

## **Funny you should ask...**

*Newsletter from Parish & School Financial Consulting, Archdiocese of Milwaukee  
June 5, 2016 --- volume 5, issue 2*

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

[Click here](#) to view the *Funny you should ask...* page on our website.

### **Featured Topics:**

**Parish & School Financial Consulting Office**  
**Safe Environment & Catholic Mutual Training Videos**  
**Casino Fundraiser**  
**Good Friday/Holy Land Collection**  
**Unclaimed Property**

### **The regular fare:**

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### **Parish & School Financial Consulting Office**

On May 2, 2016, we welcomed Brian Ammerman as Director of the Office of Parish and School Financial Consulting. He has replaced Jay Frymark. Brian's phone number is 414-769-3336 and his email is [ammermanb@archmil.org](mailto:ammermanb@archmil.org).

### **Safe Environment & Catholic Mutual Training Videos**

Catholic Mutual Group has developed a new software platform that will combine and replace the platforms currently being used for the Archdiocese of Milwaukee's Safe Environment Program and Catholic Mutual training videos including BE SMART DRIVE SAFE, as well as transportation, safety, and business best practices videos.

The new CMG Connect platform will be live on July 1, 2016. **The existing platforms will be down from June 23 through June 30** to facilitate the transition. Do not schedule any training sessions during this time.

Patti Loehrer, the Archdiocesan Safe Environment Coordinator, sent out an email on June 6<sup>th</sup> with additional details on the new safe environment training platform and two scheduled WebEx events. Please have your Safe Environment Coordinator check their email for this important message.

## Casino Fundraiser

Recently, the Office of Parish & School Financial Consulting was asked to provide guidance as to the legality of holding a “Casino Night.”

The federal Department of Justice (“DOJ”) is the agency which oversees the legality of gambling which is not otherwise allowable by statute in the State of Wisconsin.

Generally, only bingo and raffles are considered legal in the State of Wisconsin and then, only if sponsored by a qualified organization of religious, charitable, service, fraternal, veterans or otherwise tax exempt nature.

The fundamental issue in holding a fundraising event which will include casino-style or Las Vegas-style games will be to do so in a manner which is NOT considered gambling and, therefore, not illegal. There are three material components to gambling: consideration (cost to play), chance and prize. If you can eliminate just one of the three, the event will not be considered gambling. Obviously, the second two components will be virtually impossible to eliminate and still leave the event with much of a possibility of fundraising success. Virtually any game you offer will need to be based on chance and award of a prize to attract participation. So the key will be how you charge a cost to attend your event. We cannot provide legal advice but want to offer a few suggestions:

1. Try to make the gaming aspect of your event “secondary” in importance. For example, have a buffet and sell tickets to the dinner with playing the games not contingent on a separate fee;
2. Promote the gambling-like activities as “casino-style” or “Las Vegas-style;”
3. Include a base level of chips along with the purchase of a ticket to the buffet or event and do not use real US currency in the play of games;
4. Do not be restrictive with who can play by limiting players based on age or a specific cost to participate;
5. Play for fun. Have prizes be based on redemption of chips.

This type of fundraiser certainly is possible and there are businesses whose services you will likely wish to use to manage the games but be careful to promote the event properly to avoid it being interpreted as illegal gambling.

Good luck and do not hesitate to contact Brian (414-769-3336 or [ammermanb@archmil.org](mailto:ammermanb@archmil.org)) with any questions.

## Good Friday/Holy Land Collection

If you haven’t already done so, please send in your Good Friday collection for the Holy Land. Be sure to note ‘Holy Land’ or ‘Good Friday’ on the check/stub. Please do not combine this with any other items.

Checks should be made payable to “Archdiocese of Milwaukee” and mailed to:

Archdiocese of Milwaukee  
ATTN: Kim Kasten  
PO Box 070912  
Milwaukee, WI 53207-0912

100% of this collection is forwarded to the Commissariat of the Holy Land.

## Unclaimed Property

It's a good idea to check the [Unclaimed Property](#) for the State of Wisconsin on an annual basis. You may be surprised at what you find! Also, check under various spellings and common misspellings of your parish name. Look under 'Saint' as well as 'St.' when searching the site; also check any nicknames the parish may have. Claim forms are easily downloaded.

## BAAM Schedule

BAAM meetings are held at Our Lady of Lourdes parish (3722 S. 58<sup>th</sup> St., Milwaukee).

### 2016-2017

To be determined. Check BAAM website later in July for updates.

## Building Commission Schedule

Building Commission attendance by appointment only; contact Linda King at 414-769-3340.

### 2016

June 9

August 11

October 13

December 1

## Catholic Mutual Connection

[Click here](#) for the most recent Catholic Mutual Connection newsletter and other information from the Catholic Mutual website.

## The Quarter Ahead

### June 2016

- 1<sup>st</sup> – Final payments for assessment, property and liability insurance, priest pension due for fiscal year
- 9<sup>th</sup> - Building Commission Meeting. Attendance by appointment only. Contact [Linda King](#) (414-769-3340)
- 15<sup>th</sup> – Priest compensation form due to employer
- 15<sup>th</sup> – Submit balanced budgets to Archdiocese for review
- 30<sup>th</sup> – Fiscal Year Ends

### July 2016

- 1st – Fiscal Year Begins
- 1st – Confidential Financial Statement forms available
- 31st – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 6/30
- Lay pension and group life reports for April-June (2Q) mailed
- Continuing Formation for Clergy bills mailed

### August 2016

- 11<sup>th</sup> – Building Commission Meeting. Attendance by appointment only. Contact Linda King (414-769-3340)
- Lay pension and group life information and payment for 2Q calendar year due

## September 2016

- 1st – First payment due on current year assessment based on Confidential Financial Statement
- 15th – Confidential Financial Statements due
- 30th – Quarter End
- 18th – BAAM meeting
- Priest pension bills for both priest and parish portions mailed
- Check unclaimed property site <https://www.revenue.wi.gov/ucp/index.html>

## Index of *Funny You Should Ask...* Articles

The index is the first item on the [Funny page](#). It is a searchable Word document with links to take you to the appropriate issue. Just use CTL F (find) and type in your key word.

## Excel Tip

Ever try to cut and paste info, only to find after you done the 'cut' you forgot to insert a row for it to land? Try using "Insert Cut Cells." After you cut (Ctrl x), go to the line below where you want to insert the information, then use **Ctrl Shift =**. This will also remove the blank line from the source of the cut. If you have customized the ribbon in Excel and have added the icon for Insert Cells, that icon will change to "Insert Cut Cells" once you do the cut.

For more tips, try *ExcelTips*, a free, third party, email newsletter containing lots of tips on using Excel. To subscribe or just check it out, click this link. <http://www.tips.net/subservices.html>

Do you need an Excel tip or have one to share? [Let us know!](#)

## Contact Us

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