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## ACCOUNTING SERVICES

**Charity Gaming** Does your parish or agency conduct charity gaming events? Are you familiar with the charity gaming rules? The Indiana Gaming Commission website (<http://www.in.gov/igc/2339.htm>) is an excellent resource for charity gaming questions. We recommend that all parishes and agencies that conduct charity gaming events review this material to ensure compliance with the Indiana Gaming Commission rules and regulations.

**St. Francis Xavier Home Mission Grant 2010 Applications** The St. Francis Xavier Home Mission endowment fund was established in the name of our patron saint, St. Francis Xavier. The endowment is made up of monies collected over and above our parishes' Christ Our Hope appeal goal that parishes direct to Home Missions. The annual distributions from this endowment fund are allocated each year to home mission parishes and schools through an application process. A home mission parish or school is one with emergency needs that cannot make it on their own and are vital to the mission of the Church.

Applications for the July 2010 Home Mission Grant process are due to the Finance Office by Monday, May 17, 2010. Applications are available at <http://www.archindy.org/finance/index.html>. For further information, please contact Stacy Harris by e-mail at [sharris@archindy.org](mailto:sharris@archindy.org) or by phone at 317-236-1535 or 1-800-382-9836 ext. 1535.

**Budget Assistance** For any parish or school looking for assistance with their budget, please contact Mike Witka at [mwitka@archindy.org](mailto:mwitka@archindy.org).

**OAS Staff Changes** Central Payroll's LesLee Hill is out on leave. Brenda Ball will be working in Central Payroll during Leslee's leave. Please continue to contact payroll via email at [centralpayroll@archindy.org](mailto:centralpayroll@archindy.org).

**ADLF** The next ADLF meeting is Tuesday, **May 11, 2010**. If your parish would like to be placed on the agenda for this meeting, please contact Julie Laughlin by April 22<sup>nd</sup> at (317) 261-3371, 1-800-382-9836 ext. 3371 or [accountingservices@archindy.org](mailto:accountingservices@archindy.org).

### **ADLF Rates for April–June 2010**

Loans 3.50%

Deposits 1.0%

If you have any questions please contact the Office of Accounting Services at our email [accountingservices@archindy.org](mailto:accountingservices@archindy.org).

**2010-11 Budget Guidelines** The guidelines for 2010-11 are available on our website at <http://www.archindy.org/finance/parish/guidelines.html>.

The budgets may be mailed, e-mailed, or faxed and due by **June 15, 2010** to the Office of Accounting Services. Please also submit the signed and completed Budget Approval Form found in Appendix B. If you have any questions or require assistance with budget preparation, please contact the Office of Accounting Services at our email [accountingservices@archindy.org](mailto:accountingservices@archindy.org) or call 1-800-382-9836 Ext 1410 or 317-236-1410.

**Parish Annual Financial Report** For the fiscal year ending June 30, 2010, the Parish Annual Financial Reports will again be submitted using the online survey format. An e-mail link to the survey and instructions will be sent to the person at each parish that submitted the report last year. The instructions will **NOT** be sent by regular mail. All documents will be available online

The e-mail containing the link and the instructions will be sent out in June. If the contact has changed since the prior year, please email [accountingservices@archindy.org](mailto:accountingservices@archindy.org) to have the distribution list updated.

Please feel free to send these newsletters to your fellow co-workers who normally would not receive through Accounting Services. There is always valuable information that can be shared throughout your parish or agency.



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## ACCOUNTING SERVICES

**Whistleblower Policy** The Whistleblower Policy has been established to assist us in ensuring the funds we receive will benefit the people we serve and to protect our financial and physical assets from misuse. The policy which is located at <http://www.archindy.org/finance/parish/forms.html> describes the types of misuse and reportable conditions as well as how incidents can be reported. EthicsPoint Hotline, an independent company, allows concerns to be anonymously reported via a telephone call (1-888-393-6810) or via the internet by simply visiting the following website: [www.archdioceseofindianapolis.ethicspoint.com](http://www.archdioceseofindianapolis.ethicspoint.com).

We also encourage the policy to be posted around the parish, school and agency in places where employees and members gather.

**Job Posting** St. Elizabeth Coleman is seeking a part-time bookkeeper. If interested, please contact David Bethuram at [DBethuram@archindy.org](mailto:DBethuram@archindy.org)

## RISK MANAGEMENT

**Parish Self Inspections** We are ready to roll out our self inspection platform on the Archdiocesan website. This will be a way for parishes to complete their insurance inspection online. Each parish needs to provide a contact name and email address (Pastor, Office Manager, or Maintenance) to Mike Witka, Director of Risk Management at [mwitka@archindy.org](mailto:mwitka@archindy.org).

**Parish Insurance** Some parishes have raised the question of obtaining their own insurance. This is unnecessary as all parishes are covered under the Archdiocesan plan. If you have questions about your particular parish you may call Mike Witka, Director of Risk Management or email him at [mwitka@archindy.org](mailto:mwitka@archindy.org).

## HUMAN RESOURCES

**New Wellness Program** The Human Resources Office is sponsoring a new wellness program to promote and reward regular exercise. Employees and their spouses can receive free pedometers and win cash awards for miles completed. In May, there will be a team competition with additional cash awards. Please contact Human Resources for more information.

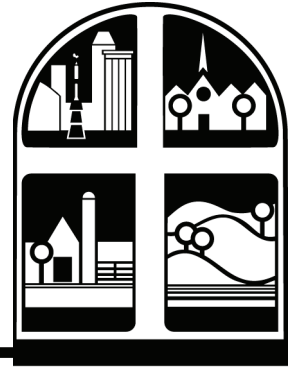
**2011 Health Plan** The Archdiocese will keep the same health plan design in 2011. There will be **no increase** to the premiums that employees pay or to their annual deductibles or out-of-pocket maximums. This is the second consecutive year that we have been able to maintain the same health plan and avoid cost increases.

## STEWARDSHIP

**Capital Campaign Procedures** With the Legacy for Our Mission capital campaign mostly behind us, a small number of parishes have indicated an interest in having a parish capital campaign to support either new construction or significant updating of their facilities. We remind you that there is a formal approval process that you should follow when undertaking such a project. The policy is designed to help you achieve success and is based on broad experience within the archdiocese. A copy of the approval policy is posted on the archdiocesan website ([www.archindy.org/stewardship/services.html](http://www.archindy.org/stewardship/services.html)). Please contact Kent Goffinet at the Office of Stewardship & Development when you begin considering such a project. The OSD staff will be happy to guide you through the process.

Send us your questions! Each month one or two questions will be addressed based on inquiries of the parishes.  
Please submit any questions you would like answered to [accountingservices@archindy.org](mailto:accountingservices@archindy.org).

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## INTERNAL CONTROL TIP OF THE MONTH

**Related Organizations** Related organizations play an important role in the ministry of parishes and schools. However, if not subject to proper controls, opportunities exist for misuse of funds. Examples of related organizations that are sponsored by the parish include, but are not limited to: Schools, cemeteries, CYO, PTO, athletic, non-gaming fundraising, men's/women's auxiliaries, all sodalities, etc. The following policies should be utilized:

- All related organization activity must be included in the parish operating account and must **not** have separate checking accounts.
- All policies listed in the sections above apply to all parish and school related organizations. Each should have a budget, approved and included with the parish or school operating budget, and all revenue and expenses should be reflected on the parish or school ledger.
- Chartered, independent organizations such as St Vincent de Paul or Knights of Columbus are not subject to the same controls as long as they are affiliated with and are reporting to a national or regional organization

## Q & A

**Q:** I have received a "Property Tax Reminder" from the County Assessor's Office. How are property taxes handled for the parishes and schools?

**A:** Parish and school properties are tax exempt. Helen Baar with the Office of Management Services files the necessary property tax forms for all of the parishes and schools each year. If you receive property tax information from the Assessor's Office, Auditor's Office or Treasurer's Office please contact Helen Baar at [hbaar@archindy.org](mailto:hbaar@archindy.org).