

FINANCE TIMES

SPRING 2018

For Parishes, Schools and Cemeteries throughout the Diocese of Winona-Rochester

From the Desk of the Finance Officer

Andrew Brannon, CPA, Chief Finance & Administrative Officer • abrannon@dow.org

Well, as Bob Dylan once said, “The times they are a-changin’”. I’m sure by now that you have heard about the changes occurring within the Diocese. We have a new co-cathedral and a new name!



At the Chrism Mass on March 26th, Bishop John Quinn announced to the diocese that the Holy See approved the designation of St. John the Evangelist Church in Rochester as the co-cathedral of the diocese. With that change, the Holy See has also changed our name to the Diocese of Winona-Rochester. For the diocesan pastoral staff and for you the administrators and staff of parishes, schools and cemeteries, it is a time to pause and celebrate the dynamic Catholic life within our diocese. Having a co-cathedral recognizes the growing population in the region between Rochester and Mankato. Nearly three quarters of our Catholic population reside there.

A liturgical ceremony is scheduled for June 24, 2018, at which the Papal Nuncio Archbishop Christophe Pierre, Pope Francis’ delegate to the United States, will formally designate St. John the Evangelist Church as the co-cathedral. During this ceremony, a new *cathedra*, or bishop’s chair, will be blessed, bearing witness to the apostolic ministry of sanctifying, teaching, and shepherding. The presence of a co-cathedral in Rochester will provide unique ways to share the gospel in our Diocese’s fastest growing city.

As with any change, hard work usually proceeds that change. In the coming months, we will be looking at all of the changes that will need to be made administratively to articles of incorporation, bylaws, policies, guidelines and web-sites. The name change will affect us in so many ways, both at the Pastoral Center and at each of the parishes, schools and cemeteries. Stay tuned. As we work through these changes, we will be issuing additional guidance in the coming weeks about what this change means for you administratively. Our goal is that the new title, “Diocese of Winona-Rochester” will be reflected throughout the parishes, schools and diocesan institutions by July 1, 2018.

Thank you for the work that you do for the people of God within the Diocese of Winona-Rochester! God bless.

Finance Department: Transitions Sandy Todd, Controller • stodd@dow.org



We are pleased to announce that Ann Ringlien is filling the Accounting Assistant position most recently held by April Mera. Ann began her new duties on February 26, 2018. Before joining the Diocese of Winona, Ann worked for several years at Fastenal in Winona as an Accounts Receivable Clerk. Ann had recently moved into the role of Development and Communications Associate with the Catholic Foundation of Southern Minnesota after serving as Administrative Assistant for the Office of the Chief Finance and Administrative Officer. In her new role as Accounting Assistant, Ann can be reached at (507) 858-1247 or via e-mail at aringlien@dow.org.

Meet the Pastoral Center Staff—Beth Buswell Ann Ringlien • aringlien@dow.org

Beth Buswell joined the Finance Department in December as an Administrative Assistant. She comes to us with many years of experience in administrative support and accounting. Past employers include Wettstein’s in La Crosse, Wisconsin where she served as Head Cashier and Administrative Assistant/Marketing Coordinator for the Owner/Chief Executive Officer. Before joining Wettstein’s she worked at the Shrine of Our Lady of Guadalupe in La Crosse as Associate Accountant and Administrative Assistant to the Executive Director. Beth graduated from the University of Wisconsin – LaCrosse with two Bachelor’s degrees, one in Microbiology and another in Marketing and French. She has also earned an Associate of Applied Science Degree from Western Technical College in Accounting. She enjoys gardening, hiking, and biking. She and her husband, Randy, have two children, a dog, a cat, and chickens. Welcome to the Diocese of Winona, Beth!



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Need help with training? Check out <http://help.parishsoft.com/>

This link will provide a lot of training options from video training sessions on a variety of topics, to user guides, release notes and also system status updates. It is a great resource!

Home
Training
End-Of-Year
Support
Videos
Knowledge Base



Video Help

- [CN Family Suite](#)
- [Parish Desktop](#)
- [End-of-Year](#)
- [Training](#)



User Guides

- [ConnectNow](#)
- [Parish Desktop](#)
- [Diocese | FAQ's](#)
- [Online Giving](#)



Release Notes

- [CN Family Suite](#)
- [CN Accounting](#)
- [Parish Desktop](#)
- [Diocese](#)



Useful Links

- [Knowledgebase](#)
- [Parishsoft User-Based Forums](#)
- [Query Library](#)
- [System Requirements](#)
- [CN Family Suite: Tips & Tricks Webinar Recordings](#)

Search Parishsoft.com

CONTACT SUPPORT

Support Hours:
Mon. - Fri. | 9am - 7pm ET

System Status Updates

 **Parishsoft Stat...** @PSstatus
 We have repaired the ability to import contributions into ConnectNow Family Suite. Thanks for your patience!

 **Parishsoft Stat...** @PSstatus
 Importing Contributions into the Offering Module of ConnectNow is currently unavailable. Thanks for your patience as we work to fix it.

 **New Users**
[Transition to CN Family Suite](#)

 **End-of-Year**
[Fiscal Year-End Video Resource Guide](#)
[End-of-Year Resources](#)

 **Remote Solutions**
[Remote Solutions Administration](#)
[Uniprint](#)

For Bookkeepers...

Cindy Olson • parishsupport@dow.org

Spring Cleaning

Just as you spring clean your house, it is a good idea to start spring cleaning your accounting records in ParishSoft. Taking time now to look for reconciliation issues will help you close out your fiscal year faster. As always, if you need help, please contact me!

Things to look for:

What month are you in??? Please remember to close your months once you distribute financial statements. That way there cannot be any additional entries made in that month.

Bank Accounts – Are you up to date with bank reconciliations? Are there any items on your bank reconciliations that have been there for longer than a year?

Accounts Receivable – Are you up to date with any billings between the parishes in your cluster? Do you have any balances that haven't changed for months? If you are using the AR module, does your accounts receivable ledger account match the AR aging?

Investments – We added an investment account to the chart a few months back. It is natural account 1160 and can be used for any investments that are not with the Catholic Foundation of Southern MN. Previously, many of these investments were set up under 1115-Savings Accounts. Make sure your investments are stated at their current value as of June 30.

Deposit and Loan accounts – The 1150 accounts are no longer in use since the DOW Deposit and Loan was closed; do you still have balances in these accounts? If so, they should be moved to other savings or investment accounts.

Accounts Payable – Does your accounts payable account match the aging? It should!!

Employee Withholding – Verify that you don't have a balance carrying forward from month to month in your payroll tax withholding accounts. Your pension account should zero out each month – don't forget to enter rounding on the Pension spreadsheets so that you remit exactly what you have withheld. The flex, supplemental life and health insurance account balances (if any) should be explained (for instance, a seasonal employee might have flex or health insurance deductions spread over 9 months so you would have July and August's amounts in the liability account at June 30).

Net Assets – Please make sure you are up to date with your net asset transfers!

Are your entities in balance? – Those of us with parishes, schools and cemeteries under one umbrella may find from time to time that we have entered a parish bill into a cemetery account and then the balance sheet will be out of balance. Take a look now and find those issues. ParishSoft has a feature that can be turned on called "due to / due from" that will automatically keep your balance sheet in balance between entities.

Income and expenses – Look now for anything that doesn't look normal in your activity; make sure that you have categorized assessable versus non-assessable income correctly. There is a new account to be used for investment expenses (such as the fees charged by the Foundation for managing the investments). If you haven't been using this account (natural account 5196), please plan to use it in the new fiscal year. Spring cleaning now may make your summer a lot less stressful!

Cindy Olson • parishsupport@dow.org

The screenshot shows the ParishSoft interface with the following fields:

- General** (selected), Emp/Cust, Tax Data, Pay Data, Ded/Ben, Accums, Personal, Direct Deposit, Paychecks
- Watch Help Video!
- Employment Fields:**
 - Active
 - Job Title:
 - Job Category:
 - Employment Date:
- Custom Fields:**
 - Custom Number 1:
 - Custom Number 2:
 - Custom Text 1:
 - Custom Text 2:

A request from the Benefits office for locations processing payroll through ParishSoft:

To help simplify the process for 1095 reporting, we would like you to start using Custom Field 2 on the Emp/Cust tab in the employee's record to indicate whether that employee is participating in the Diocese of Winona-Rochester Benefits (Health Insurance, Dental Insurance, Pension, Life Insurance, Flex, and Supplemental Life Insurance). If they are benefit eligible, please type in the word "Benefit"; if they are not, leave the field blank. This field would also be

available for you to export through the Process/Payroll Information export should you need a report that could be sorted by benefit versus not benefit employees. It is a quick way to make sure your records agree with the records in the Benefits office when you receive insurance bills and to check your flex deductions at the beginning of a new fiscal year.

Office of Finance: Tax Updates



Cindy Olson • parishsupport@dow.org

GRAIN DONATIONS: Grain donations are handled a bit differently from regular cash/check contributions. Since the grain donation is not deductible on Schedule A, the contribution is considered non-tax deductible. I would suggest creating a fund in ParishSoft Family Suite for Grain Donations and make sure you do **not** check the tax-deductible box. In December, I sent out some sample acknowledgement letters that can be used for grain donations and other "special treatment" donations.

When grain is donated to a charity, the farmer signs over the grain to the charity and the charity sells the grain. To receive the tax benefits, farmers cannot sell the grain and then order the sales proceeds to be sent to the charity. The gift must be from unsold grain inventory with no prior sale commitment. The commodity should be put into the name of the charity when it is delivered to the elevator and a warehouse receipt should be issued in the name of the charity. The farmer must give up dominion and control over the grain and cannot offer any guidance as to when to sell the grain. The charity must direct the sale and the original sales invoice must list the charity as the seller. After the transfer, the charity assumes the full costs of storage, transportation, and marketing, and bears completely the risk of any loss. For most farm operators, the expenses related to the production of the donated grain are deductible on Schedule F. Donors of grain should not report the donation on Schedule A. There is no additional deduction allowed since the tax benefit comes from the deduction of production expenses and not reporting a sale on Schedule F.

W-9 FORMS

What is a W-9 form? We have all been asked to fill out W-9 forms and have requested others to fill out these forms. Much of the information below is from the IRS website.

How do I fill out a W-9 form on behalf of my organization?

Line 1: Legal name of organization as it appears on your tax forms and articles of incorporation.

Line 2 is for a "doing business as" name; you will probably be leaving that line blank.

Line 3: Check "other" and fill in: Non Profit corporation exempt under IRS Code 501C3

Part I: EIN – your federal ID number (you would leave the social security field blank)

Part II: Make sure that the form is signed and dated.

Requesting a W-9 form to be filled out by your vendors:

When do I request a W-9 form? Request a completed W-9 form if you have made any of the payments listed below:

At least \$600 in:

1. Rents (box 1);
2. Services performed by someone who is not your employee (including parts and materials), box 7;
3. Payments to an attorney. The term "attorney" includes a law firm or other provider of legal services. *Attorneys' fees of \$600 or more paid in the course of your trade or business are reportable in box 7* of Form 1099-MISC, under section 6041A(a)(1). *Gross proceeds paid to attorneys. Under section 6045(f), report in box 14 payments that: Are made to an attorney in the course of your trade or business in connection with legal services, but not for the attorney's services, for example, as in a settlement agreement.* You must also file Form 1099-MISC for each person from whom you have withheld any federal income tax (report in box 4) under the backup withholding rules regardless of the amount of the payment.

Exceptions. Some payments do not have to be reported on Form 1099-MISC, although they may be taxable to the recipient. Payments for which a Form 1099-MISC is not required: Generally, payments to a corporation (including a limited liability company (LLC) that is treated as a C or S corporation).

Reportable payments to corporations. The following payments made to corporations generally **must** be reported on Form 1099-MISC. **Attorneys' fees reported in box 7. Gross proceeds paid to an attorney reported in box 14.**

When you receive the completed W-9 form, verify that there is a box checked in section 3. If the boxes for C Corporation or S Corporation are checked, you probably do not need to issue a 1099. If Limited liability company is checked and the tax classification is C (C-corporation) or S (S-corporation); you probably do not need to file a 1099-Misc.

Hopefully the information above will help to clear some of the confusion around the W-9 form!

Travel Expense Deductions Andrew Brannon CPA, Chief Finance & Administrative Officer • abrannon@dow.org

When traveling for business, it's often difficult to know which expenses are tax deductible. Hawkins Ash has an article that will help answer your questions. Please use the link to access the article: <https://hawkinsashcpas.com/wp-content/uploads/2018/01/Travel-Expense.pdf>

Parish Accounting Support

Sandy Todd stodd@dow.org and Cindy Olson parishsupport@dow.org

Diocesan Special Collections

Parishioners are often confused when writing out checks for Diocesan (or other) Special Collections. They write the check out to the parish, the cause, or sometimes the purpose of the cause which can result in issues with the bank in depositing the checks. In the past, the Diocese has accepted checks submitted by the parishes which were written out by individual members directly to the organization (such as Catholic Relief Services). In order to streamline the process and to make sure that the donors are properly credited for their donation, the Diocese will no longer accept any checks other than a parish check made payable to the Diocese of Winona-Rochester for these collections. Please try to take the following steps to help us get the word out!

1. Put notices in the bulletin telling parishioners to make these checks payable to the parish.
2. If possible, put information right on the offering envelope stating "please make checks payable to _____" to help clear up any confusion.
3. Instruct your counters to be vigilant and check to make sure all the checks they deposit are written out to the parish only.
4. Call the members who send in checks written out incorrectly to thank them for their donation and ask for a replacement check made out to the parish – or – inform them that you will be mailing their check to the organization directly but that will mean that the parish will not list the contribution on a contribution statement.
5. If you accept contributions on-line, encourage members to use this method to contribute to all parish collections.

Donations to Catholic Charities and the Baby Bottle Collection need to be sent directly to Catholic Charities.

Why use project codes?

Cindy Olson • parishsupport@dow.org

Projects allow you to track special events *without adding new general ledger accounts*. Project Groups allow you to get reports on specific categories such as festivals, temporary restricted funds, etc. Chapter 2 of the [ParishSoft Accounting User Guide](#) has detailed information on setting up and using Project Groups and Project Codes.

What are some helpful ways to use project codes? The sky is the limit with project code options. I use them to track memorials by person so that I always know what has been given and how much has been spent. Festival events can be tracked by station to see which events are popular. Do you have multiple projects within your building fund? Projects will help you track expenses and revenue without having to add sub accounts for short term.



"We know what our summer project can be.
We can start a water slide ministry."

I asked Dana Clarke from St. Ann's in Slayton how she uses them and this is her response: I use them for all the CCW and Faith Formation expenses/deposits. Since it was hard for the CCW groups to turn over the checkbook I told them I could do a project code for them that works much like a check register. They will see every in and out. After I tie out the financials each month I just email a copy of the PDF to the treasurer right from the ParishSoft reports. I also use a project code for the flower donations. Makes it easy to track how much was given for flowers Christmas/Easter since we don't spend the entire amount each season as it comes in, but it enables the parish decorators to purchase different flowers/plants throughout the year on days such as Mother's Day, Memorial Day, Immaculate Conception, etc. with funds that remain from the holiday flower donations.

First you must set up a project group. I have **CCW**. **Faith Formation**. **Flowers**, as examples.

After you set up the project group you need to set up the project. Under CCW (project group) I have **CCW** as a project and **Quilting** as a project since they want 2 different things tracked.

When you enter the bill, you must remember to go to the "Project" area after entering the account, amount, & description. Click in the box and ALL your "projects" will drop down in the box – select the project you want. Easy! – the hard part is remembering that you need to flag it as a PROJECT!!

Sue Post, at St. Gabriel's in Fulda shared this: One of the common projects is the Fall Festival. People do want to see the results of this fundraiser. Also, if there are two main parts, e.g. the meal and a silent auction, a project could be set up for each without having to create more income/expense accounts. I also find the Fulda CCW likes reports such as funerals and Payments in Lieu of a Fundraiser. One caveat is that one needs to be aware of the potential human error of forgetting to mark all items related to a project. So it is wise to check the funeral report against a list of all funerals (or print the detailed CCW "income and expense" report) to make sure the project report is complete before releasing it to the others. As is mentioned in the ParishSoft video, projects also work for tracking how much money came in from a restricted fund source and how that money was used. For example, memorials from estates usually are dispersed in several intermediate steps and then a final distribution to the parish. In bequests, there are often stipulations as to the use and they could cross restricted funds: e.g. part for church building improvements and part for say Faith Formation. Any given restricted fund could involve money from more than one source. Instead of creating a separate restricted fund for each money source, the projects allow tracking the money by source without making the Statement of Financial Position take up pages and pages to print each month.

Lois Hund, Church of the Crucifixion-La Crescent, uses project codes for Parish Nursing. There was a donation made for the Parish Nursing Program a couple years ago. Using the project code helps me track what is left of the donation without making it a fund. I also use it to track income and expense for the CCCW.

FINANCE TIMES

Farewell and/or Retirement Gift Process for Priests Larry Dose · ldose@DOW.org

Priest assignment changes or retirements are inevitable. When these transitions occur, many parishioners want to do something to recognize this occasion in a priest's life by providing a gift.

If one wishes to extend their appreciation to a priest with a gift, here are some suggested options: *(Please note: A Parish may not make a gift from its Funds for any form of gift to a departing priest.)*

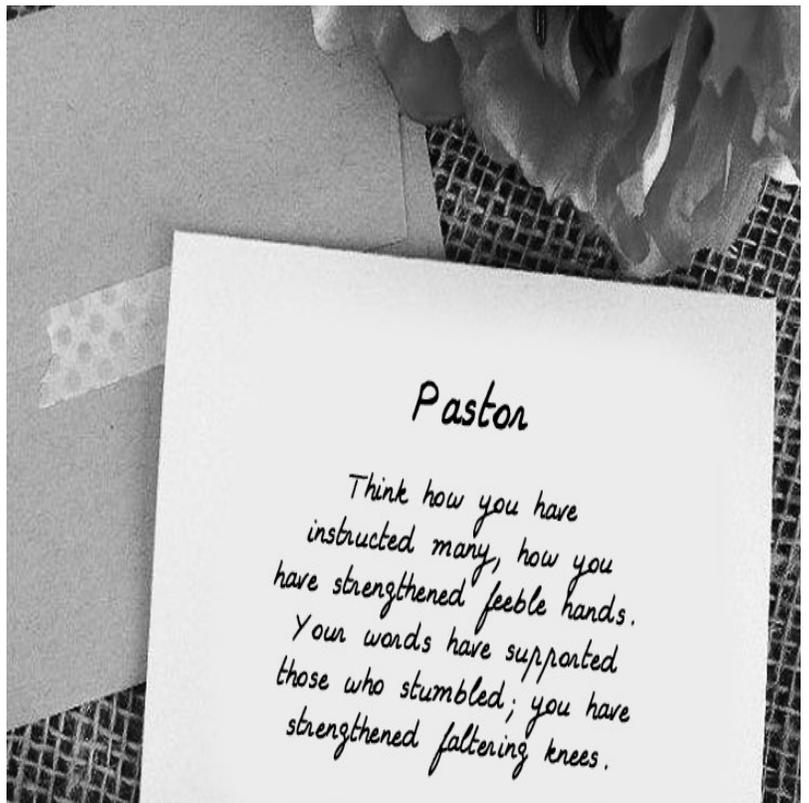
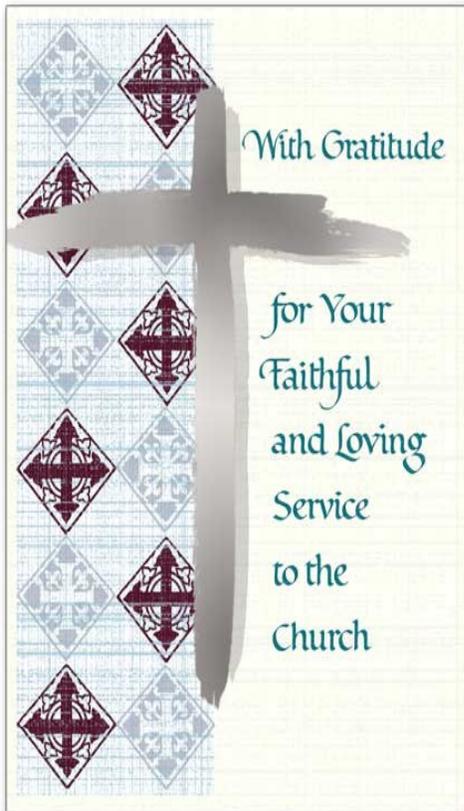
Gifts of Cash: A bank account can be set up at a local bank to facilitate donations into a specially named account for a priest. A record of each deposit can be maintained by the bank and can then be provided to the priest. Cash donations may not be handled by or through the parish. Certainly, parishioners can provide a gift directly to the priest.

Gift Card: A priest may have specific suggestions for which type of gift cards he would like to receive. Visa or MasterCard Gift Cards are widely accepted and are a more flexible use option.

Housewarming: Many senior/retired priests are starting fresh as a homeowner and may be in need of many things to equip themselves to live in a new residence. Individuals or groups could organize a Housewarming event. The priest could register for his needs at a local big box store or other retail establishment, and those interested could purchase items from the registry to be given to him at the Housewarming event.

Other Options: For those interested in a more significant gift, some parishioners prefer to pool resources for some form of a gift. This gift is not part of parish activities and therefore independent of parish business. The coordinating individual's name can be given out to people who are interested and can be contacted for further information.

Note: Parishioners may never be issued a donation receipt for a personal gift to a priest as it is not church support and is non-tax-deductible.



Audits, Audits, Audits

By Andrew D. Brannon, CPA

If you are wondering why your parish audit seems to be different than it used to be, that's because that process **has** changed. What used to be an Internal Audit has become an *Agreed-upon Procedure Engagement*. Notice that the word audit isn't even in that title. So what's changed? First let me define a few terms – *Audit*, *Internal Audit* and *Agreed-upon Procedure Engagement*.

Audit - An Audit is the examination of an entity's accounting records, as well as the physical inspection of its assets. It is performed by a certified public accountant (CPA). The CPA performs work sufficient to express an opinion on the fairness of the entity's financial statements. Essentially, the CPA is attesting to the fact that the financial statements are fairly stated in all material respects. It is considered the highest level of attestation work. Often an audit is performed because a third party is relying on the organization's financial statements.

Internal Audit – An Internal Audit examines an organization's internal control processes, risk management and governance to test to see if they are operating effectively. An internal audit focuses on the controls and processes in place and adherence to those controls and processes. It usually does not express any assurance on the financial statements. As the name implies, an internal audit is performed by auditors within an organization, rather than by an external CPA firm.

Agreed-upon Procedures Engagement – An Agreed-upon Procedures Engagement is one in which a CPA is engaged by a client to issue a report of findings based on their performance of specific agreed-upon procedures. Usually, the CPA will then make recommendations for corrective action based on their findings. The recipients of the report form their own conclusions from the Agreed-upon Procedures Report. Generally, the procedures carried out in this type of engagement are designed to test internal controls, such as segregation of duties, authorization of transactions, or reconciliation of accounts, to safeguard its assets and reduce the chances of fraud or error.

So why has the diocese made the switch from an Internal Audit to an Agreed-upon Procedures Engagement? Several reasons were considered, the main reason being that an Agreed-upon Procedures Engagement combines the best of audits and internal audits.

Independence by an Outside Party – Previously, internal audits were performed by the same employee who also served in the parish support position. Switching to a CPA firm provides an independent person performing the work, a CPA who is trained in the study, design and testing of internal controls.

A Targeted Approach to Testing – By definition, agreeing to the procedures to be performed creates specific testing targeted toward assessing internal controls deemed most important in a parish without undergoing an actual full audit. Upon learning of certain weaknesses in a specific control, additional procedures can be agreed upon to address the higher risk in that area.

Cost and Consistency – Audits by a CPA can often cost thousands or even tens of thousands of dollars. Even employing an internal auditor costs tens of thousands of dollars. By utilizing the Agreed-upon Procedures Engagement and agreeing on specific procedures to be performed, your parish only pays for the costs associated with that engagement. No internal audit departmental costs are allocated and billed to your parish. In addition, the use of a CPA firm provides consistency and continuity to the process. When an internal auditor resigns, the internal audit process gets disrupted until a new internal auditor is hired and adequately trained.

Separation of Internal Audit and Parish Support – Under our previous system, the person answering your accounting questions was the same person performing your internal audit. I've heard from many pastors, parish administrators and parish bookkeepers who felt uncomfortable asking questions because they felt that it could lead to closer scrutiny during their internal audit. By revamping our parish audit procedures, we were able to separate those two roles and bring on a part-time parish support specialist, Cindy Olson. Many of you know her and have worked with her already. In addition to her role as the diocesan parish support specialist, Cindy works for several parishes and cemeteries as their bookkeeper. This daily experience gives her a unique advantage in serving you. The parish support questions she receives may very well be the same problem she's already encountered and solved in her own parishes and cemeteries. She also utilizes ParishSoft on a daily basis, so she is very proficient in helping you in that area. All of this parish support leads to better accounting, better internal controls, better adherence to those controls and more success when undergoing your parish's Agreed-upon Procedures Engagement.

Our goal in the Finance Department of the diocese is to support you with services that you don't have to coordinate individually. We feel that this parish audit process will be an improvement overall. There have been some challenges in implementing a new system. Bear with us. As we enter our second round of Agreed-upon Procedure Engagements, we are assessing the process, tweaking it where necessary and answering your questions that arise from this new process. Many of your comments to us are being implemented going forward. Thanks for your input.

Together, the parish audit process protects the integrity of the pastor, the bookkeeper, parish staff and volunteers and provides security over the temporal goods entrusted to you by your parish members. It's a win-win for everyone!

Benefits Updates

Julia Sandsness benefits@dow.org

For Employees on Medicare

Starting April 1, new cards with a new Medicare beneficiary identifier will be mailed to individuals who currently receive Medicare. Your current card and your new card are both valid until 12/31/19. With 58 million replacement cards, it may take some time before all of the cards are replaced. Minnesota, Wisconsin, and Iowa recipients should start receiving their cards after June 2018. The new cards will no longer contain personal information such as your Social Security number, gender, or signature. There is no fee for this card.

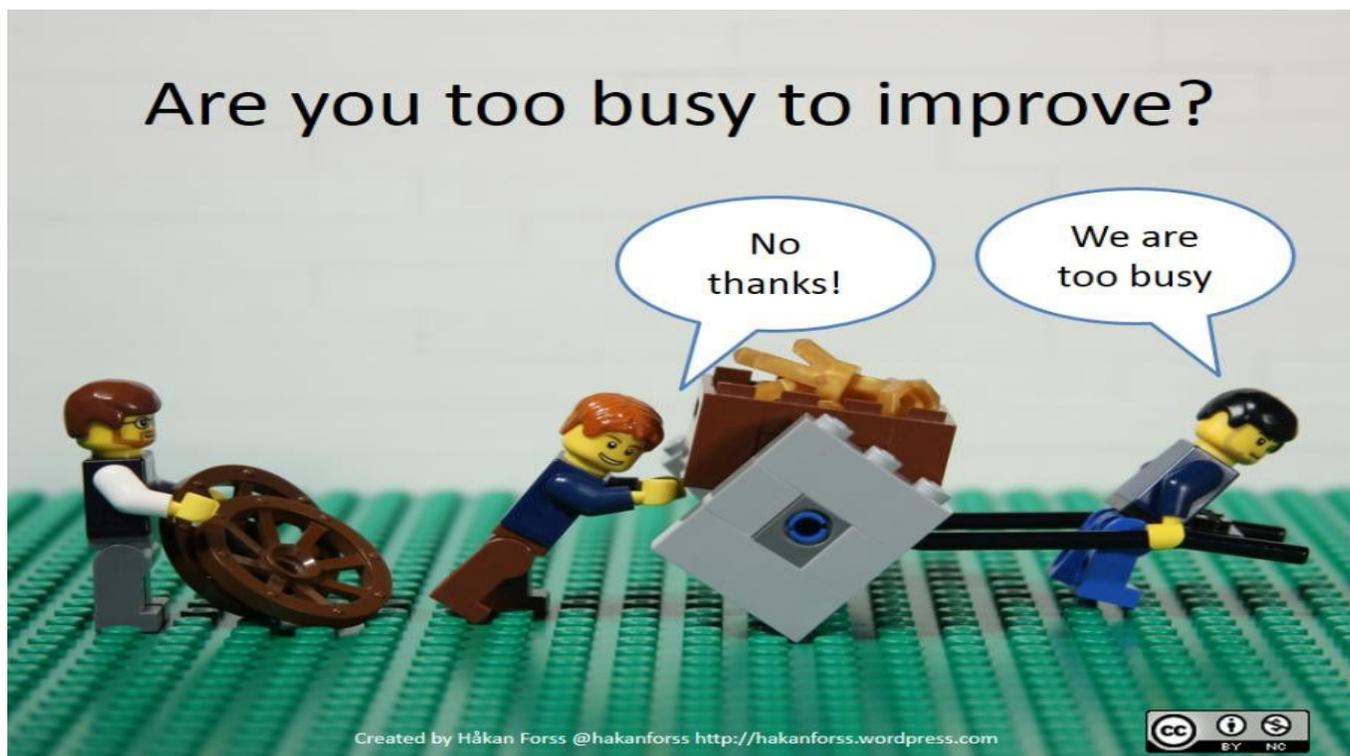
Here are some of the “scam” warnings from the Federal Trade Commission:

- Is someone calling, claiming to be from Medicare, and asking for your Social Security number or bank information? Hang up. Medicare will not call you and they will never ask for your Social Security number or bank information.
- Is someone asking you to pay for your new card? Hang up. Your new Medicare card is free.
- Is someone threatening to cancel your benefits if you do not give up information or money? Hang up. New Medicare cards will be mailed out to you automatically. There will not be any changes to your benefits.

For more information on the new changes to your Medicare card, go to the Centers for Medicare and Medicaid Services at <https://www.cms.gov/Medicare/New-Medicare-Card/index.html>. If someone tries to defraud you, contact the Federal Trade Commission at <https://www.ftccomplaintassistant.gov/#crnt&panel1-1>.

Flexible Benefits – Medical and Dependent Care

The Diocese of Winona-Rochester contracts with SelectAccount for our flexible benefits spending programs. Effective 4/1/18, their new name is “Further.” Employees who currently participate in flex should have received a postcard from SelectAccount/Further giving them information - If an employee logs into their SelectAccount, they will automatically be redirected to the new website, the employee’s login information is the same as it was for SelectAccount, and the employee can continue to use their current debit card. For further information, go to <https://hellofurther.com>.



Tell us how we can improve! We'd love to know what you'd like to see in upcoming editions. Contact Beth Buswell at bbuswell@dow.org. Thank you for reading and for your ideas!

CATHOLIC MUTUAL... “CARES”

EMERGENCY PREPAREDNESS

OVERVIEW

No organization is immune from disaster, therefore, it is essential for each member of the Catholic Mutual family to develop an emergency preparedness plan. Emergencies can arise at any time and from many causes, but the potential loss is the same – people and property.

As was stated earlier, advance planning for emergencies is the only way to minimize the potential loss from these occurrences. Please keep in mind the following considerations as you develop adequate and appropriate emergency preparedness plans to meet your particular needs.

- a. The safety of staff, students, volunteers, visitors, etc. must be the first concern in planning for any emergency.
- b. A secondary concern is the protection of the property and the various operational activities, as well as, post-event planning in order to resume normal operations, with limited interruption of service.
- c. Evaluation of all potential disasters that may occur and development of an emergency plan to meet those crisis situations.
- d. Organization and training of small groups of individuals to perform specialized services in the event of an emergency.
- e. Designation of one individual as emergency preparedness coordinator to provide leadership and direction in the event of an emergency.
- f. Distribution of an emergency preparedness plan to local emergency organizations.
- g. Dissemination of plan to all staff, students, volunteers, visitors, etc. by:
 1. Posting alarm signals on bulletin boards.
 2. Posting emergency egress routes in all areas.
 3. Posting the names of any emergency response team members on bulletin boards.



CATHOLIC MUTUAL... "CARES"

POWER INTERRUPTION PRE-PLANNING AWARENESS

Power interruption or power outages occur when the supply of power or electricity is lost for any amount of time—it could be momentary or a prolonged loss of power. Power interruptions can occur for any number of reasons, any time of day, and any month of the year.

Facility staff needs to anticipate the consequences of an electric power interruption where employee and guest safety is dependent on the non-interruption of power. Review your facilities and equipment to determine whether hazards could arise from power interruptions and to ensure your emergency procedures are adequate to address them.

Consider these questions to identify and plan for unexpected power interruptions:

- Have you identified critical equipment, systems and supplies?
- Do you have important telephone numbers and contact information readily available in hard copy?
- Do you have a hard-wired landline telephone for emergency communications? Cordless telephones may not function in the event of a power outage and cell phone batteries can run low, making them unreliable.
- Are battery-powered flashlights and extra batteries available?
- Do you have maintenance contracts for repair firms, rental companies or designated contacts to arrange for service in an emergency?
- Do you know how to manually open and close any electrically operated or secured doors and gates?
- Is your battery-powered emergency lighting regularly inspected to ensure that it is in proper working order?
- Do you have a business continuity plan, including a backup communications strategy, to reach needed individuals?
- Does your smoke alarm/emergency notification system have a battery backup?
- Have you documented your emergency plan and shared it with appropriate employees, volunteers, and parishioners?



CATHOLIC MUTUAL... "CARES"

After The Storm *Facility Management*

In many parts of the country, tornados and severe thunderstorms can cause extensive damage to our properties. As soon as it is deemed safe to examine the property, you'll want to do so.

- Watch for downed power lines. If found, discontinue your examination until you are advised it is safe to walk your grounds.
- If you have above-ground electrical service, make a visual check of the electrical connection outside of building. Do not attempt to make repairs or touch any wiring. Contact a qualified electrician to examine the issue if you suspect damages or have concerns.
- A quick survey should be made to identify the types of items that need to be secured and whether any trees or branches pose a direct threat to your property. Most of the damage from storms comes from fallen trees or branches.
- Examine the exterior of building for obvious signs of damage that could turn into a bigger problem. Make temporary repairs to protect from further damage.
- Check roof for damage such as missing shingles, torn metal, or extensive pooling of rain water on flat roofs. Look for leaks and broken vent pipes.
- The evidence for wind damage can range from missing shingles, which can be seen from the ground, to lifted shingles with broken glue seals. Asphalt shingles adhere to one another utilizing a strip of adhesive called a glue strip or sealant strip. When high winds break this seal, debris and dirt are blown into this glue area.
- Lightning damage is not always visible or obvious. It can range from structural damage to damage to a portion or the entire electrical system to the building(s).
- Examine the interior of every room and look for water staining or leaks. If you see water on the floor along the wall but no moisture on the wall itself, this would be indicative of interior water migration.
- Almost every church and school depends on volunteers for necessary maintenance and minor repair work. However, it is not recommended to have volunteers examine your property for storm damage. This should be handled by professionals who are trained to identify specific damages and are aware of potential hazardous situations.
- Report any damage by submitting a claim in accordance with your (Arch) Diocesan policy.

(Rev. 12/13)



The Guide to Emergency Preparedness™ For Catholic Mutual Group

Quick Reference Guide

This unique information system provides instant access to complex information. You and your organization are expected to be prepared for emergencies at any time. What can you give your staff to provide information and help prevent confusion during these emergencies? Your *Guide to Emergency Preparedness* will be the answer book for responding appropriately and efficiently during a crisis.



Communicate Effectively

The Guide's distinctive, three-panel design contains tiered information cards, which allow readers to quickly find the information they are looking for. Bold titles at the bottom of each card draw attention to important topics at a glance. There's no time wasted looking for the desired information or a specific phone number.

What Should I Do if . . .

All of your codes and procedures are included to answer such questions as:

- ✓ What should I do if there is a bomb threat at the school?
- ✓ How do I handle student disruptions and disturbances?
- ✓ How can I help prevent student abductions?
- ✓ What is our plan for severe weather?
- ✓ How do we handle system failures?

Coordinated Response

The Guide will present emergency and safety procedures to your staff in a concise yet informative manner. Its use will help you meet standards for compliance.

The Guide should be supplied to other response organizations, such as law enforcement, so that preparedness plans are coordinated. The Guide is always there to provide the right information to all team members.

Wall Mounted Reliability

When used with our Wall Mount accessory, the Guide will be there when needed. With consistent, conspicuous placement and its unique design, the Guide will be quickly recognized throughout your facility.



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