**Outstanding Items from November 10th – NBAI Session I**

HR Emergency Contact Form – a sample has been posted on the NBAI page on the Parish Finance landing page

Onboarding Checklist – the Archdiocese is working on a template. Dan Hansen offered to share his, feel free to contact him at St. Mary’s Parish in Hales Corners if you want to see his.

Contract Dates

The Parish and School Policy Manual, 4119.2 states:

*While each parish/school is free to set its own dates for contract offers and contract signing, the archdiocese has established the following dates for contract non-renewal.  School Administrators : April 1, and School Teachers: April 15.*

These dates were put into place to assist the administrator in anticipating needs for future school years. **I would use these dates as “no later than”.**

In addition, the administrators may request non-binding letters of intent from contracted staff before non-renewal notification deadlines. Decisions noted on the letter of intent should be supported by signed contracts or a resignation letter by the appropriate date.

Charitable Giving through payroll deductions

There are several advantages to contributing to charitable organizations through payroll deductions, but by far the most common is convenience. It is convenient for an employee to set up a payroll deduction and spread the donation over a period of time.

Note that there is no tax advantage, since these deductions must be made on a post-tax basis. An employee may receive a tax benefit by including the charitable contribution on his/her tax return, assuming the employee uses itemized deduction instead of the standard deduction.

Most payroll providers offer the ability for an employer to set up a deduction code, on the basis of either a $ amount or % amount per paycheck.

Here are some factors an employer should consider when introducing a policy on charitable contributions through payroll deduction:

* Which charities will employees be allowed to contribute toward?
	+ Note: The more charities allowed, the more checks the employer needs to cut to the charitable organizations.
	+ Note: Payroll provider may have limits to the number of allowable deduction codes utilized.
* What documentation will the employee sign to authorize the deduction?
	+ Does the employee provide authorization for the parish to disclose his/her name and address to the charitable organization?
* When will the employer turn over the funds to the charity?
	+ Examples: After each pay cycle, monthly within xx days, quarterly within xx days, etc.
* What requirement does the charitable organization have on the documentation included with the check? (And does the employee authorize the release of this information?)
* If the employee wants to change the deduction, or stop the deduction, what is the process/documentation for that?
* Will the employer provide any matching funds?
* Will the employer provide any separate tax documentation to the employee at the end of the year to summarize the contributions?
	+ IRS allows the W-2 to stand alone as proof of charitable contribution, so this is not required. However, it may be assumed by the employee that they will receive something.

Gift Acceptance Policy – the Archdiocese is in the process of developing a Gift Acceptance Policy for parishes. Parishes are encouraged to reach out to the Development Office for assistance in the meantime.