Catholic Conference \(WCC\)](#), which is the public policy voice of the Wisconsin bishops, is distributing resources to help Catholics reflect on what it means to be a faithful citizen.

As in years past, the WCC resources are based on the [U.S. Bishops' statement](#), *Forming Consciences for Faithful Citizenship: A Call to Political Responsibility from the Catholic Bishops of the United States*. WCC resources include a letter from Wisconsin's bishops, a [bulletin insert/handout](#) on *Our Call as Catholic Citizens*, and a [website](#) with more resources on *Forming Consciences for Faithful Citizenship* and voting information from the State of Wisconsin, including bulletin announcements and social media graphics. Parishes are invited to share the resources in bulletins and digital communications.

WHAT MATERIALS MAY AND MAY NOT BE DISTRIBUTED BY PARISHES/PARISH LEADERS

Please accept this gentle reminder that the only voter education resources regarding state or national elections that may be distributed on Church property or used in any official capacity must be prepared by the Holy See, the United States Conference of Catholic Bishops, the Wisconsin Catholic Conference, or the Archdiocese of Milwaukee. **No other resources may be distributed, even if they say "Catholic" on them.**

If you have questions or concerns, or need help evaluating materials, please contact Susan McNeil at mcneils@archmil.org or 414-758-2214.

Upcoming Dates

Confidential Financial Statement (CFS)

- Parish/school NOT participating in School Choice: September 16, 2024
- School participating in School Choice: October 31, 2024

Email completed CFS packages to parishfinance@archmil.org.

School Choice Financial Audits & Management Letters

These are due to Department of Public Instruction on October 15th.

As soon as a school has its financial audit and management letter, please submit the files to parishfinance@archmil.org. As a reminder, if the school is a parish school, these audit reports should be shared with a parish's trustees and finance council. Many audit firms will present to the finance council to answer questions about the audit, if requested to do so. If your finance council is interested in this, please contact your auditor about attending a finance council meeting.

Building Commission

- October 10, 2024; Paperwork is due by September 26, 2024
- December 5, 2024; Paperwork is due by November 21, 2024

To place your parish on the schedule, contact Jane Ore at oreg@archmil.org or 414-769-3340.

Priest LTD Invoice

The **annual** Priest LTD premium will be billed as a separate line item on the October 2024 invoice from BAS. This premium pertains to Archdiocesan priests only.

NEW! Principal Evaluation Toolkit

By request of many pastors and principals, Parish & School HR (PASHR) and the Office for Schools collaborated on an updated toolkit for evaluating Principal performance. It includes two parts:

1. **Updated Principal Effectiveness Framework** to be used as a Principal growth tool and self-evaluation.
2. [New Principal Performance Evaluation Form](#), which will act as the Pastor or President's primary tool to evaluate Principal performance and fulfil the requirement of annual evaluation of principal performance from [Parish and School Policy 4510](#).

We will be soliciting feedback from targeted groups but welcome additional feedback from any pastor/principal or president/principal pair that uses the new toolkit this year. Please email any feedback to ParishandSchoolHR@archmil.org.

NEW! Reference Checking Guide

Recruitment season isn't over yet! Check out our new [Reference Checking Guide](#) on completing candidate reference checks, including a sample reference check form.

Workers' Compensation Carrier Change 7/1/2024

Effective July 1, 2024 United Heartland is our new workers compensation insurance carrier. All work-related injuries incurred on or after July 1, 2024 should be report to United Heartland.

Why the change?

Over the past few years, the Participants' Indemnity Plan has sustained high workers' compensation claims from members across the Plan. The high losses incurred have resulted in our past provider, Church Mutual, not renewing our workers' compensation insurance for the fiscal year beginning July 1, 2024. The two largest high claims areas are school staff and maintenance staff.

Let's reduce workplace injuries

United Heartland will be working with the Archdiocese and Catholic Mutual to help reduce work related injuries by conducting site assessments along with CMG, providing safety trainings and ergonomic assessments, and conducting accident investigations as necessary.

Filing a claim

To file a claim, call 1-888-881-8242 and press option #1. Provide United Heartland Policy Number #1400023881 to the intake attendant. For more information, go to [Workers' Compensation Procedures \(archmil.org\)](#). This site will be updated as additional features are added.

3rd Annual HR Leadership Seminar

Wednesday, October 23, 2024, 1:30-4:00pm
MMCP

Registration closes Friday, October 18: <https://archmil.regfox.com/hr-seminar-oct-2024>

This year's topic is Conflict Resolution and Performance Management. There will be breakout sessions designed specifically for pastors, business managers, and school leadership.

Resetting Communications between Schools and Parishes for the New School Year

With FY 2024-25 budgets approved and the new school year in full swing, now is the perfect time for pastors, principals, and DASs/Business Managers to schedule monthly meetings to review parish school financial performance. During these meetings, the DAS/Business Manager should present the school's income statement compared to budget, and the principal should provide input for variance between budget and actual numbers. This is also a good time to discuss staffing or enrollment changes that may impact future financials.

When doing these reviews, it may be helpful to use Key Performance Indicators (KPIs). A KPI is a metric used to measure an organization's long-term performance. By tracking KPIs each month, leadership can easily note trends in performance. The DAS/Business Manager should chart the budgeted revenue per budgeted student and the budgeted expense per budgeted student for each month in the year. With each month close, the actual revenue per actual student and the actual expense per actual student should be added to the chart. This is an easy way to visually check the financial performance of the school. If the KPI trend is unfavorable for two consecutive months, the pastor, principal, and DAS/Business Manager can spend time during this monthly meeting to develop a plan to improve performance.

Upcoming Microsoft Teams Webinars

Please watch for upcoming emails with dates, times, and registration links for training. Anticipated topics for October and November include Employee Benefits and PIPIT (Risk Management).

Recorded training sessions and presentations, if available, may be viewed here: [Parish Training \(archmil.org\)](#)

Reporting Misconduct

The Archdiocese of Milwaukee offers online and phone methods of reporting misconduct. Please make sure that all new employees, key volunteers who work with children or vulnerable adults, and key volunteers involved with handling money (ushers, money counters, etc.) are aware of the options available for reporting misconduct. It is a best practice to remind all employees and key volunteers of these options at least annually.

There is a link to "Report Misconduct" at the bottom of the [Archdiocese of Milwaukee \(archmil.org\)](#) website.

Options to report misconduct:

[Report Misconduct \(archmil.org\)](#)

Call: 800 461-9330 | Text: 414 348-4261

Salary Survey Status Update

Thank you to the over 150 parishes and schools that participated in the 2024-2025 Parish and School Salary Survey! We are currently in the data analysis phase. If you are contacted with a question about the data you submitted, please respond in a timely manner. Participating organizations will receive the final report in October.

Trunk or Treating

Please review the new Safe Environment policy for "Trunk or Treat," a popular event at parishes and schools:

[2024 Safe Environment Trunk or Treat.pdf - Google Drive](#)

Parish and School Policy Manual Updates

In August 2024, the Office for Schools released an updated Parish and School Policy Manual. The updated manual is linked below. Please note that some of the links and forms in the policy manual are still being updated. The Office for Schools will send a communication once the finalized forms and links have been uploaded.

2024 Policy Manual:

<https://www.archmil.org/CentersofExcellence/DOCsPDFs/Schools-Policy-Handbook/Parish-and-School-Policy-Manual-2024-25.pdf>

Catholic Mutual Group Milwaukee Service Office

Catholic Mutual Group's coverages and policies apply only to those entities participating in the Participants' Indemnity Plan ("PIP" or "PIPIT").

Catholic Mutual Group publishes a quarterly on-line newsletter, [Catholic Mutual Connection](#), which focuses on timely loss prevention and safety topics. It is found on the [Catholic Mutual website](#) under *Newsletters*.

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1. Requests relating to claims, risk management, contract review and coverage should be directed to Kevin or Suzanne.
2. Requests for certificates of insurance, applications for Special Events Coverage, and driver record requests will be processed primarily by Chong Vue.
3. Requests for certificates of insurance, applications for special events coverage, accident reports and other general questions can be emailed to milwaukeeoffice@catholicmutual.org. This email is monitored by all office staff, so there is no concern that a single individual is out of the office.

Reminder: Many risk management and claims policies and forms are found on the Catholic Mutual Group website www.catholicmutual.org, under the *My Diocese* tab.

Member Login* User: 0065mil

Password: service

**Please Note: This is different from your CMG Connect account*

Check Issuing Guidelines

A gentle reminder that if you are submitting a check to the Archdiocese of Milwaukee, please make certain that it is clear what the check is for, for example, by using the memo line of the check.

Several different payment types are remitted to the same PO Box. Some parishes have had payments applied to the incorrect debt.

[CheckIssuingGuidelinesrev2023.04.01.pdf \(archmil.org\)](#)

Multi-Parish Management (MPM) Territories

As of July 2024, five new MPM Territories were created. A MPM Territory is two or more parishes that share one pastor. Each parish retains its own legal identity, EIN, etc. Each parish must have its own trustees and finance council.

The new MPM Territories and their pastors are:

- 1) Dodge West
Fr Will Arnold
- 2) Dodge East
Fr Nathaniel Miniatt
- 3) Dodge SE
Fr Britto Suresh
- 4) Racine SE
Fr Juan Camacho
- 5) Racine NW
Fr Thomas Vathappallil

Mass Stipends Accounting

A reminder that every parish should have a separate checking account for stipend and stole fees. The checking account should be named with the parish name followed by "Stipend and Stole Fees."

For example, "St. Adelina – Stipend and Stole Fees."

As with other parish accounts, there should be three people who may sign for this account:

1. The Pastor / Parish Administrator / Parish Director
2. Trustee – Secretary
3. Trustee – Treasurer

Amounts received as Mass intention donations should be deposited into this checking account. Because the funds are not earned until the Mass intention is fulfilled, a liability must be set up on the balance sheet. This liability account indicates that the parish does not "own" the funds but is holding the funds until the Mass intention obligations are fulfilled.

Example: Entry when Mass intentions are received; 30 Masses were requested for the future= $30 * 20 = \$600$

	Account #	Account Name	Amount Dr	Amount Cr
Entry for Parish collection of Mass Stipends throughout the month				
Dr.	1011	Cash- Stipends	\$600	
	Cr.	2090	Other Current Liabilities	\$600

During the month of July 50 masses were fulfilled. 30 at \$10 and 20 at \$20 = \$700

At the end of July St. Adelina would then record income and transfer cash				
Dr.	2090	Other Current Liabilities	\$700	
	Cr.	3080	Mass Stipends & Sole Fees	\$700
Dr.	1010	Parish General Checking	\$700	
	Cr.	1011	Cash- Stipends	\$700

If the priest who earned the Mass stipend elected to collect individual stipends, the parish should send a check to the priest for the stipends earned that month.

Example: Fr. Joe takes Mass Stipends and fulfilled 20 masses during July. eight at \$10 and twelve at \$20.

Check written to Priest taking Stipends				
Dr.	2090	Other Current Liabilities	\$320	
	Cr.	1010	Parish General Checking	\$320

The Parish would get the Stipends for the masses fulfilled by Priests taking the stipend offset.

At the end of July St. Adelina would then record income and transfer cash				
Dr.	2090	Other Current Liabilities	\$380	
	Cr.	3080	Mass Stipends & Sole Fees	\$380
Dr.	1010	Parish General Checking	\$380	
	Cr.	1011	Cash- Stipends	\$380

As a reminder, if there are more than one intention for a Mass, the stipends for the additional intentions should be remitted to the Archdiocese of Milwaukee, ATTN: Chancery, PO Box 070912, Milwaukee, WI 53207-0912.

Contacts

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For new HR inquiries, please contact:

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or 414-389-88HR(47)

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Cindy Lukowitz
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Checks from the Archdiocese of Milwaukee

If your parish receives a check from the Archdiocese of Milwaukee and you have questions about it, please contact our Accounts Payable team at: accountspayable@archmil.org.