



Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Thursday, April 24th, 2025

Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Thursday, April 24th, 2025
Holy Cross Church Hall
4112 East Genesee Street
Dewitt, N.Y. 13214

Agenda

10:00 AM	Welcome & Prayer	Bishop Lucia
	Plan for the Day	Tom O'Connor ▶ <i>Today's agenda</i>
10:15 AM	Chancery Administration	Kateri Lickona
10:30 AM	Catholic Sun	Liz Landry & Mark Klenz
10:45 AM	Diocesan Foundation	Beth Hoey
11:00 AM	Safe Environment	Jacqueline Bressette



Roman Catholic Diocese of Syracuse

Parish Business Administrators Meeting

Agenda ... Continued

Departmental Updates:

- | | | |
|-----------------|--------------------------------------|--|
| 11:15 AM | Payroll | Carol Rojek |
| 11:30 AM | Human Resources | Rosemary Smith & Taylor Wolfe |
| 11:45 AM | Information Technology | Justin Bartlett |
| 12:00 PM | ----- Pizza & Salad ----- | |
| 12:30 PM | Parish Services | Tom O'Connor |
| | | ▶ <i>6.30.25 Financials</i> |
| | | ▶ <i>Pension Actuarial Valuation</i> |
| | | ▶ <i>Corporate Governance</i> |
| 1:00 PM | Summation | |



Official Catholic Directory

Annual Updates & Federal Tax Exemption

What is the Official Catholic Directory?

The Official Catholic Directory (OCD) is a book published annually which lists Catholic Institutions and primary personnel in the United States.

The OCD also serves as the official listing of organizations included in the USCCB Group Ruling which establishes them as exempt from federal income tax.

All Parishes, Missions, and Clergy, Schools, and many other Catholic Institutions located in the Diocese of Syracuse are listed in the OCD.

Why Am I Here Today?

- To increase awareness about the role and importance of the USCCB Group Ruling and Official Catholic Directory.
- To provide context and initial information regarding the annual updates.
- To help improve the accuracy of information requested and collected.
- To help ensure support to parishes, particularly those in times of transition.

What is the USCCB Group Ruling?

The United States Conference of Catholic Bishops (“USCCB”) is the central organization holding a group exemption letter for Catholic religious, charitable, and educational organizations in the United States.

The USCCB group ruling establishes that Catholic organizations in the U.S. that are listed in the current edition of The Official Catholic Directory are recognized as exempt from federal income tax as described in section 501(c)(3) of the Internal Revenue Code.

Background on the USCCB Group Ruling

The IRS first issued a group exemption letter in 1946 to the National Catholic Welfare Conference, the predecessor organization of USCCB.

The IRS reaffirms the group ruling annually with respect to organizations listed in the current edition of the Official Catholic Directory.

The Importance of the Official Catholic Directory

The OCD is **updated and published annually** and is the best way for donors and granting bodies to verify an entity's inclusion in the IRS/USCCB Group Ruling Exemption.

Failure to keep a listing current could **impede the ability of an organization to prove tax-exempt status**. The directory is also a widely used reference source within the Catholic Church.

Annual Review of Parish Listings

Until recently, annual updates were done by mail. Today, they are completed **online**.

Annual updates take place **early October to early November**. All parishes must **review and submit** their listing annually, even if no updates are required.

The OCD provides an online System User Guide, video tutorials, and live webinars on how to review and update listings.

The OCD Contact and the Role of the Diocese

Parishes designate a person to serve as the **OCD Contact**. This person is responsible for carefully reviewing, updating (if needed), and submitting the parish listing.

OCD Contacts are notified of the online portal opening via email and can easily register and access the site.

A **diocesan administrator** is assigned annually to support parishes and other entities with annual updates. The diocese also serves as a liaison between the parishes and the USCCB.

****Certain changes to a listing (such as changes to entity name, mailing address, or entity status) require the diocese to submit paperwork to the USCCB.****

Connecting with Parishes

We are seeking to improve our communication with entities listed in the Official Catholic Directory as we prepare for updates to the 2026 Edition.

This year, the diocese will be contacting parishes in **early September** to ensure that all OCD contacts are updated and accurate.

We want to have a personal connection to someone in your parish and provide support where needed.

Questions?

Kateri Lickona

klickona@syradio.org

315-470-1426



Inform • Educate • Evangelize

Who are we?

- Official news medium serving the people of the Roman Catholic Diocese of Syracuse
- Cover local, national and international Catholic news, views and teachings
- In existence since 1892; purchased by the diocese in 1988
- Almost 11,000 copies distributed throughout the 7 counties in the diocese

Most Rev. Douglas J. Lucia
President

Tami S. Scott
Editor

Elizabeth Landry
Staff writer

Eileen Jevis
Staff writer

Willie Putmon
Graphics production/ Design coordinator

Mark Klenz
Business advertising coordinator

Emily Long
Circulation and office coordinator

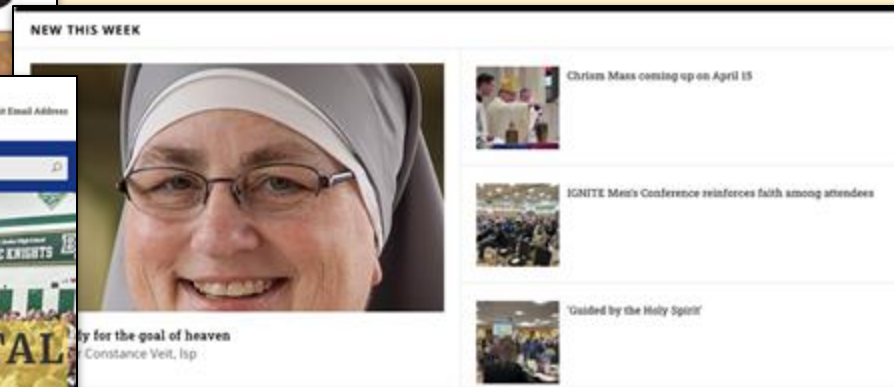
Chuck Wainwright
Staff photographer

Contact:
240 East Onondaga St., Syracuse,
N.Y. 13202
(315) 422-8153 Fax: (315) 422-7549
info@thecatholicsun.com
www.thecatholicsun.com
Office hours: 8:30 a.m. - 4:30 p.m.

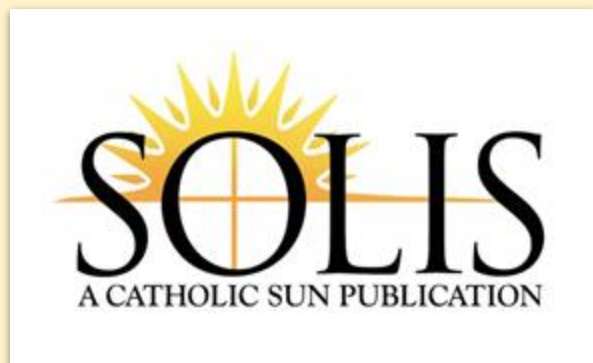
The Catholic Sun is published by the Syracuse Catholic Press Association, Inc. (Periodicals postage and fees paid Plattsburgh, N.Y.), 26 Thursdays during the year, every other week. Subscriptions are \$26 annually and \$31 outside of the diocese. Single copies are \$1. Sun back issues, kept for one year, are available in limited quantities.

What are the subscription details?

- 26 print issues published each year, biweekly
- Cost: \$26 per year, includes print and online access
- Biweekly digital updates emailed to more than 7,000 recipients
- Thecatholicsun.com had 99,000 total active users and 166,000 page views in 2024



Have you seen our latest venture?

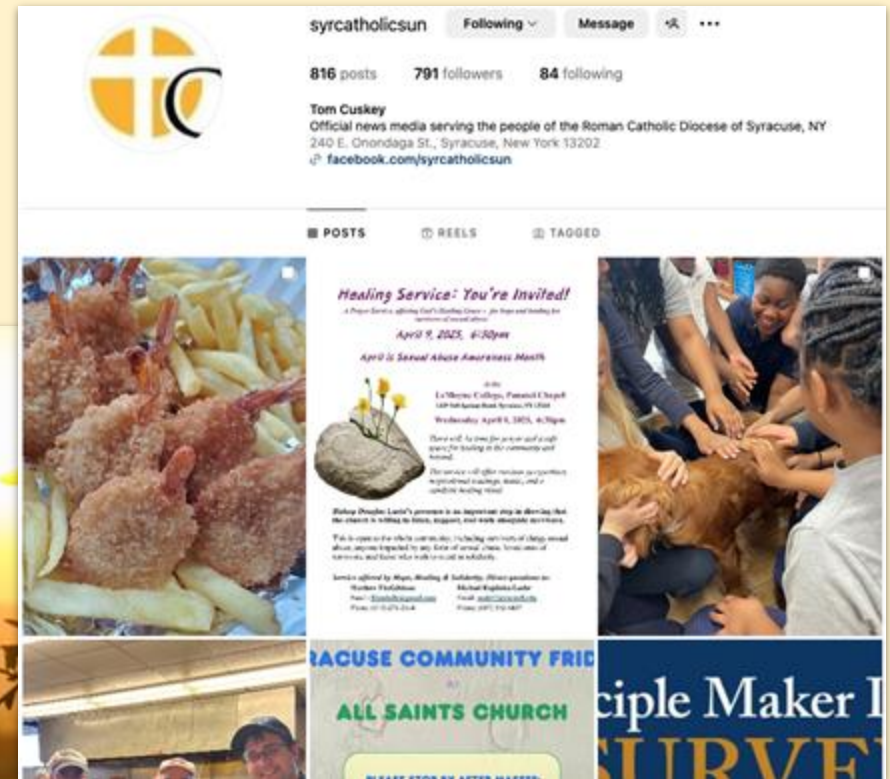


- **NEW** (as of fall 2024) quarterly magazine
- Mailed to Catholic Sun subscribers and Hope Appeal campaign donors
- Reaches almost 20,000 households across the diocese
- Longer format stories: Know your faith, live your faith, share your faith



Social media

- Almost 22,000 visits to our Facebook page in 2024
- Over 24,000 views on Instagram in 2024



Advertising with the Sun

Church of St. Michael & St. Peter
RUMMAGE SALE
 4782 West Seneca Tpk.
 Syracuse, NY 13215

Clothing, toys, kitchenware,
 furniture, sporting goods
 and so much more!

We have baked goods too!

Thursday, May 16th:
 4pm-7pm (\$5 entrance fee)

Friday, May 17th:
 10am-6pm

Saturday, May 18th:
 9am-1pm (box sale!)

1x3 - \$105

2x3 - \$210

Congratulations to
Tom Batovsky
Christ the King Parish

— ♦ — ♦ — ♦ —
Donald & Patricia MacLaughlin
Pope John XXIII Parish

2022 Immaculata Award Recipients
*From your friends, families & fellow parishioners at
 the linkage of Christ the King and Pope John XXIII.*



Happy 75th birthday
Fr. John DeLorenzo
 (August 12, 2025)

From your parish family
 St. Patrick Church, Jordan


CRAFT FAIR
 May 19th 2-5pm in parish gym
 20 creative vendors
 food for sale
 contact stdaniels@syrdio.org
 for application
 Saint Daniel Church
 3004 Court St. Syracuse, NY

1x4 - \$140

Contact Mark Klenz

advertising@thecatholicsun.com

315-579-0001

Half-page - \$630

Dear Father Gerald Buckley,

Congratulations on your 65th Jubilee! For 40 years you have admirably, patiently, and lovingly served the members and families of the Binghamton Fire Department.

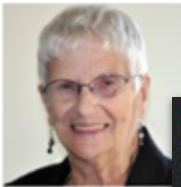
You have served many roles: spiritual leader, role model, local and state chaplain, good listener, and counselor to name a few.

No more appreciated role was that of our friend and cherished family patriarch.

Love always,
 Your Family at the
 Binghamton Fire Department




How do our publications benefit *you*, the parishes?



St. Lucy's to honor Pat Bergan at Dorothy Day Award Dinner



20 Bike blessings
Motorcycle riders receive blessings in Syracuse

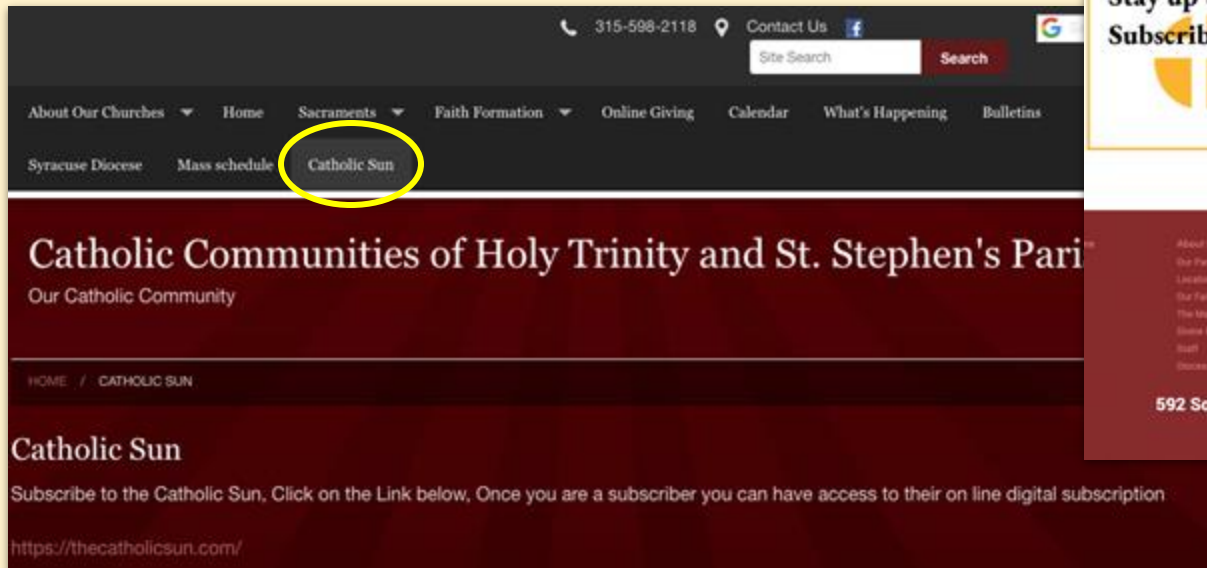
Blessed Sacrament to host second annual Lenten Soup & Speaker Series

- We are your source to share parish information with the wider diocese
- We share information about events, milestones, local happenings, important Masses, etc.
- Our publications foster cross-diocesan conversations and connections



How can you help spread the word?

- Tell your parishioners about The Catholic Sun
- Encourage parishioners to subscribe; it's not just a subscription, it's a membership to help support the mission of the diocese!
- Encourage parishioners to share feedback and story ideas with us



315-598-2118 Contact Us Site Search Search

About Our Churches Home Sacraments Faith Formation Online Giving Calendar What's Happening Bulletins

Syracuse Diocese Mass schedule **Catholic Sun**

Catholic Communities of Holy Trinity and St. Stephen's Parish

Our Catholic Community

HOME / CATHOLIC SUN

Catholic Sun

Subscribe to the Catholic Sun. Click on the Link below. Once you are a subscriber you can have access to their on line digital subscription

<https://thecatholicsun.com/>



Stay up to date with news across the diocese.
Subscribe to THE
CATHOLIC SUN

About Us Our Parish Locations Our Faith The Mass Divine Mercy Devotions Staff Diocesan Reorganization Parish Mission Parish Life Youth and Family Min... Apostolic Mission and... Safe Environment Tra... Lenten Schedule Divine Mercy Fish Fry... Bulletin and Events Events Bulletin Safe Environment Tra... Lenten Schedule Divine Mercy Fish Fry... Register as a Parishioner

592 South Main Street, Central Square, New York 13036 | (315)-676-2898 |
divinemercy@syrdio.org
copyright Divine Mercy Parish 2023



We want to hear from you!

- <https://thecatholicsun.com/contact/>
- news@thecatholicsun.com
- subscriptions@thecatholicsun.com
- 315-422-8153
- Submit feedback, send in story ideas, request coverage, provide reader submissions, place an ad
- Follow us on social media (Facebook and Instagram)
- Subscribe!
<https://thecatholicsun.com/subscribe/>
- **Thank you for your support!**



Individuals

	<u>6/30/22</u>	<u>6/30/23</u>	<u>6/30/24</u>	<u>4/20/25</u>
Total Received (excluding assessment payments)	\$4,457,315	\$4,667,396	\$4,858,453	\$4,865,582*
Donors	17,850	17,258	16,541	16,198*

*Individual Giving:

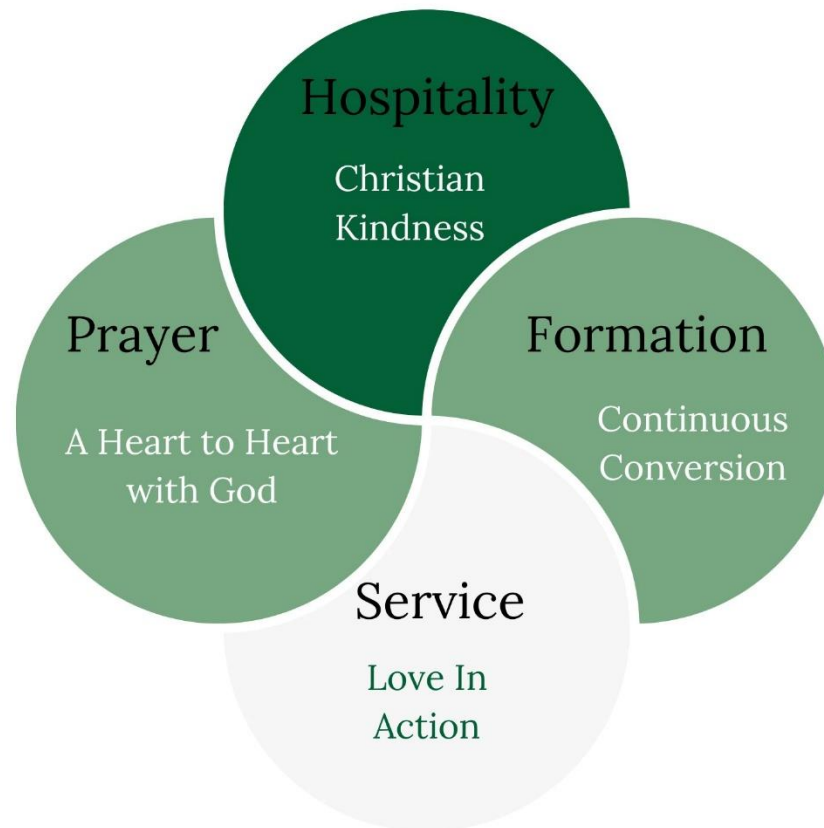
New Donors Total Amount	\$89,837
Number of New Donors	472
Recaptured Donors Total Amount	\$296,910
Number Recaptured Donors	1,975
Lost Donors (Gave to HOPE 2023 but not this year) Total Amount	(\$515,330)
Number of Lapsed Donors	(2,723)
Lost Donors Deceased Total Amount	(\$18,058)
Number of Lost Donors Deceased	(111)

Parishes

	<u>6/30/22</u>	<u>6/30/23</u>	<u>6/30/24</u>	<u>4/20/25</u>
Over Goal	83	84	82	96
90%-99% of Goal	12	11	6	10
75%-89% of Goal	14	14	15	5
50%-74% of Goal	11	8	10	2
Under 50%	3	4	1	0
Assessments Paid	\$0	\$263,191	\$243,286	\$26,812
Parish Sharing	\$666,562	\$756,601	\$755,634	\$925,950

Stewardship

Stewardship is the response of a grateful heart for all the gifts bestowed on us by God. Stewardship is the willing return of the first measure of our time, talent, and treasure to God for all that He has done for us. The four pillars of stewardship are: hospitality, prayer, formation, and service.



+ New

Home

Activity

Workspaces

My Drive

Shared drives

Shared with me

Recent

Starred

Spam

Trash

Storage

22.01 GB used

Search in Drive

⌵

My Drive > Stewardship Resources

✓ ⌵ 🗪 ⓘ

Type People Modified Source

Name	Owner	Last modified	File size	
1. Welcome to the Stewardship Resource Center.docx	me	Nov 19, 2024 me	196 KB	⋮
B&W Bulletin announcement.pdf	me	Nov 18, 2024 me	584 KB	⋮
Biblical Quotes on Stewardship.docx	me	Nov 19, 2024 me	15 KB	⋮
Color Bulletin announcement .pdf	me	Nov 18, 2024 me	590 KB	⋮
Including Our Parish in Your Will.docx	me	Nov 19, 2024 me	15 KB	⋮
Legal Disclaimer.docx	me	Nov 18, 2024 me	15 KB	⋮
Make a Gift to Our Parish Through Your IRA.docx	me	Feb 13, 2025 me	24 KB	⋮
Making a Gift of Stock to Our Parish through the Foundation.docx	me	Nov 19, 2024 me	29 KB	⋮
Making a Gift of Stock to Our Parish.docx	me	Nov 19, 2024 me	13 KB	⋮
Sample Stewardship Communications Calendar.docx	me	Nov 21, 2024 me	322 KB	⋮
Stewardship Flyer (full graphics) 2.jpg	me	Mar 15, 2024 me	293 KB	⋮
Stewardship Social Media (1).png	me	Oct 25, 2023 me	605 KB	⋮
stewardship-prayers.pdf	me	Nov 14, 2024 me	55 KB	⋮

Safe Environment

Jacqueline Bressette

Julie Moss

Tracy Shaughnessy

The background of the slide features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the right side and bottom, creating a modern, dynamic feel.

Parish Business Administrators Meeting April 24, 2025 Payroll Updates

Presented by Carol Rojek

Clergy & Tax Status

Employee Status

- Clergy are considered employees for Federal and State income taxes.
- Clergy can choose to have both federal and state taxes withdrawal from their paychecks.
- When they complete their tax return each year, they are ultimately responsible to pay federal & state taxes based upon their income they have received.

Independent Contractor Status

- For Social Security & Medicare Tax purposes, clergy are considered independent contractors and need to pay self employment taxes either quarterly or annually.
- With the self-employed status, they must pay **12.4%** for Social Security and **2.9%** for Medicare tax, for a total of **15.3%**.
- As an example, if a priest makes **\$40,000**, they owe **\$6,120** in self-employment tax

Additional Items regarding Clergy Status

- NYS Disability does not apply to Clergy
- If a priest falls ill and can not fulfill his duties, he stays on the location's payroll for three months.
- This is equivalent to a 12-week disability leave that a lay person would be eligible for.
- If the illness continues past the three months, in most cases, the priest will no longer be paid by the location and will move to the Clerical Fund payroll at the Diocese.
- The same holds true for unemployment and workers' compensation.
- These benefits do not apply to any priests or sisters working at your parishes or schools.

Clergy Compensation Changes for the 2025-2026 Fiscal Year

- There is a 3% increase applied to the salary amount for the new fiscal year.
- There are no other changes to any of the other components of the compensation package.
- However, there will be a 3% increase applied to the value of housing for this new year. Housing will change from \$1,000 per month to \$1,030.
- As in previous years, we will handle the clergy increases and send you a copy of the form for your records.

2025/2026 Clergy Compensation			
Clergy Name: _____		Date: _____	
Payroll Schedule: <input type="radio"/> A <input type="radio"/> B		Frequency: <input type="radio"/> Monthly <input type="radio"/> Biweekly	
Fiscal Year 2024-2025		Fiscal Year 2025-2026	
Co Code: _____	_____	Co Code: _____	_____
Co Code: _____	_____	Co Code: _____	_____
Co Code: _____	_____	Co Code: _____	_____
Current Compensation	\$ -	New Compensation	\$ -
Salary	\$ -	Salary	\$ -
Mass Stipends	\$ -	Mass Stipends	\$ -
Expenses	\$ -	Expenses	\$ -
Level B	\$ -	Level B	\$ -
Level C	\$ -	Level C	\$ -
Level D	\$ -	Level D	\$ -
Oratory(s)	\$ -	Oratory(s)	\$ -
Vicar Forane	\$ -	Vicar Forane	\$ -
Diocesan Responsibilities	\$ -	Diocesan Responsibilities	\$ -
Canonical Pastor	\$ -	Canonical Pastor	\$ -
Over 70 Yrs. of Age	\$ -	Over 70 Yrs. of Age	\$ -
IRA Paid (Not Incarnated)	\$ -	IRA Paid (Not Incarnated)	\$ -
(Under 10 yrs.) IRA	\$ -	(Under 10 yrs.) IRA	\$ -
Hope Appeal #	_____	Hope Appeal #	_____
Ordination Date	_____	Ordination Date	_____
Yrs. Ordained	_____	Yrs. Ordained	_____
Notes:		Clergy Housing will be increased to \$1,030 as of 07/01/25	
Long Term Care	_____	Housing Details	_____
Clergy Expense Detail	_____	Birthdate:	_____
Medicare Reimbursement	_____	Other Information	_____
Level B/C/D Details:	_____		
List Parishes Father is responsible for:	_____		
Effective Date for Compensation Change:		6/23/2024	
Completed by: _____		Approved by: _____	
		Payroll 2.2024	

Sister & Religious Order Changes for the 2025-26 Fiscal Year

- We will provide new sheets for all Sisters/Religious Orders who are paid through your location. These will also receive an increase of 3%.
- If you are currently paying a Sister through AP and want to transition this to Payroll, just contact your PR Specialist.
- We will be more than happy to complete this for you each month.

2025/2026 Religious & Sister Compensation Form			
Sister Name: _____		Date: _____	
Payroll Schedule: A B		Frequency: Monthly	
Fiscal Year 2024-2025		Fiscal Year 2025-2026	
Co Code: _____		Co Code: _____	
Current Compensation	\$ -	Current Compensation	\$ -
Stipend	\$ -	Stipend	\$ -
Medical Reimbursement	\$ -	Medical Reimbursement	\$ -
Age:		Age:	
Housing	\$ -	Housing	\$ -
Retirement	\$ -	Retirement	\$ -
Misc.	\$ -	Misc.	\$ -
Transportation	\$ -	Transportation	\$ -
Tier		Tier	
10 Month	<input type="checkbox"/>	10 Month	<input type="checkbox"/>
11 Month	<input type="checkbox"/>	11 Month	<input type="checkbox"/>
12 Month	<input type="checkbox"/>	12 Month	<input type="checkbox"/>
Order Name		Order Name	
Address		Address	
File#		File#	
Notes:			
Housing Details: _____			
Additional Information: _____			
Effective Date for Compensation Change: _____			
Completed by: _____		Approved by: _____	

Parish Labor Budgets for 2025-2026

- These budgets will be sent to you starting the 1st week in May.
- You can always make changes to the % increase as you move through your budget process. If applicable, Father's new salary amounts will be included on these budget projections.
- We will be sending Father a copy of his new compensation package for the 2025-2026 fiscal year directly.
- If your location has any employees currently at the minimum wage of \$15.50, we will be updating the budgets with a \$16.00 rate starting in January 2026. These affected employees will have two lines on the budget. The increase to \$16.00 has already been announced.
- Other employees at your location that make slightly above minimum wage should be looked at to ensure that their experience and performance is being recognized.

Pension & 403B Match Expense for 2025-26

- Employees who started working at the Diocese before July 2011 and are benefit eligible, are included in our BPAS pension plan.
- Each location receives a monthly invoice from the Diocese for their pension expense for this plan.
- With the information from the Diocese, you are able to include this expense with your budget projections.
- Employees who began working at a Diocesan location after July 2011 are no longer eligible for the BPAS pension plan.
- These employees have the option to save for their retirement using our 403B plan currently offered with Mutual of America. After a year of service with at least 1000 hours, they are eligible for the employer match up to 3%.
- This budget year, we will include this match expense for any employee at your location that currently qualifies.

Additional Budget Related Items

- ▶ Once Father and you have had the opportunity to review the labor budget we sent and have decided upon increase amounts for your staff, we can print the payroll change forms for each of your employees for the July 1st increase.
- ▶ These will be pre-printed with names and current rates. You would just need to fill in the new amount and have Father sign the forms and return the completed forms to your payroll specialist.

HR Benefit/ Payroll Change Form	
Employer Information	
Location Name: _____	Location # _____ Payroll Code: _____
Personal Information	
Last Name: _____	First Name: _____ Middle: _____
Street Address: _____	
City, State, Zip: _____ County: _____	
Status Change (Check and Complete any applicable sections below)	
Effective Date: _____	
1. <input type="checkbox"/> Change Hours From Current Hrs/Wk: _____ to New Hrs/Week: _____ <input type="checkbox"/> Change FTE From _____ to _____	
2. <input type="checkbox"/> Change Classification	
New Class: <input type="checkbox"/> less than 30 hrs/wk <input type="checkbox"/> 30-34 Hrs less than 52 wks <input type="checkbox"/> 35-39 Hrs 52 wks <input type="checkbox"/> 40-44 Hrs 52 wks <input type="checkbox"/> 45-49 Hrs less than 52 wks	
<input type="checkbox"/> Part Time Seasonal <input type="checkbox"/> Full Time Seasonal <input type="checkbox"/> PT Per Diem <input type="checkbox"/> FT Per Diem <input type="checkbox"/> PT Temp <input type="checkbox"/> FT Temp	
Reason: <input type="checkbox"/> Extended Hours <input type="checkbox"/> Reduction of Hours <input type="checkbox"/> Correction <input type="checkbox"/> Transfer <input type="checkbox"/> Job Reclassification	
3. <input type="checkbox"/> Change Job Title From Current Title: _____ To New Title: _____	
4. <input type="checkbox"/> Change Department From Current Dept: _____ To New Dept: _____	
Reason: <input type="checkbox"/> Transfer <input type="checkbox"/> Job Change <input type="checkbox"/> Correction	
5. <input type="checkbox"/> Change Pay Rate From \$ _____ per _____ To \$ _____ per _____	
Separation (Check and Complete any applicable sections below)	
Last Day Worked: _____ Date of Status Change: _____	
1. <input type="checkbox"/> Retire <input type="checkbox"/> Early Retirement <input type="checkbox"/> Normal Retirement	
2. <input type="checkbox"/> Place on Leave	
Reason: <input type="checkbox"/> Disability <input type="checkbox"/> Educational <input type="checkbox"/> Family <input type="checkbox"/> Medical <input type="checkbox"/> Military <input type="checkbox"/> Personal <input type="checkbox"/> Seasonal <input type="checkbox"/> Summer	
3. <input type="checkbox"/> Return from Leave	
Reason: <input type="checkbox"/> Early Return <input type="checkbox"/> Leave over <input type="checkbox"/> Return from Summer Leave <input type="checkbox"/> Return from Seasonal Personal	
4. <input type="checkbox"/> Terminate	
<input type="checkbox"/> Voluntary- Eligible for rehire <input type="checkbox"/> Voluntary- Not eligible for rehire	
Reason: <input type="checkbox"/> Abandoned Job <input type="checkbox"/> Returned to School <input type="checkbox"/> Illness/ Injury <input type="checkbox"/> Transfer <input type="checkbox"/> Did not return from Leave	
<input type="checkbox"/> Relocation <input type="checkbox"/> Other Employment <input type="checkbox"/> Personal <input type="checkbox"/> Mutual Agreement <input type="checkbox"/> Other _____	
<input type="checkbox"/> Involuntary- Eligible for rehire <input type="checkbox"/> Involuntary- Not eligible for rehire	
Reason: <input type="checkbox"/> Absenteeism <input type="checkbox"/> End of temp. position <input type="checkbox"/> Misconduct <input type="checkbox"/> Deceased <input type="checkbox"/> Other _____	
<input type="checkbox"/> Performance <input type="checkbox"/> Position Eliminated <input type="checkbox"/> Insubordination <input type="checkbox"/> Failed to attend "Protecting God's Children"	
It is understood that an increase in hours and/ or an increase in salary requires approval by all applicable departments.	
Employer Representative Completing this Form: _____ Date: _____	

revised 4/19

Sharing Clergy Salary & Benefit Costs when multiple locations are involved

It is a recommendation of the Diocese that shared clergy costs are calculated and reimbursed through the payroll system.

This ensures accurate and timely payments for all parties involved. Payments can be made electronically either monthly or on a bi-weekly basis.

- The following are included in these reimbursement calculations:
- Base Salary
- Mass Stipends
- Level B, C or D
- IRA Amounts (billed by Diocese)
- New Oratory Charges
- Canonical Pastor Amounts
- Clergy Expenses
- Health Insurance (billed by Diocese)
- Over 70 Pre-Retirement Incentives

Questions...

Human Resources

Rosemary Smith & Taylor Wolfe

Agenda

- ▶ Open Enrollment
- ▶ Pregnant Workers Fairness Act (PWFA) or Paid Prenatal Leave Law
- ▶ Covid Update
- ▶ Updated 2025 Forms
- ▶ Onboarding For New Employees
- ▶ HR News

Open Enrollment

- ▶ May 7th through May 22nd
- ▶ Employees will log into their accounts with retatrust.org and make new benefit selections or terminate their current benefit selections
- ▶ Employees benefits will roll over if no changes are made
- ▶ No new cards will be issued unless there is a change to the employee's dependent status (Example: single to employee plus spouse)
- ▶ **All enrollment details will be sent via email.**

Prior year 2024- 2025						Current Year 2025- 2026			
Description		Total Monthly Rate	Location Monthly Rate	Employee Monthly Contribution	Bi-weekly Contribution	Total Monthly Rate	Location Monthly Rate	Employee Monthly Contribution	Bi-weekly Contribution
Clergy Reta 100		\$1,359.50	\$1,359.50	\$0.00	\$0.00	\$1,359.50	\$1,359.50	\$0.00	\$0.00
Reta 100	Seminarians/Religious	\$967.41	\$967.41	\$0.00	\$0.00	\$1,044.80	\$1,044.80	\$0.00	\$0.00
	Employee	\$967.41	\$610.39	\$357.02	\$164.78	\$1,044.80	\$659.86	\$384.94	\$177.66
	Employee + spouse	\$2,128.30	\$1,185.46	\$942.84	\$435.16	\$2,298.57	\$1,279.89	\$1,018.67	\$470.16
	Employee + Child (ren)	\$1,596.23	\$889.34	\$706.89	\$326.26	\$1,723.93	\$960.17	\$763.76	\$352.50
	Family	\$2,708.75	\$1,508.49	\$1,200.26	\$553.97	\$2,925.45	\$1,629.41	\$1,296.04	\$598.17
Reta 500	Employee	\$883.37	\$610.39	\$272.98	\$125.99	\$954.04	\$659.86	\$294.18	\$135.78
	Employee + spouse	\$1,943.40	\$1,185.46	\$757.94	\$349.82	\$2,098.88	\$1,279.89	\$818.98	\$377.99
	Employee + Child (ren)	\$1,457.56	\$889.34	\$568.22	\$262.26	\$1,574.16	\$960.17	\$613.99	\$283.38
	Family	\$2,473.43	\$1,508.49	\$964.94	\$445.36	\$2,671.30	\$1,629.40	\$1,041.90	\$480.88
Reta HSA	Employee	\$718.39	\$610.39	\$108.00	\$49.85	\$775.86	\$659.86	\$116.00	\$53.54
	Employee + spouse	\$1,580.46	\$1,185.46	\$395.00	\$182.31	\$1,706.89	\$1,279.89	\$427.00	\$197.08
	Employee + Child (ren)	\$1,185.34	\$889.34	\$296.00	\$136.62	\$1,280.17	\$960.17	\$320.00	\$147.69
	Family	\$2,011.49	\$1,508.49	\$503.00	\$232.15	\$2,172.40	\$1,629.40	\$543.00	\$250.62
Dental	Clergy	\$34.61	\$34.61	\$0.00	\$0.00	\$36.52	\$36.52	\$0.00	\$0.00
	Retired Clergy	\$34.61	\$34.61	\$0.00	\$0.00	\$36.52	\$36.52	\$0.00	\$0.00
	Employee	\$29.40	\$0.00	\$29.40	\$13.57	\$31.02	\$0.00	\$31.02	\$14.32
	Employee + spouse	\$63.80	\$0.00	\$63.80	\$29.45	\$67.31	\$0.00	\$67.31	\$31.07
	Employee + Child (ren)	\$48.03	\$0.00	\$48.03	\$22.17	\$50.67	\$0.00	\$50.67	\$23.39
	Family	\$81.00	\$0.00	\$81.00	\$37.38	\$85.46	\$0.00	\$85.46	\$39.44
Vision	Clergy	\$7.06	\$7.06	\$0.00	\$0.00	\$7.45	\$7.45	\$0.00	\$0.00
	Employee	\$7.06	\$0.00	\$7.06	\$3.26	\$7.45	\$0.00	\$7.45	\$3.44
	Employee + spouse	\$13.39	\$0.00	\$13.39	\$6.18	\$14.13	\$0.00	\$14.13	\$6.52
	Employee + Child (ren)	\$14.29	\$0.00	\$14.29	\$6.60	\$15.08	\$0.00	\$15.08	\$6.96
	Family	\$22.40	\$0.00	\$22.40	\$10.34	\$23.63	\$0.00	\$23.63	\$10.91

PFWA or Paid Prenatal Leave Law

- ▶ This is a New York State law that was implemented at the beginning of this year that provides employees with 20 hours of paid leave time per year to be used for prenatal health care service appointments during their pregnancy.
- ▶ **The 20 hours is in addition to the employee's sick time.**
 - ▶ This can only be used for the employee during their pregnancy, not for their spouse, relative, etc.
- ▶ Below is the Frequently Asked Questions document that you may use for guidance with the law. This document is extremely helpful!

<https://www.ny.gov/new-york-state-paid-prenatal-leave/frequently-asked-questions>

Covid Update

- ▶ Covid Paid Sick Leave is expiring on 7/31/2025 per New York State
- ▶ What does this mean after 7/31?
 - ▶ If you have an employee that tests positive for Covid or they have Covid/flu like symptoms, they will need to use their sick time and Covid pay will not be issued to the employee. If the employee no longer has sick time, or vacation time, etc., they will need to take an unpaid day off if they are unable to work.
- ▶ Current process remains the same until 7/31/25
 - ▶ For employees that work for a location with 11-99 employees, they are entitled to 5 days of Covid Paid Sick Leave and do not need to use their own sick bank. To receive the Covid pay, they will need to submit their license, positive Covid test and completed attestation form.

2025 Forms

- ▶ 2025 tax forms are updated and new hire packets were sent out at the beginning of this year. If you need the new hire packet, change form, etc., please reach out to the HR department at: humanresources@syrдио.org
- ▶ As a reminder, our portal on our website went away last year, but you can locate all available benefit information, handbook information, holidays, etc., on our website: <https://www.syracusediocese.org/human-resources>

REMINDER - Onboarding For New Employees

- ▶ If you have a new employee at your location, please have them complete onboarding instead of the entire new hire paper packet

- ▶ Items you will need for the new hires for onboarding:
 - ▶ The HR set up form, pay notice, I9 form and identification. Send all items to Taylor once obtained
 - ▶ I will use the email written on the I9 form to send them an email notification to complete onboarding through ADP. The email from ADP will have a subject line, 'Welcome to ADP'
 - ▶ Once the new hire inputs their personal information and selects submit, I will receive a notification from ADP that their onboarding is complete. After, they will be added to our system for payroll

- ▶ Reminder:
 - ▶ If your new hire has any current or past position(s) at the diocese including the Charities locations, **they are not able to complete onboarding. Onboarding will only work if they are a brand-new employee!**

Onboarding For New Employees - Benefits

- ▶ No tax forms or direct deposit forms are needed
- ▶ See the diocesan holiday schedule, EAP information, etc.
- ▶ View the sexual harassment prevention policy
- ▶ Acknowledge that they will need to complete Safe Environment Training
- ▶ Do not need a registration code from ADP since they already created their account

HR News

- ▶ The HR Department is working with our SunLife vendor to change our process to benefit our employee experience!
 - ▶ SunLife is our leave administrator handling our FMLA, Short Term Disability, Paid Family Leave claims
- ▶ Employees would still need to call to initiate their claim, but it will be **a new phone number that is solely dedicated for our employees!**
- ▶ The employee will experience benefits of:
 - ▶ One dedicated case manager
 - ▶ Single claim number
 - ▶ 24/7 online access for claims
 - ▶ Education, training, and on demand learning center **MORE TO COME**

Questions?



Information Technology

Justin Bartlett

- Office 365 update
 - Price increase from \$5.10 to \$6.09 starting July 1st. There will also be a 1 year commitment for license counts. You can always go up in number but not down.
 - Billing will start showing who is licensed each month
- Firewall project
 - Cheaper and better fit for location
 - One time payment
 - Long deployment from January 2026 to July 2026
- Scanning
 - Google removed Less Secure Apps
- Email
 - Requirement to use diocesan email – No personal emails
 - 60 day password refresh
 - 2-step verification

Questions?





Parish Services Update

Parish Services Update Summary

- ☐ **Parish Financial Statements for Fiscal Year
Ending June 30, 2025**
- ☐ **Parish Lay Pension Plan**
- ☐ **ERC Update**
- ☐ **Corporate Governance**
- ☐ **Parish Reviews**
- ☐ **Staffing Updates**



Parish Financial Statements for Fiscal Year Ending June 30, 2025



Year End Requirements for Parishes

- Complete Annual Financial Statements
 - *Balance Sheet*
 - *Income Statement*
 - *Notes to Financial Statements*
 - *Addendum to Annual Financial Statements*
- Submit Annual Financial Statements to Diocese
 - *Signed Addendum must accompany the statements*
- Present final Financial Statements to Parishioners



Parish Services Update

Year Ending June 30, 2025

Planning Schedule

- Complete Annual Financial Statements *August 15th*
- Finance Committee Review and Approval *August 29th*
- Submit Statements & Addendum to Diocese *September 15th*
- Present to Parishioners *Sept/Oct*



PBA Meeting

April 27, 2023

Questions?



Parish Lay Pension Plans



PBA Meeting

Lay Pension Plan

Lay Pension Plan Valuation

- The annual actuarial valuation as of June 30, 2025 will be completed in August by BPAS Actuarial & Pension Services, LLC, the plan actuaries.
- Valuation reports will be mailed around September 1st.
- The reports included are:
 - *Statement of Plan Assets and Liabilities at June 30, 2025*
 - *Roster of Plan Participants*





Roman Catholic Diocese of Syracuse, New York
Lay Pension Plan

Statement of Plan Assets and Liabilities
at June 30, 2019

Pension Unit #100

Customer #701

Church of Sts. Mary & Joseph
Syracuse, NY

Plan Liabilities at June 30, 2019	\$ 411,205.43
Plan Assets at June 30, 2019	\$ 170,214.13
Unfunded Liabilities at June 30, 2019	<hr/> \$ (240,991.30)

The Lay Pension Plan provisions, actuarial assumptions, and benefit calculation methods are contained in the **June 30, 2019 Year End Disclosure Report of the Roman Catholic Diocese of Syracuse, New York Pension Plan**. The report is available upon request from the Human Resources Department.

The annual funding requirement from the sponsoring entity is based on the amount needed to pay out the Unfunded Liability to plan retirees, discounted at a rate of 4.25% over a thirty year period. Accrual and payment of benefits and earnings on plan assets, are reviewed annually, as is the discount rate. The funding requirement is subject to adjustment periodically.

As of June 30, 2019, your parish had the following breakdown of plan participants:

Active Employees	2
Retired Employees in pay status	6
Beneficiaries of Former Employees in pay status	0
Former Employees with vested benefits, not in pay status	4
Total Plan Participants	<hr/> 12

**Diocese of Syracuse**

Lay Employee Pension Plan

Plan Year Ended June 30, 2019

Balances at June 30, 2019

<i>Unit #</i>	<i>Pension Plan Provider</i>	<i>Status</i>	<i>Name</i>	<i>Liability</i>	<i>Plan Assets</i>	<i>Unfunded</i>
100	Church of Sts. Mary & Joseph	A	Morgan, Frances	40,863.43	16,914.98	23,948.44
100	Church of Sts. Mary & Joseph	A	Smith, Robert	90,471.69	37,449.80	53,021.89
	<i>Active Count</i>	<i>2</i>				
100	Church of Sts. Mary & Joseph	R	English, Barry	32,597.23	13,493.28	19,103.95
100	Church of Sts. Mary & Joseph	R	Pocheski, Linda	69,554.02	28,791.15	40,762.87
100	Church of Sts. Mary & Joseph	R	Randall, Joyce	5,897.55	2,441.23	3,456.32
100	Church of Sts. Mary & Joseph	R	McPherson, Richard	75,276.30	31,159.83	44,116.47
100	Church of Sts. Mary & Joseph	R	Ingelato, Donna	8,635.43	3,574.54	5,060.88
100	Church of Sts. Mary & Joseph	R	Johnson, John	40,086.59	16,593.42	23,493.17
	<i>Retired Count</i>	<i>6</i>				
100	Church of Sts. Mary & Joseph	V	Young, Robert	10,574.66	4,377.27	6,197.39
100	Church of Sts. Mary & Joseph	V	Wagner, Vanessa	6,039.48	2,499.98	3,539.50
100	Church of Sts. Mary & Joseph	V	Tartaglia, Maria	9,471.69	3,920.71	5,550.99
100	Church of Sts. Mary & Joseph	V	Weld, Howard	21,737.36	8,997.95	12,739.41
	<i>Vested Count</i>	<i>4</i>				
	<i>Total Count</i>	<i>12</i>		411,205.43	170,214.13	41.4%
		<i>0</i>				240,991.29
A	Active					
B	Beneficiary					
Y	Beneficiary of a deceased participant that is not yet in pay status					
R	Retired					
V	Vested					
F	Frozen					

PBA Meeting

Lay Pension Plan

Lay Pension Plan Valuation

The calculations include:

- Plan Liabilities by Parish
 - *Updated once a year for additional years of service, changes in pay rates, and changes in future payment terms*
- Plan Assets by Parish
 - *Updated quarterly for monthly deposits to the fund, monthly benefits paid out, and annual earnings on assets*
- Roster of Plan Participants by Parish
 - *Updated individually for current status, liabilities, assets, and net unfunded liabilities*



PBA Meeting

April 27, 2023

Questions?



Employee Retention Credit



Parish Services Update

Employee Retention Credit

ERC filing deadline

- for all quarters in 2020, the deadline was April 15, 2024
- for all quarters in 2021, the deadline was April 15, 2025

After a temporary pause in payment of ERC's, the IRS has resumed sending out checks. The payments generally go out in the order in which they were filed.



PBA Meeting

April 27, 2023

Questions?



Corporate Governance



Corporate Organization



Parish Services Update

Corporate Governance

Corporate Structure

- Parishes in the Diocese of Syracuse are incorporated under New York State Religious Corporation Law
- Each Parish is separately incorporated with its own Federal Employer Identification Number



Parish Services Update

Corporate Governance

Parish Officers

President:	Bishop
Vice President:	Vicar General
Secretary/Treasurer:	Pastor



Parish Services Update

Corporate Governance

Parish Trustees

- Two Trustees, nominated by the Pastor, approved by the Bishop
- Trustees serve a one year term, with a five year term limit
- Under extenuating circumstances, the Bishop may permit up to five, one year terms (Max 10 year total)



Parish Services Update

Corporate Governance

Parish Committees

Finance Committee:

Pastor	Ex-officio
Trustee	Ex-officio
Trustee	Ex-officio

Two or three additional members nominated
by the Pastor, approved by the Bishop

Finance Chair is elected by the committee



Parish Services Update

Corporate Governance

Parish Committees

Pastoral Committee:

Pastor	Ex-officio
Trustee	Ex-officio
Trustee	Ex-officio

Two or three additional members nominated by the Pastor, approved by the Bishop

Committee Chair is elected by the committee

Additional Committees:

As required, follow the same structure and process as above committees.



Committees

All Parish Committees are required to take meeting minutes, to subsequently review and approve those minutes, and to maintain those approved minutes in the permanent files of the corporation.



“No act or proceeding of the trustees of any such incorporated church shall be valid without the sanction of the bishop of the diocese to which such church belongs, or in the case of their absence or inability to act, without the sanction of the vicar-general or of the administrator of such diocese.”

NYS Religious Corporation Law, Chapter 51, Article 5, Section 91



“Sanction of the bishop of the diocese”

- Approval of Parish Resolutions
- Specifically authorized transactions
- Policies of the diocese
 - *Investment policy*
 - *Check signing policies*
- Role of Trustees and Committee Members
- Accepted accounting practices
- Standard operational practices
- Job descriptions



Items Included in a Parish Investment Policy

- Investment Objectives
- Asset Allocation
- Investment Restrictions
- Portfolio Rebalancing
- Portfolio Review
- Authorized Decision Makers
- Performance Benchmarks
- Investment Manager Selection



PBA Meeting

April 27, 2023

Questions?



Tax Exempt Status



Tax Exempt Status

- The Diocese of Syracuse is tax exempt under the Group Ruling of the Federal Tax Exemption of the United States Conference of Catholic Bishops ("USCCB").
- The annual Group Ruling affirmation letter was issued to the United States Conference of Catholic Bishops ("USCCB") by the Internal Revenue Service ("IRS") on September 18, 2024, with respect to the federal tax status of subordinate organizations listed in the 2024 edition of the Official Catholic Directory ("OCD" aka The Kenedy Directory).



Tax Exempt Status (Continued)

This 2024 Group Ruling affirmation letter establishes:

- 1.) Exemption of subordinate organizations under the USCCB Group Ruling from federal income tax; and
- 2.) Deductibility of contributions to such organizations for federal income, gift, and estate tax purposes.

All Parishes and other entities in the Diocese of Syracuse are tax exempt by their listing in the annual Kenedy Directory



PBA Meeting

April 27, 2023

Questions?



Parish Reviews



PBA Meeting

April 27, 2023

Items Requested to Complete the Parish Review

- COPIES of the Balance Sheet and P&L on June 30, 2024, and June 30, 2023.
- REVIEW of the most recent “Monthly Balance Sheet and P&L” provided to the Pastor, Trustees, and the Finance Committee. (What date presented?)
- VERIFY that all parish Bank accounts are on the parish Balance Sheet.
- REVIEW of all Parish bank monthly statements, including scanned cancelled checks, on January 31, 2025. (REVIEW of all bank reconciliations from QuickBooks, for all parish bank accounts).



PBA Meeting

April 27, 2023

Items Requested to Complete the Parish Review (Continued)

- REVIEW of all Investment accounts with the Parish, on June 30, 2024. (Verify each investment amount on the parish Balance Sheet).
- REVIEW of the weekly collections tally sheets for January 31, 2025. (***) Verify the weekly collection deposits to January 31, 2025, parish Operating checking account statement). (Review the Collection Policy)
- REVIEW of the Parish documents in the Corporate Binder (Trustee meeting minutes: Finance Committee minutes, Parish By-Laws, resolutions, etc.)
- REVIEW the signed Fraud Policies by all appropriate personnel at the Parish. (Including: Pastor, Trustees, Finance Committee members, employees, and count teams members). Required to be reviewed and signed each year by the Diocese.



PBA Meeting

April 27, 2023

Items Requested to Complete the Parish Review (Continued)

- REVIEW the parish Mass Stipend separate bank account. (Verify the Mass Stipend Bank account #). When was the last reconciliation performed of the bank balance, to the unsaid masses in the Mass Book?

Each Parish Review Report requires the following items per the direction of the Diocese Fiscal Services Department.

- Listing of Trustees and Finance Committee members.
 - * Each Trustee Term, and their email address, and phone number
 - * Each Finance Committee Member Term, email address, and phone number
- Copy of the Parish Investment Policy with appropriate parish signatures.

Were all the parish investments appropriate, according to the Diocesan Investment Policy?



PBA Meeting

April 27, 2023

Items Requested to Complete the Parish Review (Continued)

- Copy of the most recent Parish Trustees and Finance Committee minutes.
Does the Finance Committee meet once per quarter per Canon Law?
- Copy of the current Annual Parish Report to the Parishioners.



PBA Meeting

April 27, 2023

Questions?



Staffing Updates





THANK
YOU