



**Pastoral Council Regular Meeting
St. Elizabeth Room
May 21, 2019**

Present: Fr. Dan Sanders, Fr. Matthew Jacob, Susan Arensmeier, Doug Borys, Mary Elise Cervelli, John Clark, James DeGuire, Jim Karolewicz, Jim Kochan, Cathy Liska, Monica Misey, Tom Pranica, Joe Russell, Ken Sosnowski, Jon Van Drisse

Guests: Ron and Allie Baier, Jane Bartlett

- I. Meeting opened at 7:00 PM with a reading by Fr. Dan of the upcoming Sunday's gospel, followed by reflection and personal sharing.
- II. Housekeeping items
 - a. March 25 Meeting Minutes - motion to approve minutes made by Ken and seconded by Monica. Motion passed with unanimous approval
 - b. Pastoral Council and/or Staff Membership Updates – James DeGuire and Tom Pranica are new members of the Council. Rob and Allie Baier attended the meeting to discern if they have interest in participating.
 - c. Parish Life Night Schedule for 2019-2020 – the schedule for Parish Life Night is July 9, September 10, November 12, January 14 and May 12. There will be no meeting during the month of March.
 - d. Next scheduled Pastoral Council Meeting is on June 18, 2019.
 - e. Pastoral Council Meeting Schedule for 2019-2020 – the schedule for Pastoral Council is July 16, August 20, September 17, October 15, November 19, December 17, January 21, February 18, March 17, April 21 and May 19.
- III. Fiscal 2020 Budget Presentation – Jane Bartlett reviewed the Balance Sheet and Operating Statements as of March 31 (see attached). Information from the May Finance Council Meeting was also reviewed (see attached).
 - a. Due to expense controls and some deferred spending, the estimate for the end of the fiscal year is a slight surplus of \$1,100. A discussion occurred regarding the \$105,023 shortfall in Envelope and Offertory Contributions. Given the phase 2 campaign, some donors may have reduced their envelope related offering to contribute to the campaign. As in past years, communication regarding the shortfall will be included in the bulletin to request assistance in closing the shortfall.
 - b. Salary increases of 1% as a cost of living increase have been included in the 2019-2020 budget. To pay for the staff increases, a one-year suspension of Outreach grants will occur.
 - c. Fr. Dan indicated that he and Fr. Matthew feel strongly that any increase for themselves should not exceed what is being given to the staff and will contribute the 1.5% difference to the parish.
 - d. Fr. Dan also mentioned he has received information that the Archdiocese will likely begin a capital campaign, with Lumen Christi being a participant in the first cohort of parishes. There will be a feasibility study conducted in late May/early June.
- IV. Commissions Reports and Actions – see attached
- V. Pastor Update and Miscellaneous items
 - a. Church Security & Crisis Planning Guidelines (from 5/2019 Parish Leader Update) – a copy of the Guidelines was provided to Council members (see attached). An analysis of security procedures is in process as part of the phase 2 construction process. Active shooter drills have been conducted for the school.



**Pastoral Council Regular Meeting
St. Elizabeth Room
May 21, 2019**

- b. Priest's Spring Assembly Update – nothing significant to report from the Assembly meeting.
- c. Archdiocese Feasibility Study – see notes in section III above.

The meeting closed at 8:30 PM with vespers.

Respectfully submitted by Jim Karolewicz

Commission Liaison Reports and Actions for May 21, 2019

Stewardship (MaryElise Cervelli)

1. We briefly provided Mary Elise with some feedback on the new Mass setting for her next Parish Council meeting. Overall things are going as well as one can reasonably expect. Fr. Dan emphasized the Leadership of the Parish maintaining a helpful positive attitude in being of service to others. This could include Welcoming Parishioners, opening doors, scooching in with the seating configuration in St. Cecilia Hall, or assisting with the elevator or parking lot. Mostly just having a smile and a wave is what he's looking for.... making people feel welcome.
2. The Commission agreed that we would like to continue to work on the entire process of Welcoming New Parishioners. This is really a multi-faceted effort involving Cherie & Laura at Reception, Catherine with one on one phone calls/visits with new members, and the Commission continuing to host Welcome Breakfasts. Part of the process is also wanting to improve the New Parishioner Folder. We see today's version as needing more in terms of inspiration, presentation, and content. Ken even went "undercover" to two other nearby parishes to see what they were doing and we brainstormed the following ideas: (Please feel free to add other ideas you have, or I may have missed.)
 - First a foremost a Welcome letter from the Pastor's would be a great start! (Joel will attempt a rough draft to show to Catherine)
 - Overall, the folder needs a friendlier touch and tone... more pictures, colors, and a more modern/updated appearance.
 - We thought the current folder has too much emphasis on "finances" with as many as 4 current inserts having a financial purpose. Some are duplicates. We'd like to come up with something simpler and subtler, like a "bookmark" outlining how to begin giving. Maybe a half page explanation. We can also include one envelope in the new folder.
 - We need to add something about Lumen Christi School!
 - Add a recent Bulletin within each folder
 - Describe the Parish web-site & Flock notes to get people used to using those resources.
 - Make sure a Parish Photo Directory is given to all new Parishioners.
 - We'd like to also spruce up the design of the Parish Ministries Handbook.

Rick's wife Kelsey has a graphics design background and is willing to help us with the Presentation/design part of the folder, so we'll continue to work on this over the next few months with the hope of having an improved deliverable by the fall.

3. Rick's follow up letter to the other Commissions was well received and Catherine will forward it on to her Commission contacts. Any completed Committee Narratives can be forwarded to me and I'll get them in the Bulletin through Bonnie.

School (Joe Russell & Doug Borys)

- Enrollment for the new school year is projected to be 319 students, including 50 new students.
- Encouraging student curriculum to include music. In addition to broadening the student's education, doing so may provide a group of people interested in participating in music as part of worship ministry.
- Lumen Christi Athletic Association has five adult volunteers to assist with these events.

Human Concerns (Monica Misey and Cathy Liska)

- Several members of the Human Concerns Committee attended the Archdiocesan Human Concerns Summit, attending workshops on human trafficking, addiction, food pantries, and urban initiatives. Committee members are exploring ways to provide direct service and advocacy in those areas.
- A few members also toured the Benedict Center (an outreach for women on the street) and are following up on needs.

Commission Liaison Reports and Actions for May 21, 2019

- Orientation for all Family Promise volunteers is June 12, 6:30 pm, at the school! Enter Door 6.
- We are inviting Barbara Graham to come speak to our committee about immigration justice and advocacy.
- We hope to have Fr. Dan hold another listening session in the fall/winter, due to overwhelmingly positive feedback.
- We are exploring collaboration possibilities with St. Francis Borgia for substance addiction ministries.

High School (Drew Braaten)

- Brat Fry to support the summer Outreach trip program was very successful. It was noted that Mrs. Braaten makes the best chocolate chip cookies!!

Building Items (Doug Borys, Susan Arensmeier)

- Good progress on the phase 2 construction. Communication committee providing view of progress to parishioners via the Parish Web site and e-mail messages. Ken suggested the possibility of inserting plexiglass into the wallboard barriers to allow parishioners to see the progress when they participate in worship.

Finance (David Kriete)

- Nothing to report outside of the information shared by Jane and coming from the last Finance Council meeting.

Deanery Level Items (Doug Borys)

- Met on April 8, 2019:
 - Diocesan 175th Anniversary. Reviewed planned events starting with the Celebrating Community event on May 4.
 - Synod implementation. Seven Day of Service is September 22-29. Also discussed the Amazing Parish process.
 - Church Security. The Diocese with the assistance of Catholic Mutual has completed guidelines on church security and crisis planning. The Diocese has guidelines that are intended for each parish to use in developing their own security plans. The guidelines include formation of a security committee, security during Mass, training, no armed volunteers and more. Catholic Mutual has provided a memorandum about concealed weapons including appropriate response and signage. Catholic Mutual has also created an app with emergency response procedures.
 - Report from the February 2 Parish Councils Congress was provided and reviewed.
 - Future meeting dates: October 7 at St. Monica's/St. Eugene's, April 6, 2020 at Lumen Christi

Catholic Formation (Susan Arensmeier)

- Child Ministry: 72 children made their First Eucharist at four masses in March and April. Classes for all grades were completed the week prior to Easter. Focus now is on the Roar Bible Camp which will be the second week of June. In addition to adults, there are middle school and high school youth who are helping with this dynamic camp. Planning is beginning on next year with registration in August.
- Middle School: There are a lot of things planned for middle schoolers this summer. There is a Brewers Game and tailgating party on June 7 at Miller Park, volunteers are helping with the summer bible camp, a middle school retreat to Chicago in August and an urban immersion experience that will take place in downtown Milwaukee also in August. A trip to Noah's Ark on June 17 will help keep the kids engaged and a back to school BBQ and Capture the Flag will be in August to celebrate the beginning of a new school year.
- High School: 69 students were confirmed by Bishop Haines at St. Frances Borgia on May 10. It was a beautiful ceremony and the Bishop had many things to say to the students. He read all their letters and addressed many of their joys as well as concerns. St. Frances Borgia was very gracious and easy to work with. We are very appreciative of their hospitality. Focus now turns to the summer outreach trips. They raised \$3,200 at the brat fry this weekend. We need adult volunteers to accompany high schoolers on the summer trips. Activities for the high school kids are being considered now and we will update you next month.
- Young adults: There is a young adult study of the Mass on Wednesday nights and families are helping to staff the child care room during the 09:30AM Mass on Sundays. Tina Rindt is struggling to have enough volunteers for Child Care at this Mass – please help identify volunteers to allow this service to continue.
- A program called SoulCore was well received earlier in May. The program incorporates gentle exercise with the recitation of the rosary. Child care was provided for this program.

Commission Liaison Reports and Actions for May 21, 2019

- RCIA candidates were received at the Easter Vigil and another group for next year has begun.

Prayer and Worship (Jim Karolewicz & Jim Kochan)

- Nothing new to report

Trustee Level Items (Jon VanDrise & John Clark)

- A personnel committee is being established to help manage personnel related issues.

Pastoral Leadership Staff (Ken Sosnowski)

- Nothing new to report

Leaven Church Congregation
Balance Sheet

	As 6/30/18	As 3/31/19	As 6/30/18	As 3/31/19
ASSETS				
Current Assets:				
General Checking Account (BMO Chk 1665)	153,303.98	321,801.52	200,070.00	273,956.06
Building Checking Account (Phipp Bank 3857)	1,867,057.13	3,170,235.29	405,156.50	0.00
City of Mequon Escrow Account	68,172.14	-	2,504.24	0.00
Accounts Receivable & Prepaid (short term)	703.72	978.73	263,870.00	263,870.00
School Petty Cash	130.00	130.00	5,860.16	4,047.22
Total Current Assets	\$ 2,089,596.97	\$3,493,604.84	\$685,850.90	\$541,873.23
Short Term Investments:				
Unrestricted Savings (Baird 4610)	\$1,282,596.42	\$1,296,207.89		22,117.91
Investment of savings into Construction	\$280,000.00	\$273,956.00		3,600.00
				6,432.21
				32,575.85
				64,725.79
Property and Equipment				
Land	86,500.00	86,500.00		
Land Improvements	73,621.00	73,621.00		
Buildings	3,918,838.68	3,918,838.68		187,791.37
Building at 2640 W. Mequon Road	490,000.00	490,000.00		8,501.20
Rectories	492,500.00	492,500.00		665.00
Furniture & Fixtures	194,223.27	194,223.27		28,375.23
Equipment	55,843.00	55,843.00		225,336.77
Cemetery New Land Purchased	0.00	T880		
Construction in Progress Phase 1	11,836,299.00	11,667,275.90		
Construction in Progress Phase 2		571,544.10		
Total Property and Equipment	\$ 17,147,826.95	\$17,590,345.95		
Long Term Restricted Investments:				
Helping Hand (BMO Chk 9012)	16,067.62	26,777.53	16,067.62	26,777.53
Bush Memorial Fund (CCF)	90,842.00	85,217.00	90,842.00	85,217.00
Parish Endowment Fund (CCF)	905,181.00	852,908.00	905,181.00	852,908.00
School Endowments (CCF)	2,211,680.00	2,085,565.00	2,211,680.00	2,083,565.00
Faith In Future CIP Fund (BMO MM 6726)	66,252.41	30,789.03	66,252.41	30,789.03
Cemetery Perpetual Care (CCF)	61,340.00	79,257.00		
Cemetery for Land Purchases (BMO Chk 7739)	41,935.94	18,544.36		
Cemetery (BMO Chk 9038)	14,963.75	11,219.76		
		3,188,278.50		
				53,188,278.50
Total Assets	\$24,157,681.05	\$24,082,653.18	\$24,157,681.05	\$25,002,683.12
				180
LIABILITIES AND CAPITAL				
Current Liabilities:				
Loan from Savings to pay Partnership Line of Credit				
Partnership Line of Credit - Building Project				
Checking owed to Partnership Account				
Salaries Payable - teacher contract				
Flexible Benefit Payable				
Accounts Payable				
Total Current Liabilities				
Deferred Income:				
Summary of In/Out P&L Accounts				
Prepaid School Registrations				
Leaven Project - FMSC & St. Michael				
Deferred Liability (expenses)				
Total Deferred Income				
Designated Funds:				
Shamrock Fund				
Parent Association				
SCRIP Inventory				
Athletic Association				
Total Designated Funds				
Restricted Fund Balances:				
Helping Hand Fund				
Bush Memorial Fund				
Parish Endowment Fund				
School Endowment Fund				
Faith in Our Future Fund				
Cemetery Perpetual Care Fund				
Total Restricted Funds				
Net Asset Balances:				
Unrestricted Fund				
Invested in Capital Assets				
Invested in Construction				
Net Income				
Total Net Asset Balances				
Total Liabilities & Capital				

Lumen Christi Congregation
Statement of Profit and Loss

4/5/2019

	<u>F2019 Actual YTD</u> <u>Actual 3/31/19</u>	<u>F2019 Budget YTD</u> <u>Budget 3/31/19</u>	<u>F2019 Over/(under)</u> <u>YTD Budget</u>	<u>Annual Budget</u> <u>6/30/2019</u>
Revenues:				
Contributions				
Envelope & Offertory Contributions	1,795,977	1,901,000	(105,023)	2,430,000
Vigil Lights	8,575	7,200	1,375	9,500
Donations and Gifts	-	-	-	-
Stipend Income	3,000	4,500	(1,500)	6,000
Flowers	3,003	4,450	(1,447)	5,000
Contributions	1,810,556	1,917,150	(106,594)	2,450,500
Formation Ministries				
Catholic Formation Revenue	94,272	95,350	(1,078)	101,550
School Revenues	1,379,870	1,382,344	(2,474)	1,569,119
Formation Ministries	1,474,142	1,477,694	(3,552)	1,670,669
Other				
Interest & Dividends	9,395	1,125	8,270	1,500
Bulletin Income	4,000	4,000	-	4,000
Memorial Donations	2,022	3,000	(978)	4,000
Funeral Fees	4,200	1,600	2,600	2,000
Bequests	2,968	-	2,968	-
Parish Endowment	45,900	45,900	-	45,900
Other (from Deferred)	55,987	52,000	3,987	52,000
Other Revenues	124,472	107,625	16,847	109,400
Total Parish Revenues	\$ 3,489,170	\$ 3,502,469	(93,299)	\$ 4,230,569
Expenses:				
Prayer & Worship				
Liturgy & Worship	152,273	158,520	(6,247)	209,307
Liturgy - Music Ministry	26,395	24,475	1,920	35,375
Prayer & Worship	178,668	182,995	(4,327)	244,682
Formation Ministries				
CF Salaries/Benefits	257,938	257,452	486	343,669
CF General Expenses	27,952	36,398	(8,446)	45,700
School Salaries/Benefits	1,557,191	1,583,200	(26,009)	2,121,903
School General Expenses	129,773	148,908	(19,135)	197,580
Formation Ministries	1,972,854	2,025,958	(53,104)	2,708,852
Administrative Services				
Administration Salaries/Benefits	123,562	125,721	(2,159)	167,631
Archdiocese Assessment	148,281	128,000	20,281	128,000
Administration General Expenses	53,331	54,359	(1,028)	68,000
Pastoral Ministry	118,282	121,247	(2,965)	172,380
Building & Grounds Salaries/Benefits	104,288	100,536	3,752	132,222
Building & Grounds General Expenses	332,235	345,364	(13,108)	430,803
Administrative Services	880,000	875,226	4,773	1,099,036
Stewardship/Evangelization/Mission				
Stewardship	96,292	107,650	(11,358)	141,199
Evangelization	3,041	3,650	(609)	4,200
Human Concerns	3,783	13,500	(9,717)	31,500
Stewardship	103,115	124,800	(21,684)	176,899
Total Parish Expenses	\$ 3,134,637	\$ 3,208,979	\$ 74,342	\$ 4,229,469
Parish Net Surplus (Deficit)	\$ 274,533	\$ 293,490	\$ (18,957)	\$ 1,100

Memo

To: The Finance Council & Pastoral Council
From: Jane Bartlett, Director of Finance
Date: ~~June 12, 2018~~
Re: Fiscal 2020 Budget Summary

Budget General Assumptions:

- Envelope and Offertory was kept to same budgeted amount as Fiscal 2019
- Salary raises include 1% for all staff as a cost of living increase and to cover the increase in employee health insurance premiums. 2.5% for the Priests was mandated by the Archdiocese, and 3 teachers earned the requirements to a new category with a significant pay increase.
- In order to pay for the staff 1% raises, the Outreach grants were suspended for what is hoped only 1 year.
- Health insurance premium costs went up by 4%, dental went down by 7% and vision remained the same.
- There are no significant staff turnover in this budget, but school is working to replace 2 teachers leaving and we hope to have that into the budget by the time of submission to the Archdiocese.

Summary by Ministry:

Buildings and Grounds - This ministry includes all expenses for utilities, cleaning, repairs and maintenance, and maintenance staff for the whole campus (School and Parish). Staffing has been adjusted from 2 FTE to 2.3 including a change to cleaning from contract to employee. Increases to utilities have been accounted for and the capital improvements line items was eliminated due to the building project. .

Net savings year over year budget = \$36,400

Stewardship/Evan/Mission – There is a net savings in this ministry due to a personnel change that occurred in F19.

Net savings year over year budget = \$34,600

Prayer and Worship A net savings is shown with offsetting adjustments in salaries, minimal expense changes, and a decrease for outside musicians.

Net savings year over year budget = \$1,100

Catholic Formation No change to the student fees of \$200 (Confirmation at \$230) are proposed. Staffing is adjusted from 5.41 FTE to 5.31. We continue with the plan that started in F18 to incorporate expenses covered by FIOF in recent year back to the operations budget with the knowledge that FIOF will be used up eventually.

Net savings year over year budget = \$5,300

School The tuition was raised 2.5% for grades K5-8, and up to 5.5% for K3 & K4. The budget includes a projection of 313 students and currently there are 309. Most of the increase cost shown below is the 1% cost of living raise for staff and 3 teachers are moving on the merit payscale with a more significant pay increase. There is a savings with a switch from a Spanish teacher to a contracted Spanish service. The school budget is 33% parish funded.

Net cost year over year budget = (\$20,800)

Administration This ministry is a net cost year over year budget to account for \$27,700 budgeted increase in the Archdiocese Assessment which is based upon income, is going up .5% each year, and we recognized two changes in the computation that had been unknown. There is a staffing savings due to a voluntary reduction in hours. The computer and programming licensing fees continue to go up.

Net cost year over year budget = (\$19,800)

Pastoral The assumption is that we will continue having the 2 same priests. Pastoral salary structure from the Archdiocese has been incorporated with a raise for each Priest of 2.5%.

Net cost year over year budget = (\$4,400)

Human Concerns – The budget saving in this ministry is due to the decrease in Outreach Grants that will be awarded.

Net savings year over year budget = \$23,000

Budget for 6/30/20

	<u>F2016 Actual</u>	<u>F2017 Actual</u>	<u>F2018 Actual</u>	<u>F2019 Actual YTD 4/30/19</u>	<u>F2019 Budget</u>	<u>F2020 Budget 7/1/19-6/30/20</u>
Revenues:						
Contributions						
Envelope & Offertory	2,487,738	2,369,726	2,407,037	1,968,870	2,430,000	2,430,000
Vigil Lights	8,683	9,239	10,951	9,587	9,500	9,500
Bequests	21,000	32,500	-	2,968	0	0
Donations and Gifts	3,431	3,977	955	-	0	0
Stipend Income	6,000	6,000	6,000	4,500	6,000	6,000
Flowers	5,185	4,470	5,379	4,354	5,000	4,500
Contributions	2,532,037	2,425,912	2,430,322	1,990,279	2,450,500	2,450,000
Formation Ministries						
Catholic Formation Revenue	88,298	91,209	97,003	97,392	101,550	101,290
School Revenues	1,274,460	1,377,506	1,537,951	1,477,289	1,569,120	1,572,980
Formation Ministries	1,362,758	1,468,715	1,634,954	1,574,681	1,670,670	1,674,270
Other						
Interest & Dividends	1,169	703	4,307	9,395	1,500	5,000
Bulletin Income	4,000	4,000	4,000	4,000	4,000	4,000
Rental Income/Orchard Home	10,500	9,625	-	0	0	0
Memorial Donations	5,481	12,348	3,132	2,022	4,000	4,000
Funeral Fees	1,900	1,300	2,750	4,600	2,000	2,000
Parish Endowment	43,000	39,350	41,020	45,900	45,900	39,390
Other	1,682	921	60	55,987	52,000	-
Other Revenues	67,732	68,247	55,269	121,904	109,400	54,390
Total Parish Revenues	\$ 3,962,527	\$ 3,962,874	\$ 4,120,545	\$ 3,686,864	\$ 4,230,570	\$ 4,178,660
Expenses:						
Prayer & Worship						
Liturgy & Worship	209,182	212,970	214,615	169,442	209,307	212,250
Liturgy - Music Ministry	41,072	30,882	35,185	34,804	35,375	31,380
Prayer & Worship	250,254	243,852	249,800	204,246	244,682	243,630
Formation Ministries						
CF Salaries/Benefits	296,539	318,301	334,431	288,019	344,169	338,930
CF General Expenses	37,686	41,611	44,010	31,801	45,200	44,900
School Salaries/Benefits	1,936,183	1,929,447	2,017,316	1,750,925	2,121,903	2,113,430
School General Expenses	170,972	180,830	224,824	142,401	197,580	230,670
Formation Ministries	2,441,380	2,470,189	2,620,581	2,213,146	2,708,852	2,727,930
Administrative Services						
Administration Salaries/Benefits	259,924	254,999	166,595	136,959	167,631	159,450
Administration Archdiocese Assmt.	123,651	126,801	124,429	148,281	128,000	155,700
Administration General Expenses	63,452	39,115	69,151	59,984	68,000	68,300
Pastoral Ministry	100,474	157,606	156,254	130,065	172,380	176,740
Building & Grounds Salaries/Benefits	128,420	145,446	133,449	117,283	132,222	138,000
Building & Grounds General Expense	530,302	479,566	456,196	362,608	430,803	388,670
Administrative Services	1,206,223	1,203,533	1,106,074	955,180	1,099,036	1,086,860
Stewardship/Evangelization/Mission						
Stewardship/Evangelization	33,694	15,719	114,946	106,940	145,399	110,800
Human Concerns	29,031	28,596	28,367	10,512	31,500	8,500
Stewardship	62,725	44,315	143,313	117,452	176,899	119,300
Total Parish Expenses	\$ 3,960,582	\$ 3,961,889	\$ 4,119,768	\$ 3,490,024	\$ 4,229,469	\$ 4,177,720
Parish Net Surplus (Deficit)	\$ 1,945	\$ 985	\$ 777	\$ 196,840	\$ 1,101	\$ 940
Parish Contributions Towards:						
Catholic Formation	F16 Actual (245,927)	F17 Actual (268,703)	F18 Actual (281,438)		F19 Budget (287,819)	F20 Budget (282,540)
School	(832,695)	(732,771)	(704,189)		(750,363)	(771,120)

Church Security and Crisis Planning Guidelines **Archdiocese of Milwaukee**

The guidelines and recommendations contained in this document were developed to assist parishes in formulating appropriate security and crisis planning measures. These guidelines and recommendations do not represent an exclusive course of action, and should be considered by parishes in light of the unique characteristics, locations, and facility designs of each parish.

In the wake of recent mass shootings and other violent acts, it has become clear that our churches are not insulated from indiscriminate or targeted violent acts. In response to these new challenges facing the Church, we recommend that your parish establish a Safety and Security Team (hereinafter “SST”) to address potentially violent situations in addition to events such as severe weather and medical emergencies.

The role of the SST is to develop and implement plans to address the safety of your parishioners, guests, staff, clergy, and physical property. The following are suggestions and strategies for the SST to consider in the development of your parish’s Church Security and Crisis Plan. Attention to, and inclusion of, the following strategies can help your parish construct a robust and effective plan.

Composition of Safety and Security Team

- When constructing the SST, parishes should consider including the following individuals: a member of local law enforcement, the pastor, parish director or clergy assigned to the parish, a member of parish maintenance (whether staff or volunteer), a parish usher, the director of religious education, and a medical professional. Involving the pastor, parish director or clergy in the development of crisis and security planning is important because of his or her administrative responsibilities to the parish and important role in communication to parishioners. When selecting a clergy member, it is advisable to choose a priest or deacon who is regularly present at most Masses.
- It is suggested that the actions and decisions of the SST be recorded and shared with all team members. Ultimately, a written document encompassing your parish’s Church Security and Crisis Plan should be created, and the plan should be shared with all staff, clergy, volunteers, and parishioners.

Getting Started

- It is suggested that the first action of the SST should be to walk the interior and exterior of the church as a group, focusing on potential points of entry and possible vulnerabilities. The team should create detailed site and floor plans which identify all points of entry, fire exits, stairways, utility shut-offs, and electrical panels. These plans can then be used by the team to develop responses to various forms of crises. Once completed, a copy of the plans should be given to local law enforcement.
- Consider recruiting and training security volunteers to assist the SST during Mass and events at the church. These volunteers must be adults, and may be ushers, greeters, or other parishioners.

Security During Mass and Events at the Church

- If the church has multiple entrances, the number of entrances that remain open and unlocked after the start of Mass or an event should be minimized as much as possible. If possible, a greeter or usher should be positioned at each entrance that remains open after the start of Mass or event. Please remember to be conscious of late arrivals to Mass and events. If possible, consider positioning a security volunteer outside the church before and during Mass to watch for developing situations outside of the church.
- **IMPORTANT NOTE:** When minimizing the number of open and unlocked entrances, please ensure that entrances that also serve as fire exits are only locked to people coming in from the outside, and remain operable for any person already inside the church attempting to exit. All exit doors should remain accessible and operational in case of the need for a quick exit.

Training Security Volunteers

- It is suggested that the parish contact local law enforcement to ascertain whether on-site training is available for the SST and security volunteers. If local law enforcement is not able to provide this type of training, such training may be offered by private security firms.
- Consider having security volunteers wear a visible badge with a photo identifying who they are. This badge should be large enough to see from a distance as it will be important in coordinating your Church Security and Crisis Plan in a crisis situation.
- Consider having security volunteers carry walkie-talkies for quick and easy communications among one another.
- Recommend that security volunteers carry cell phones, as these devices are important in case of the need to make outside calls.
- Consider having security volunteers carry an air horn that can be sounded in case of emergency.
- All security volunteers should be trained as to the location of all exits and the locking/unlocking procedure for each entrance and/or exit door.

NO Armed Security Volunteers

- Except for members of active law enforcement, Catholic Mutual **DOES NOT** allow armed employees, clergy, or volunteers as part of any safety or security plan, regardless of the concealed carry or open carry weapons laws in Wisconsin or in local municipalities.

Hired Security Guards

- It is acceptable for a parish to utilize active law enforcement, who may or may not be armed, whether paid or volunteer, to assist with church security. It is also acceptable to hire a professional and fully licensed security company which has insurance for its use of firearms to provide security for your parish.

Cell Phones

- Cell phones are a necessary part of any emergency response procedure, especially your parish's Church Security and Crisis Plan. All parish staff members, members of the clergy, and security volunteers should carry a cell phone in order to be able to place an emergency call in the event of a threat.
- 911 procedures are suggested to be a part of your parish's security plan. For example, no single person should be assigned to call 911 in the event of a threat. Calls to 911 should be made by any person who is available to do so. Additionally, cell phones can be programmed such that one single button dials 911.

Clearly Marked Exits

- It is suggested that all exits be clearly marked. Please keep in mind that many attendees to Mass or events at the church may be first-time visitors. Consider utilizing exit signs at each exit point, and ensure that all exit signs are clearly visible from different angles and positions within the church. In addition, remove obstacles from hallways and aisles leading to exit doors to facilitate a quick evacuation in the event of an emergency. Possible exit routes should be clearly labeled, especially exits that are not always plainly visible.
- Hardware on all doors should be inspected regularly to ensure the handle or panic bar is in proper working order and that the door opens and closes freely with minimal effort. A routine maintenance and repair program will assist with identifying issues and problems in need of correction.

Resources

- Catholic Mutual Group offers an active shooter video training scenario and crisis training geared for our schools. This information could also be useful in constructing the plan for the church and other parish buildings. You may access this training on the CMG Connect platform at www.cmgconnect.org.
- There is a risk management document labeled "Active Shooter Emergency Response" which can be found at www.catholicmutual.org. Click "Member Login", enter "0065mil" for username and "service" for password. Select the "Risk Management Info" icon, then click "Index A" or enter "Active Shooter" into the search bar.
- Another helpful tool is Catholic Mutual's *Emergency Response Procedures App* for cell phones and tablets. The instructions to download this app can be obtained by contacting your local Catholic Mutual office.
- These links to the Department of Homeland Security could be utilized for your training purposes:
 - <https://www.fema.gov/media-library/assets/documents/33007/>
 - https://www.dhs.gov/sites/default/files/publications/Developing_EOPs_for_Houses_of_Worship_FINAL.PDF
 - <http://www.dhs.gov/publication/active-shooter-emergency-action-plan-guide#>
- Should you have additional questions or concerns, please contact your Catholic Mutual Group Milwaukee service office at 262-255-6906. Thank you.