

Funny You Should Ask...



A NEWSLETTER FROM PARISH & SCHOOL FINANCIAL CONSULTING · ARCHDIOCESE of MILWAUKEE

March 2024 --- volume 13, issue 1

This newsletter is sent electronically to parish and school directors of administrative services, business managers and bookkeepers. If you have suggestions for topics, please [let us know](#).

[View the *Funny you should ask...* page](#) on our website.

Featured Topics:

New Parish Finance Director – Welcome Rob Kratoska

Farewell Denise Montpas

St. Raphael Health Plan (SRHP) News

Pre-Employment Physicals

IRS Mileage Rate

Property Tax Exemption Reports (PC220)

Nonprofit Security Grant Program

Budget Information

Signing Parish Contracts

Updated School Contract Language

School Contract Non-Renewal Schedule

Safe Environment Updates

CRS Rice Bowl – New Address

Good Friday/Holy Land Collection

Cash vs. Accrual Accounting

Raffles

The Regular Fare:

How Do I Make That Check Payable?

Cyber Scams and Phishing

BAAM Schedule

Building Commission Schedule

Catholic Mutual Corner/PIPIT

The Quarter Ahead

Resources

Contact Us

Welcome Rob Kratoska!

Please join us in welcoming Rob Kratoska to the Parish & School Financial Consulting Office. Most recently, she was finance director at SSM Health, supporting St Agnes Hospital in Fond du Lac, Waupun Memorial Hospital, and Ripon Community Hospital.



Rob currently lives in Fond du Lac and is a member of Holy Family Catholic Community; however, she will be relocating to Wauwatosa later this spring. A long time ago, Rob also attended grade school at St Bernadette in Milwaukee and St Cecilia & St James (now Christi Lumen in Mequon). She volunteers as an adult bible study teacher at Holy Family, and was a Eucharistic Minister at St Agnes Hospital. She looks forward to getting to know you.

You can reach Rob at kratoskar@archmil.org or 414-769-3377.

Farewell Denise Montpas

Denise Montpas announced at the BAAM meeting on January 17, that she would be leaving her position at the Archdiocese. Her last day will be April 5.

Denise wanted to share the following message: “A few years ago, I began reflecting on where my next chapter would lead. I knew that I wanted to be home more for my family, enjoy my time as a mom, and soak up every moment as my children grow. I determined this would require a pause in my career. Please be happy for me. You all have a special place in my heart and I feel like working here has been a blessing in my life. I will miss all of my wonderful business managers, colleagues and friends so very much. Your generosity and kindness have been an inspiration to me. Thank you for everything you do!”

St. Raphael Health Plan (SRHP) News

As we move the St Raphael Health Plan to a calendar year administration, we must have two open enrollment periods this year. We will have a PASSIVE open enrollment in May, May 15-29, for a July 1 effective date. There will be no product or rate changes at this time. If your employees are happy with their current coverage, they do not have to participate in this open enrollment.

Our second open enrollment will be held in the fall (dates TBD) and it will be an ACTIVE enrollment (more information to follow).

Please ensure all your benefits-eligible employees have verified their emails in [MyEnroll.com](https://myenroll.com) and set up a username and password to access the platform. To check, login to [MyEnroll.com](https://myenroll.com), select Menus, then Reports. Under Census Reports select Census Report with Pending Emails. For those employees who have not yet verified their emails, re-enter their email under Contacts, and the system will generate another series of prompts for them. Please let them know the verification email is coming from Security@MyEnroll.com.

Pre-Employment Physicals

Post-Offer/Pre-Employment Physical Program for Parishes and Schools with Concentra

for Maintenance and Custodian Positions

The Archdiocese of Milwaukee and Catholic Mutual established several years ago a post-offer/pre-employment physical program for maintenance and custodian positions in the parishes and schools. The purpose of the program is to assist parishes and schools in hiring individuals who are physically capable of safely performing the essential functions of the positions. Our medical partner in the program recently changed to Concentra (occupational health provider). Concentra has numerous metro Milwaukee locations that can provide exam services to serve the entire Archdiocese of Milwaukee.

The backbone of the program is using the ADA Compliant Job Descriptions for maintenance and custodian hires, which were drafted by HR/ Physical Therapists/Legal professionals after thorough job shadowing of individuals working in those positions. **ALL PARISHES AND SCHOOLS SHOULD USE THESE JOB DESCRIPTIONS FOR EMPLOYEES WORKING IN [MAINTENANCE](#) AND [CUSTODIAN](#).** The ADA compliant job descriptions are formatted to allow the employer to select from a thorough listing of Job Tasks and it is acceptable to add a task to the document if there is an essential task that is not listed.

[Addendum to Employment Application](#)
[Addendum to Employment Application\(Spanish\)](#)

The cost of the post-offer/pre-employment physical is paid by Archdiocese of Milwaukee Participant's Indemnity Program (PIPIT) and the Catholic Mutual Group Milwaukee Service Office administers the program.

With the change to Concentra, [the process to arrange the physical exam has also changed](#).

Please contact Molly Hatfield at 262-255-6906 with any questions. Thank you.

IRS Mileage Rate for 2024

The [IRS standard mileage rate for 2024](#) increased to \$0.67 cents per mile effective January 1, 2024. Business mileage may be reimbursed at that rate or less without inclusion on an employee's W-2. The IRS may make changes mid-year. We will send out a broadcast if that happens. You may also learn of a mid-year rate change in the general media.

Also note that help-out priests are always paid at the IRS maximum rate, even if your employer chooses a lesser amount.

Property Tax Exemption Reports (PC220)

In the new year, you should receive the TAX EXEMPTION REPORT FOR 2024 forms PC-220 and/or PC-220A from the taxation district clerk in which your tax-exempt property is located. Section 70.337(6) of the State Statutes requires owners of tax-exempt real property, including church and church related properties, to complete and **file this report by March 31** of each even numbered year.

If you do not receive the reporting form, please contact your taxation district clerk because **the burden of filing rests with the property holder**. Failure to file will require the taxation district

clerk to have the property appraised by either the district assessor or a person hired by the district to conduct the appraisal, **at the owner's expense.**

You may complete the forms (or print blank forms) online by using the links below. Completed forms must be printed and mailed to your taxation district. These forms are NOT filed on-line.

Form PC-220: <https://www.revenue.wi.gov/DORForms/pc-220f.pdf>

Form PC-220A: <https://www.revenue.wi.gov/DORForms/pc-220af.pdf>

Additional instructions for completing these forms are found [at this link](#).

Please send a copy of your completed form to the Archdiocesan Office of Financial Services via email (wrights@archmil.org) or mail (PO Box 070912, Milwaukee, WI 53207-0912).

Nonprofit Security Grant Program

The FY2024 FEMA's Nonprofit Security Grant Program (NSGP) Notice of Funding Opportunity has not been released yet. It is expected anytime between now and mid-April. We will provide notice as soon as we are aware of the release and provide further information at that time.

FAQ's from the FY2023 Grant period are posted on the [FEMA website](#). The [Secure Community Network website](#) also contains helpful information to be used in consideration of this Program. Included below are a few other FAQ's from the latest Secure Community Network newsletter.

Additional FAQ's

- Can an organization apply directly to FEMA for an NSGP grant? *Nonprofit organizations must apply directly to their SAA (State Administrative Agency), not FEMA.*
- Can an organization apply for the FY2024 NSGP if it was awarded in FY2023? *All eligible 501(c)(3) nonprofit organizations are eligible to apply each year for the NSGP grant application, regardless of application status from a prior year.*
- How long is a Threat, Vulnerability, and Risk Assessment valid? *A Threat, Vulnerability, and Risk Assessment (TVRA) is generally valid for up to 36 months. The TVRA must identify and support all the vulnerabilities that will be requested in the application.*
- Should nonprofit organizations submit proposals or quotes for requested projects with the grant application? *Proposals/quotes should not be submitted with the application. Reliable and comprehensive cost estimates are sufficient for your application. Please be sure to include a 10-15% cost allowance to reflect increased costs in labor and materials.*

Security Risk Assessment

There needs to be a security risk assessment completed to identify any threats, vulnerabilities, and potential consequences for parish campus / building may face. This assessment, which does need to be submitted with the investment justification (grant application) will need to support your specific requests for funding. For example, if the assessment identifies the main entry doors to the church as a vulnerability but indicates the windows of the church to not be a vulnerability due to their height from the ground, it would be appropriate to submit for funding to replace the doors but not appropriate to request funding to cover the windows with shatter-resistant film.

The investment justification will also require a degree of accuracy in price. Building on the example above, the request could be to "replace existing main church doors with 4 steel framed, steel core doors with no more than 50% glass (shatter resistant) at a cost of \$7500 per door" and not "replace the main church doors for \$40,000". The accuracy will help your application score.

Timing

If your parish has not begun the process of the security risk assessment and the accumulation of quotes, it may be a better option to plan to submit next year rather than this year. We do expect the grant program to be authorized for FY2025.

If you have any questions, please contact Bruce Varick, Associate Superintendent for Schools at varickb@archmil.org.

Parish & School Budget Update

All parishes and schools in the Archdiocese of Milwaukee are required to prepare and submit an annual budget package to the Office of Parish and School Financial Consulting.

1. Submission Package and Deadline

- Balanced budget packages are due **June 17, 2024**
- Deficit budget packages are due **May 15, 2024**
- All budget submissions must include:
 - Budgeted Income Statement for 2024-2025
 - Current fiscal year-to-date Income Statement compared to the budget through February 2024 (or later)
 - [Completed Budget Submission Form](#)
- In addition to the above items, all deficit budget submissions must include:
 - A written plan which describes why the parish or school has a deficit, how the budgeted cash shortfall will be satisfied and a plan detailing how the parish will recover from the budgeted deficit situation in subsequent years
 - Balance Sheet through February 2024 (or later)

2. Budget Assumptions

- Assessment:
 - Rate increases to 5.5% for revenue earned during the 2023-2024 fiscal year
 - Reminder that the assessment will increase to 6% for income earned in 2024-2025 fiscal year
- Priest Compensation Program:
 - Gross compensation and annual supplemental payment will increase by 3.5%
 - The professional expense allowance will also increase by 3.5%, to \$7,385
 - Priest pension deduction will increase by 4.1%
 - The retreat allowance remains the same at \$550
 - The continuing education allowance will increase to \$1,100
 - Priest long term disability premiums will remain at \$396.50
 - The [2024-2025 workbook](#) is available online. As a reminder, you must be tagged and logged in as a Business Manager to view the compensation information.
- Priest Help-Out Compensation: Stole and stipend fees are set by the Wisconsin Catholic Bishops. The following amounts will remain the same as the current fiscal year.

- Weekend Masses - \$70 plus stipend and mileage
- Weekday Masses - \$50 plus stipend and mileage
- Reconciliation, Funeral Vigil, etc. - \$40 per session plus mileage
- St. Raphael Health Plan: The SRHP is a self-insured plan and is impacted by health care market increases, utilization of health care by our members (employees & dependents), prescription drug costs, and stop-loss insurance premiums. For your budgeting purposes please budget for the following rate increases:
 - Medical Insurance - 5% increase for both plans **effective January 1, 2025 (i.e. 2.5% annually)**
 - Dental Insurance – 5% increase (estimated)
 - Vision Insurance – 5% increase (estimated)
- Participants' Indemnity Plan: Catholic Mutual Relief Society of America (Catholic Mutual Group) has recently informed their member dioceses, including the Archdiocese of Milwaukee, of the state of the 2023 insurance market. The annual insurance renewal for PIPIT won't be complete until May or June of this year. For budgeting purposes, please plan:
 - PIPIT property, casualty, and liability premiums – 15% increase. (The actual increases may vary from this budget guidance.)
 - Workers compensation and auto insurance premiums – 15% increase. (The actual increases may vary from this budget guidance.)
- CUPP administrative fee will remain the same at \$17 per person
- School Choice: Per pupil aid for 2024-25 has been finalized. For budgeting purposes, please budget:
 - \$10,237 for students in grades K-8
 - \$12,731 for students in grades 9-12
- School Assessment (per student): The School Assessment has not been raised in a number of years. For 2024-25, the Assessment fees will increase by \$1.00 per student. Marketing and Professional Development will remain the same.
 - Elementary Schools:
 - Assessment Fee K3/K4/K5 - \$6.40
 - Assessment Fee Grades 1-8 - \$8.15
 - Marketing Fee - \$10.00 (no change)
 - Professional Development Fee - \$400/school (no change)
 - Secondary Schools:
 - Assessment Fee - \$8.50
 - Marketing Fee - \$11.00
 - Professional Development Fee - \$400/school (no change)
- Consideration of inflation should be given toward parish expenses and included in the operating budget. The Consumer Price Index (CPI) for January 2024 reflects a 3.1% increase over the last 12 months. CPI or another estimate of inflation may be used in budgeting parish expenses.
- The current IRS mileage rate is \$.67. Please note that this rate is subject to change at any time.

3. Other Budget Reminders

- Budgets may be submitted in the format in which they are prepared.

- Budgets should be submitted for operations and must include any capital expenditures paid out of operations or unrestricted savings.
- Restricted revenues and restricted expenses should **not** be included in the parish operating budget. Parishes should budget for these separately.
- The use of reserves cannot be budgeted as income. If your parish is in a deficit situation and the use of reserves is required to “balance the budget,” your parish must still submit a deficit budget.
- More information about parish budget preparation is contained in Section 4.0 of the [Parish Financial Management Manual](#).
- COVID-19 relief funds received through ERTC, EANS and other COVID-19 related assistance will not be subject to the Parish Assessment. As a reminder, accounting instructions are available in the [COVID-19 Relief Accounting Manual](#).

If you need any assistance with budgeting or any other finance-related topic, please don't hesitate to contact the Parish & School Finance Office at parishfinance@archmil.org.

Signing Parish Contracts – Policy 3446

As a reminder, parishes and schools should reference new Policy 3446: Authority to Sign Contracts in the [Parish and School Policy Manual](#) for guidance on authorized contract signers. For parishes, only the pastor/administrator/parish director has authority; for separately incorporated schools, only the chief administrative officer has authority.

Updated School Contract Language

In February, the Archdiocesan Office for Schools distributed updated 2024-2025 contract templates for principals, teachers and assistant administrators. Under The Parish/School as Employer Agrees clause #6 (teacher contract) and clause #8 (principal and assistant administrator) the term "probationary" was eliminated. Additionally, Policy 4222: Principal Contracts was added. Notably, the principal contract now includes 261 contract days and a minimum of 15 vacation days not including paid holidays. Plan to adjust salary and expectations accordingly.

Please work in collaboration with principals and pastors to complete the contracts.

A link to each of these contracts may be found in Policy 4210 of the [Parish and School Policy Manual](#), or at <https://www.archmil.org/Resources-2.0/Contract-Forms.htm>.

The Schools Office may be contacted with any questions regarding school contract language.

School Contract Non-Renewal Schedule

It is time to begin preparations for the 2024 -2025 school year contracts. The Parish and Schools Policy Manual states that each parish/school is free to set its own dates for contract offers and contract signing, however, the archdiocese has set the established dates for contract non-renewal:

- School Administrators – April 1
- School Teachers – April 15

There has been some confusion over the probationary employee statement in both contracts. Under Both Parties Agree, # 1 - *That the first two one-year contracts with a parish/school are*

collectively deemed to constitute a two-year probationary period, and either contract can be terminated by the employer with or without cause at any time during such period.

Employees in a probationary period who are under performing deserve to know if their employment is in jeopardy. This should be communicated clearly and **must be documented**. An employee should receive a performance improvement plan or a written warning stating that their contract may not be renewed if the behavior or performance issues are not corrected. Some offenses may result in suspension or termination. Please see your handbook for a list of examples.

As a reminder, prior to taking an action that will result in a dismissal or termination (including a RIF and non-renewal of contract), **the employer must have sought and followed the advice of a qualified attorney or other professional that Catholic Mutual has approved**. Staff from the Archdiocese Human Resources Office have been approved.

The following Society of Human Resources Management (SHRM) article addresses the question, “Is it less risky to terminate a new hire within his or her first 90 days or employment?”

No. A 60- or 90-day orientation period (aka, introductory period, training period or probationary period) does not provide additional protection from the risks associated with termination. For all terminations, employers should be able to articulate the reason for termination and show clear documentation to support this decision. Whether performance or conduct issues occur in the first few weeks after hire or months later, the need to document these issues is ongoing. State and federal employment laws still apply; there are no provisions in these laws that alleviate compliance during an introduction period.

Employers should address concerns about performance, attendance, or behavior early in the employment relationship. Overlooking problems may cause employees to believe their performance is acceptable, thus making later disciplinary action seem unfair, discriminatory, or retaliatory.

Prior to termination, employers should consider whether new hires have been given the appropriate training and resources to be successful as well as the opportunity to correct mistakes.

Safe Environment Updates

Safe Environment Week is coming up! This year, Safe Environment Week will be April 21-27, 2024. Please make sure of programming activities, intentions, bulletins, etc. ahead of time. Remember that you will have to report what was done for Safe Environment week in the Annual Compliance Report for your parish/school. The Safe Environment Week Resource Guide and the Compliance Report will be sent out once they are approved.

There is **no change** to the normal Safe Environment certification process for employees or volunteers. However, an email was sent on 2/22 by Fr. Nathan Reesman to all clergy members (priest and deacons) with instructions for clergy to complete the Renewal Certification Curriculum on CMG Connect AND take an in-person session. Going forward, clergy will complete the same renewal curriculum as employees and volunteers on CMG Connect.

Catholic Relief Services Rice Bowl—Donation Processing

Thank you for your continued support of Catholic Relief Services (CRS) Rice Bowl. Your contributions help support projects that assist those in need overseas and locally in the Archdiocese of Milwaukee.

Remember to keep your local 25% and use the funds to support local poverty and hunger alleviation programs in your local area.

For the remaining 75%, send a check made payable to the **ARCHDIOCESE OF MILWAUKEE**. Put on the memo line: CRS RICE BOWL (75%). Send it to:

ARCHDIOCESE OF MILWAUKEE
ATTN: CRS RICE BOWL
PO BOX 070912
MILWAUKEE WI 53207-0912

Please encourage individuals to make all checks payable to their Parish/School. Then the Parish/School will send one check for the CRS Rice Bowl funds. **Please do not combine any other funds from other collections.**



If you do receive checks made payable to CRS:

- Be sure to include those checks in your reporting of the overall total collected.
- Please mail those checks to:

CATHOLIC RELIEF SERVICES
ATTN: CRS RICE BOWL
PO BOX 5200
HARLAN IA 51593-0700

Finally, we ask all those participating to please submit a completed [25% Designation Form and Participation Report](#). This helps us track and report participation and local recipients to CRS.

The deadline to submit your completed designation & participation form and CRS Rice Bowl funds is **June 30**.

Feel free to contact the Archdiocese with any questions regarding the CRS Rice Bowl campaign. (e.g.: *Questions about the twenty-five percent (25%) local distribution; How do I change the contact information for our location?*)

Jim Trzebiatowski • (414) 758-2224 • trzebiatowski@archmil.org

Susan McNeil • (414) 758-2214 • mcneils@archmil.org

Thank you again for participating in the CRS Rice Bowl campaign this Lenten season!

Good Friday/Holy Land Collection

The collection on Good Friday is for the care and maintenance of Holy Land sites. Proceeds from this collection should be sent in a timely manner to:

Archdiocese of Milwaukee
PO Box 070912
Milwaukee, WI 53207-0912

Checks should be made payable to the Archdiocese of Milwaukee and should be noted "Holy Land Collection."

Cash versus Accrual Accounting

In order to achieve the goal of consistent financial accountability, it is necessary to establish standards for accounting practices. There are two general methods of recording financial transactions: the cash basis method, and the accrual basis method.

The cash basis is a method which records revenues and expenditures (income and expenses) when the revenue is received and the expenditures are paid, without regard to the period to which they apply. Cash basis is a simpler method of accounting.

The accrual basis of accounting records revenues and expenditures in the period of time in which the transaction takes place or occurs, without regard to the date of the receipt or payment. The accrual method is more complex and requires a higher level of financial oversight.

The Archdiocese of Milwaukee requires a blended method of accounting that is more "cash oriented." All revenue and expenditures must be reported during the year under the cash method. However, the year-end financial report must include a recording of outstanding accounts receivable (i.e., tuition) and accounts payable. In most parishes, the year-end transactions are quite simple and only require the recognition of receivable and accounts payable. If your parish has a school, you should also establish a liability account to recognize the portion of teachers' contracts that are earned but not yet paid.

Under the Archdiocesan method of accounting, revenue items like bequests, fundraisers and donations must be reported as income when the parish receives the corresponding cash. It is not appropriate to "defer" revenue that is received to a different fiscal period. Likewise, expenses must be reported when the funds are disbursed. Capital purchases like a roof or parking lot must be expensed in the period in which those projects were paid for. It is not appropriate to "pre-expense" a transaction.

As an example, St. Mary Parish received a large unrestricted bequest of \$600,000 in March of 2023. The Pastor discussed the gift with both the Finance Council and the Pastoral Council. They decided to use \$400,000 of the bequest for a parking lot project next fiscal year and the remaining \$200,000 will be used for operating purposes. The correct accounting for this transaction is:

March 2023

DR: 1010 Cash - \$600,000

CR: 3050 Unrestricted Bequest Income - \$600,000

*Note that all of the revenue is booked in the fiscal period in which the bequest was received.

The parish will probably show a significant profit in the 2020-2021 fiscal year because all of the revenue was recognized and there are no offsetting expenses.

September 2023 (to record the parking lot project)

DR: 4740 Capital Expense - \$400,000

CR: 1010 Cash - \$400,000

Raffles

As parishes prepare for festivals and large fundraising events, one of the decisions they often consider is whether to hold a raffle. Parishes must obtain an appropriate raffle license from the state of Wisconsin in order to hold a raffle and follow all rules and regulations of the Division of Gaming's Office of Charitable Gaming, which are provided in Chapter 563 of the Wisconsin Statutes. A list of [Frequently Asked Questions](#) is available on the [Division of Gaming website](#).

Why Online Raffles are not Permitted under Wisconsin Law

The state's raffle statutes were drafted before the Internet revolution and the current prevalence of online ticket sales for events other than raffles. As a result, the statutes do not expressly address online raffles. It is the Division of Gaming's position that online raffles are not permitted under Wisconsin law.

Any online raffle would face a number of significant legal obstacles, including how to ensure that: (i) the licensee remains a "local organization," as required by Wis. Stat. § 563.907(2); (ii) all raffle tickets are "identical in form," as required by Wis. Stat. § 563.93(1m) and 563.935(1); (iii) the licensee provides the purchaser their portion of the ticket, as required by Wis. Stat. § 563.93(2g)(c); and (iv) all drawings are held "in public," as required by Wis. Stat. §§ 563.93(2g)(d) and 563.935(5).

The statutes also require that the drawing method is a "random selection of a ticket portion or calendar portion from a container housing portions of all tickets or calendars purchased for the selection" as defined by Wis. Stat. §§ 563.03(5r)(a). For multiple-container raffles (commonly known as a bucket raffle), the statutes require "the ticket purchaser places his or her ticket in the container of his or her choice," Wis. Stat. §§ 563.03(10m)(c). Other drawing methods such as random number generators are not permitted.

Permitting online raffles, with its potential to dramatically expand the scope and sophistication of raffles, also could be viewed as violating the requirement of Wis. Stat. § 563.02(2) that raffles be "regulated as to discourage commercialization." As a result, the Division does not permit licensees to conduct online raffles.

Note that it is permissible to advertise and promote your raffle on the internet, you just cannot provide a means to purchase tickets.

The Regular Fare

How Do I Make That Check Payable?

The [Check Issuing Guidelines](#) revised April 1, 2023.

Cyber Scams and Phishing

From the KnowBe4 Team:

If you're known to dabble in a little online browsing, odds are you've encountered a pop-up once or twice. There are times when a user may think, "Wow, that's a great deal!" and click on a pop-up. To those users: put down the mouse. Why? That pop-up could be malicious or dangerous.

There used to be a time when malicious pop-ups were only on questionable sites, but those days are gone. Hackers are smart and develop ways to inject malicious malware into pop-ups and online advertisements - even on the most trusted sites.

One of the most common attacks we see occurs when you visit a site and a pop-up appears that says, "Your computer is infected! Download our antivirus now!" If you click on this, a bogus virus scan will start. After the "scan" completes, you'll be asked to pay for a full-version of the software or to call a helpline to connect with a support representative.

Spoiler alert: The software is not real, and the fake support representative will take control of your computer to try and "fix" the issue but end up causing more damage.

HOW TO PREVENT POP-UP ATTACKS

Although hackers are smart, you can be smarter. Here are some tips to protect yourself from these types of attacks:

- Avoid clicking on pop-ups.
- Update your operating system regularly - don't postpone or snooze updates!
- Use web-filtering software to warn you before accessing potentially harmful sites.

Remember, these attacks are only successful if we fall for them. Stay alert and be cautious!

[Cyber Incident Reporting](#) is a useful, one page tool to keep handy. We recommend printing this and having it readily available to walk you through the appropriate reporting protocol in the event of a cyber incident. If you have a cyber incident, contact Catholic Mutual immediately at 262-255-6906.

Scam and Fraud Resources

[Federal Trade Commission Consumer Information](#)

[Consumer Affairs](#)

[Identity Theft Resource Center](#)

[USA.gov – Reporting Scams](#)

[Clark Howard advice on scams and other fraud](#)

[Fraud.org](#)

BAAM Schedule

Meetings 9:00 a.m. – noon, at Our Lady of Lourdes, 3722 S. 58th Street, Milwaukee

2024 Upcoming Schedule

April 17, 2024 - BAAM Retreat at Lumen Christi Parish, Mequon

May 15, 2024

Building Commission

Building Commission attendance is currently by appointment only. Contact [Jane Ore](#) (414-769-3340) for more information.

2023-2024 Upcoming Schedule

April 11, 2024

June 13, 2024

August 8, 2024

October 10, 2024

December 5, 2024

Catholic Mutual Corner/PIPIT

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*.

Information and forms specific to locations within the Archdiocese of Milwaukee are located on the [Catholic Mutual website](#). You must log in to access this information. The Archdiocese of Milwaukee username is *0065mil* and the password is *service*.

Questions about the Catholic Mutual Group website or specific articles in the newsletter can be directed to the Catholic Mutual Milwaukee Service Office at 262-255-6906.

PIPIT Mandatory Trainings – recertify annually

[Workplace Safety Training end user instructions](#). Read the [Workplace Safety Training Mandate](#).
[Cyber Security Training end user instructions](#). Read the [Cyber Security Training Mandate](#).

The Quarter Ahead

March 2024

- 1 – Third payment due on current year assessment
- 1 – Deadline for filing Wisconsin PR-230, Property Tax Exemption Request to convert a property from taxable to tax exempt
- 8 – Deadline for returning annual Workers' Comp Data Request
- 31 – Deadline for filing Wisconsin PC-220 Property Tax Exemption Report to maintain property tax exempt status
- 31 – Deadline for electronic filing of [ACA Reporting Forms 1094-C and 1095-C](#) (if mailing, deadline was February 29)
- 31 – Quarter End

April 2024

- 11 – Building Commission
- 15 – Present budget to Finance Council for discussion and recommendation for approval
- 17 – BAAM retreat at Lumen Christi Parish, Mequon
- 29 – Safe Environment Mass of Atonement at Holy Apostles, New Berlin
- 30 – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 3/31
- Lay pension reports for Jan-Mar (Q1) distributed

May 2024

- 15 – Submit deficit budgets to [Parish & School Financial Consulting Office](#) for review
- 15 – BAAM meeting
- Lay pension information and payment for Q1 calendar year due
- Finance Committee to present balanced budget to Pastoral Council for review

June 2024

- 13 – Building Commission
- 15 – Priest compensation form due to employer
- 15 – Submit balanced budgets to [Parish & School Financial Consulting Office](#) for review
- 30 – Fiscal Year Ends
- 30 – Final payments for assessment, priest pension, and PIPIT due for fiscal year

Resources

[CUPP Website \(email: \[cuppwi@madisondiocese.org\]\(mailto:cuppwi@madisondiocese.org\) \)](#)

[IRS Form 8822-B for Change of Address or Responsible Party.](#)

[Rectory Lease Template – for Priests](#)

[Rectory Lease Template – for Non-Priests](#)

[Employee Assistance Program](#)

Contact Us

parishfinance@archmil.org

Mailing address:

PO Box 070912

Milwaukee, WI 53207-0912

Rob Kratoska, CPA, CMA

Director of Finance

Parish & School Financial Consulting

kratoskar@archmil.org

414-769-3377

Michael Waddell, Parish Finance Consultant

Parish & School Financial Consulting

waddellm@archmil.org

414-769-3335

Kim Kasten

Treasury Analyst

kastenk@archmil.org

414-769-3326

Samantha Wright

Administrative Assistant

wrights@archmil.org

414-769-3327

Janice O'Connor

Lay Pension Coordinator

oconnorj@archmil.org

414-769-3317

Rachel Uchytel

Parish and School Human Resources

uchytilr@archmil.org

414-769-3356

Maureen Wurster

HR and Benefits Administrator

wursterm@archmil.org

414-769-3423

Sofia Thorn

Victim Assistance Coordinator

thorns@archmil.org

414-769-3332

Cynthia Rivera-Garcia

Safe Environment Program Manager

rivera-garcia@archmil.org

414-769-3449

Donna Steffan

Priest Pension Billing

steffand@archmil.org

414-769-3318

Sharon Hanson

Archbishop's General Counsel

hansons@archmil.org

414-769-3379

Chris Brown, Treasurer and CFO

Office for Finance & Administration

brownc@archmil.org

414-769-3325