

Funny you should ask...

*Newsletter from Parish & School Financial Consulting, Archdiocese of Milwaukee
September 5, 2017 --- volume 6, issue 3*

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](#).

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

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Staffing Changes

We welcome Andy Dunn to the Office for Parish and School Financial Consulting. His first day was August 22. Andy's phone number is 414-769-3336 and his email is dunna@archmil.org.

Katie will be back in the office on September 11. She is currently responding to emails from home.

Priest Pension Billing

If you are a parish with a shared pastor and/or associate, or other shared configuration, please call (414-769-3318) or [email Barb Kissh](mailto:Barb.Kissh) to let her know where (and to whom, if necessary) to send both the Priest invoice and Parish invoice for the 2017/2018 Priest Pension billing. Barb's goal is to get them to the right address, the first time. Your assistance is greatly appreciated!

Catholic Mutual Updates

On August 31, Paul Martell retired from Catholic Mutual Group. We thank Paul for his years of excellent service to our Archdiocese.

Workers' compensation claims are now handled directly through Church Mutual Insurance Company (CMIC). Emails were sent to all participants in the Protected Self-Insurance Program. We learned today that the packets were mailed out late on Friday, September 1. For more information, click this link. <https://www.archmil.org/Resources/WorkersCompensation.htm>

Property Appraisals

All properties covered under the Protected Self-Insurance Program of the Archdiocese of Milwaukee will be appraised between the second week of September and the middle of December. Representatives from Specialty Property Appraisals (“SPA”) will be contacting each location to set up a day and time to perform the walk-through as well as take measurements and photos. It is anticipated that these visits will last anywhere from 2 to 4 hours, depending on the size and intricacy of your campus. A few of the larger locations may take longer.

On Friday, September 1, an email with the subject line “Important Notice from Protected Self-Insurance Program” was sent to you with more information.

If your location has a school that is in session at the time of this appointment, someone from the parish or school who has met all Safe Environment requirements must accompany the SPA representative for the duration of their visit.

Please contact Kim Kasten at 414-769-3326 or kastenk@archmil.org if you have any questions.

BAAM Schedule

Unless otherwise noted, BAAM meetings are held at Our Lady of Lourdes parish (3722 S. 58th St., Milwaukee).

2017-2018

9/20/2017

10/18/2017

11/15/2017

1/11/2018 – Gigs, Geeks and God

2/21/2018

3/21/2018

4/18/2018 – BAAM Retreat

5/16/2018

Building Commission Schedule

Building Commission attendance by appointment only; contact [Linda King](#) at 414-769-3340.

2017

October 12

December 7

2018

February 8

April 12

June 14

August 9

October 11

December 6

Catholic Mutual Connection

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

The Quarter Ahead

September 2017

- 1st – First payment due on current year assessment based on Confidential Financial Statement
- 15th – Confidential Financial Statements due
- 20th – BAAM meeting
- 30th – Quarter End
- Priest pension bills for both priest and parish portions mailed
- Protected Self-Insurance bills mailed
- Check unclaimed property site <https://www.revenue.wi.gov/ucp/index.html>

October 2017

- 12th – Building Commission Meeting. Attendance by appointment only. Contact Linda King (414-769-3340)
- 18th – BAAM Meeting
- 31st – Form 941 (Quarterly Payroll Reporting) due to IRS for quarter ended 9/30
- Lay pension reports for July-Sept (3Q) mailed

November 2017

- Assessment bills for current fiscal year mailed
- 15th – BAAM meeting
- Lay pension information and payment for 3Q calendar year due

December 2017

- 1st – Second payment due on current year assessment
- 7th – Building Commission Meeting. Attendance by appointment only. Contact Linda King (414-769-3340)
- 15th – Distribute budget information to staff and committees with budget responsibility
- 31st – Quarter End

Excel Tip

Looking for an easy way to modify the order of an entire column of information? Try using Flash Fill. For instance, you have a column listing names by *last name, first name* and you want to reverse that. In the column to the immediate right, in the first row, type the name in the *first name last name* order. Then click on the Data tab, and in the Data Tools section click Flash Fill. This will fill in the rest of the rows in the same pattern you entered on the first line. The result will look like this.

Smith, John	John Smith
Doe, Mary	Mary Doe
Duck, Donald	Donald Duck
Mouse, Minnie	Minnie Mouse

It also works the other way around (inserting the comma between *last name* and *first name*). There are a number of ways this tool is helpful; experiment with it!

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!](#)

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