

OutReach

Volume 9 2018

A Christian Brothers Services Publication

A Call to Action on the Opioid Crisis

Preparing for an Active Shooter
Becomes Reality

Illuminating Our Lasallian Heritage



CHRISTIAN
BROTHERS
SERVICES



Honoring Brother Joel Damian

Endowment to Lewis University established in company founder's name.

Celebrating the fruits of his vision and dedication, Christian Brothers Services (CBS) honors Br. Joel Damian, FSC, on what would have been his 100th birthday, August 26, recognizing his contributions that will serve well into the future.

An activist at heart, Damian worked tirelessly in his efforts to mold the mindset of his time, recognizing the potential trouble that lay ahead for many who were bound to live without benefits unless a change was made. Laying the groundwork for what CBS has come to be, Damian started with a plan for the De La Salle Christian Brothers high schools in 1960, orchestrating the concept of pooling resources to help define insurance and financial needs and requirements, making the Christian Brothers one of the first religious orders to do so. Brother Neil Kieffe, currently on faculty at Bethlehem University in Palestine, recalls Damian starting with simple things such as buying book subscriptions for schools in bulk and having one insurance policy covering multiple schools for students participating in football.

By 1964, the Christian Brothers Employee Retirement Plan was created, providing a traditional form of retirement benefit, also known as a pension plan. Damian continued to develop ways to protect the financial resources of religious organizations and allow educational institutions to provide benefits for the new cadre of lay teachers staffing the schools.

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Damian supervised the planning and construction of Catholic high schools throughout the Midwest, 51 buildings or major additions in all.

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MAIL BAG

Please let us know what you think. Email your thoughts and suggestions to outreach@cbservices.org. Your comments may be published in a future edition.

"Christian Brothers Services' employees are highly-trained and very knowledgeable in their respective fields. This workforce of people are always very attentive to our needs and project a 'kindness' that other such companies lack. We have been with CB Services for nearly three decades for our Health and Liability insurance and for our 403(b) retirement plan and we highly recommend them for any eligible organizations."

– *Claire Eng*
Contemplative Outreach, Ltd.
Butler, New Jersey

"Without question the Holiday Month that was instituted back in 2015 was such a blessing both to the organization as well as the participants of the plan. While it is not set in stone as a given, it is still nice when you're able to reduce the costs of operations especially when the operation has a mission to further the Catholic evangelization."

– *Gregory Taylor*
5 Stones Group
Sycamore, Illinois

"I just opened my package for the Crosiers with the vehicle insurance ID cards. I had been putting it off because it's usually a lengthy process to identify the cards to the appropriate location and get them sent off. To my delight, that had already been done! As I looked in awe at the sorted cards I thought to myself, 'I wish I could let someone know how helpful this was' and then I found a note that said, 'this package had been prepared by Laura Hart (RMS)!' I truly appreciate the effort you put into preparing this package for us and am grateful for your wonderful service!! Thank You so much!"

– *Wendy Tretter*
Crosier Fathers & Brothers
Onamia, Minnesota

A Call to Action on the Opioid Crisis

Christian Brothers Services along with Express Scripts is leading the fight to end the opioid epidemic through partnership



Each day ...

- ▶ 90 people lose their lives due to opioid overdose;
- ▶ more than 1,000 people are treated in emergency rooms for misusing prescription opioids;
- ▶ families from all walks of life are losing loved ones to painkillers.

The undeniable truth--opioid addiction is so prevalent that these facts are nearly part of daily reporting. Yet, we continue to see the toll it takes on the faces of our family and friends. It's not cocaine or the hard-hitting image of what we think a drug addict looks like--it's the mom across the street who started taking painkillers for a bad back or the teenage athlete who started popping pills to stay in the game despite a sprained ankle, or the baby sitter who received a 30-day supply of hydrocodone for having a tooth extracted. Seemingly legitimate, their addiction starts with a little pill innocently prescribed by their doctor.

With more than 2 million people addicted to prescription narcotics, it is one of the largest public threats facing the nation. Recognizing the crisis and the need for a call to action, Christian Brothers Services (CBS) is working in partnership with its prescription benefit manager, Express Scripts, Inc. (ESI), through an unprecedented program set to curb the misuse of opioids through both prescriber and patient outreach and education.

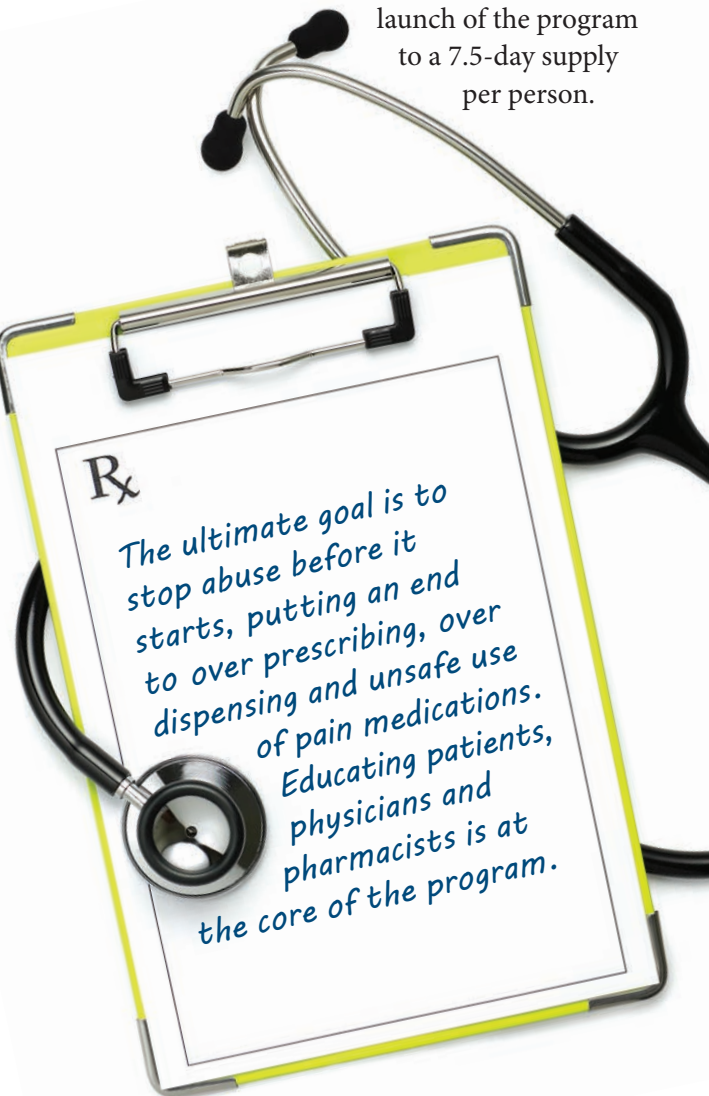
"We have the overall wellness and safety of our members in mind when we make decisions such as these," said John Airola, managing director, Christian Brothers Health Benefit Services. "It may not be popular and, at times, even frustrating for our members, but it's worthwhile if we can prevent our members from this crisis which has caused the death of more Americans under the age of 50 than any other cause." ▶▶

As an industry leader, ESI made a bold call last summer, by introducing its Advanced Opioid Management Program, which addresses both prescriber and patient issues in an effort to help fight the opioid epidemic. ESI is the first in the industry to address potential behavior and safety gaps at each level including the patient, the pharmacy and the doctor's office.

The program is a comprehensive solution that reduces excessive and inappropriate opioid prescribing, particularly for those taking an opioid for the first time and puts clients in greater compliance with guidelines recommended by the Centers for Disease Control and Prevention (CDC).

Early results are already encouraging, pointing to a decline in opioid use. In the first 90 days of the program's inception, there has been a nearly 60 percent reduction in the average days' supply for patients receiving an opioid prescription for the first time. On average, a patient's prescription has decreased from an 18.6-day supply per person before the

launch of the program to a 7.5-day supply per person.



In addition, since the start of the program, 95.9 percent of patients prescribed an opioid for the first time started with a seven-day supply or less.

The ultimate goal is to stop abuse before it starts, putting an end to over prescribing, over dispensing and unsafe use of pain medications. Educating patients, physicians and pharmacists is at the core of the program. The Advanced Opioid Management Program addresses the many concerns in the care continuum and offers solutions ranging from counseling on the proper use of the medication and its safe disposal for patients, to tools for physicians at the point of care and safety checks for dispensing pharmacies.

According to ESI, because the opioid epidemic is such a complex issue, effecting change requires addressing all parties that influence opioid decisions. Through its data analytics, specialized care model, fraud, waste and abuse management capabilities and application of behavioral science, ESI is uniquely positioned to engage prescribers, mobilize payers, and protect patients to address the national epidemic comprehensively.

Less than a year into the program, ESI was awarded the Pharmacy Benefit Management Institute's (PBMI) Excellence Award in the Opioid Management Strategy Category.

"We are pleased to present Express Scripts with this award for their Advanced Opioid Management solution which successfully influences behavior at each touchpoint of the drug therapy continuum helping patients appropriately utilize these highly addictive medications," said Jane Lutz, executive director, PBMI. "The strategy behind this program blends prescriber support, patient outreach/education, and point-of-sale management for effective results."

Research shows that after just 10 days on a prescription opioid, one in five people become long-term users. From the time a patient is prescribed medication, safeguards are put in place, allowing patients to receive the medication they need while preventing unnecessary refills that could put patients at risk of significant harm. Part of the service is to educate patients that opioids, while a very effective tool for managing pain, are also very powerful drugs that also can cause side effects and possible dependence. As an added benefit and at no cost to them, patients are offered assistance and tips for maintaining healthy habits for taking medicine as prescribed.

Controlled prescription drugs, specifically opioids, have been linked to the largest number of overdose deaths of any illicit drug class, outpacing those for cocaine and heroin combined since 2001.



"This has become quite an epidemic of sorts and we need to do our part to help protect our members from potential abuse and addiction these types of medications can cause," said Airola.

Through the program, many checks and balances are apparent. Neuroscience Therapeutic Resource Center (TRC) pharmacists provide proactive counseling on safe opioid use during calls with first-time opioid patients; program members send thousands of educational letters and safe disposal bags to patients who received an opioid prescription, and prescribers are notified when a patient has accumulated an unsafe amount of opioid medication.

In addition, with a focus on safety, a point-of-sale component targets the use of fentanyl, an incredibly potent drug linked to a rise in overdose deaths. Requirements have been added to the coverage approval to tighten the criteria for fentanyl products. Additionally, a new Drug Quantity Management (DQM) for fentanyl patches has been created for a complete and comprehensive DQM solution for opioids.

Physician care alerts are also in place to recommend the co-prescription of naloxone, a drug used for overdose reversal, for potentially high-risk members who are receiving a large number of opioid prescriptions where treatment does not appear to be coordinated.

Another component of the program addresses physician education and peer comparison, including prescriber educational messaging that leverages behavioral science and social norming based on the area of practice and peer comparison to encourage more conservative opioid prescription.

To further crack down on opioid abuse, ESI also offers an Enhanced Fraud, Waste and Abuse (FWA) Program, which provides quarterly reports that identify unusual behavior.

This report identifies individuals who have received five or more claims for controlled substances from three or more prescribers during the most recently completed calendar quarter. A known tactic for gaining access to more prescriptions, "doctor shopping," is typically used to feed an addiction, stockpile the medication in one's home, or divert the medication to other people on the street. The FWA monitors more than 100 different related scenarios.

Controlled prescription drugs, specifically opioids, have been linked to the largest number of overdose deaths of any illicit drug class, outpacing those for cocaine and heroin combined since 2001. In addition, the CDC estimates that the total "economic burden" of prescription opioid misuse alone in the U. S. is \$78.5 billion a year, including the cost of health care, lost productivity, addiction treatment and criminal justice involvement.

ESI also recognizes that the nation's employers are inadvertently paying for one-third of the opioid medication that ends up being misused and is ultimately damaging to their benefit plan members and their families. With the Advanced Opioid Management Program, ESI believes its approach is more than just utilization management and is about working comprehensively to put an end to the opioid crisis.

Christian Brothers Health Benefit Services is committed to serving its members through partnerships such as those with ESI that continue to work to truly understand the needs of its members. ☀

Preparing for an Active Shooter Becomes Reality



Have you started preparing for an active shooter incident at your organization?

Odds are if you are not an educational facility, your answer would be no. Despite being inundated with the news of such incidents, merely viewing and thinking about it does not mean you are prepared for the hazard in terms of risk management. Organizational preparation requires leadership action and commitment, as well as coordination, communication, time and support.

Active shooter incidents have been on the rise for the past 17 years. Seven casualties were from one incident in 2000, but in 2017 alone, 729 casualties from 30 separate incidents occurred in the U.S. This threat is not going to disappear and incidents are trending in a scary direction. Dioceses, churches, schools, health care facilities, convents/monasteries, retreat centers and shrines are considered "soft targets," which assailants prey upon. These locations are easily accessible to large numbers of people and have limited security or protective measures in place making them vulnerable to attack.

Now is the time to start taking action. When leadership makes the decision to prepare for such an incident, numerous benefits are achieved, including:

- ◆ the reduction of lives lost and possible injuries during an incident
- ◆ increased morale—employees see that leadership cares about them and their family's safety
- ◆ deterred assailants move on to look for a softer target; knowing your organization is prepared

Getting Started

As with all new risk management programs, how the first step is executed always sets the stage and must come from the top. Leadership must communicate its plan to all employees and demonstrate they are committed to this path. Draft a formal message similar to the following: "The organization is taking the threat of a possible active shooter seriously. We will develop a protocol to address this threat and provide all employees with training to help them better understand the threat and to better protect themselves, the clientele that we serve and the ministry of the organization."

After leadership has committed the organization to this specific path (which is usually the hardest step), the next steps usually fall in line. If your organization is a school, nursing home, retirement community or one that cares for vulnerable clientele, special considerations may be needed when developing plans to protect the clientele your ministry serves.

The following six steps will help your organization develop the right plan:

1. Assemble a planning team: Case studies find a team approach that includes interested representatives from across the organization to be a sound method. The team should be small enough to allow for good communication between team members but large enough so there is not too much burden placed on any one person. The team also

can include employees who have had practical experience outside the organization such as individuals who have had experience with the military, law enforcement or first aid responders. Others who have been on similar teams in an organization, such as a Business Continuity or Emergency Operation Planning Team, can provide valuable insight. Identify external resource team members. Although these members might not participate in most meetings, they can help to provide suggestions, direction and resources to the team. External team members could include contacts from the local police and fire departments, attorneys, contracted risk control experts and insurance company representatives. As with any new team, a structured approach for running the team needs to be developed. This structure, at a minimum, should include roles and responsibilities such as chairperson or secretary, a meeting schedule and duration of meetings, etc.

2. Educate team and identify threats: The more each member on the team understands the "who, what, where, when, why and how" of active shooter incidents, the better they can see the larger picture. This step is important, though it should not slow the team down from moving on to the next step. One simple way to begin the education is to have everyone attend a webinar that focuses on understanding how an active shooter may operate and how to prepare. Some of these webinars are free or at very low cost since the companies producing them are looking for new clients to sell services.

Following the webinar, the team can discuss its merits and how to apply them to their organization. The team also can find organizations that offer training on-site, via the web or through free videos. Various divisions of the Department of Homeland Security offer training videos. Check out "*Options for Consideration Active Shooter Preparedness Video*,"¹ or "*RUN, HIDE, FIGHT*."²

Before or after the education, the team will need to develop and prioritize a list of threats. Before moving to the next step, the team might also want to do some additional research in obtaining sample plans, planning guides, checklists and other resources. A number of resources are available. Multiple, trusted government sites often offer free materials that are easily accessible online. For starters, check out the Department of Homeland Security³; Federal Bureau of Investigation (FBI)⁴ or the Federal Emergency Management Agency⁵. ▶▶

¹www.dhs.gov/options-consideration-active-shooter-preparedness-video
²www.ready.gov/active-shooter ³www.dhs.gov ⁴www.fbi.gov ⁵www.fema.gov

3. Determine goals and objectives: After identifying and developing a list of active shooter and active threats, the team then needs to lay out goals and objectives. An FBI document on developing emergency operations plans¹ is an excellent resource to help organizations through each step of the process. In part, the guide suggests developing three goals for each identified threat with multiple measurable objectives that need completion in order to meet one goal.

4. Identify courses of action: Developing courses of action for each goal and objective should include the "who, what, where, when, why and how" to accomplish the goal and objective. Creating a possible scenario for each threat can help with this step of the process. It will help the team visualize and talk through possible actions or situations that could take place for any given scenario.

5. Write, review and approve plan: Write a plan to determine how the organization will react after a given threat. As is standard, review any new plans or future updates internally and externally. You may need an attorney review to ensure the plan complies with the law, as well as a review by any governmental agencies involved to ensure compliance with local and state requirements. You also may consider contracting with an expert to complete a final review of the plan before approval.

6. Implement, test and maintain the plan: After the plan is approved, it is time to implement the plan. Implementation should begin with communication. All employees should be informed when the plan is complete and given general guidelines for when and how implementation will begin. As part of the implementation process, ongoing training for all employees needs to be provided. Schedule awareness training and education on a regular basis for employees to learn continually about what they should and should not do. This works to keep information top of mind and helps to develop a regular pattern of thought as to what they will do both inside and outside the office. Complete regular testing of the plan to find areas of weakness within the plan that could be strengthened. Without a good implementation and testing program, the plan is only as good as the paper on which it is written.

The average active shooter incident only lasts three minutes—there is no time to break out manuals and follow an untested plan during an actual active shooter event. Developing an active shooter or active threat plan does not happen overnight. The sooner your organization begins the process, the sooner it can be better prepared for an event we all hope never comes. For any organization, after developing a plan and using this or a similar process, you can use the same steps for other threats, such as fire, tornado, hurricane, chemical spill outside your facilities, and more. ☀

For more information on Risk Management Services, contact Jeff Harrison, Risk Control Coordinator at 630.378.2543 or jeff.harrison@cbservices.org.

¹www.fbi.gov/file-repository/active-shooter-guide-for-businesses-march-2018.pdf/view

Website Resources - Search for the following topic headers

Department of Homeland Security - www.dhs.gov

- ▶ Active Shooter Emergency Action Plan Guide
- ▶ Active Shooter Emergency Action Plan Video
- ▶ Developing and Maintaining Emergency Operations Plan
- ▶ Active Shooter Preparedness Workshop Series
- ▶ Options for Consideration Active Shooter Preparedness Video
- ▶ Active Shooter Recovery Guide
- ▶ Active Shooter Event (Quick Reference Guide)
- ▶ Active Shooter Poster

Federal Bureau of Investigation - www.fbi.gov

- ▶ Active Shooter Resources (Links to the FBI Resources)
- ▶ Quick Look: 250 Active Shooter Incidents in the United States From 2000-2017

Federal Emergency Management Agency - www.fema.gov

- ▶ FEMA PrepareAthon (Active Shooter Scenario)
- ▶ Active Shooter Answer Key
- ▶ Resources to Protect Your House of Worship
- ▶ IS-100.SCa Introduction to the Incident Command System for Schools
- ▶ IS-100.HE ICS for Higher Education

U.S. Department of Education - www.ed.gov

- ▶ Guide for Developing High-Quality School Emergency Operation Plans

Occupational Safety and Health Administration - www.osha.gov

- ▶ Preventing Workplace Violence: A Road Map for Healthcare Facilities

Other Websites - www.alicetraining.com

- ▶ Offers Active Shooter Civilian Response Training for all Organizations.

Video - www.swa4safety.com

- ▶ Active Shooter/Armed Intruder Response and Training for Senior Living Communities

Register and Then View Recorded Webinar –

- ▶ Campus Active Shooter Tabletop Exercise - www.feapc.com/campus-active-shooter-webinar/

- ▶ K-12 School Security Checklist - www.illinois.gov/ready/sitecollectiondocuments/k-12schoolsecuritypracticeschecklist.pdf

Credits:

Information was gathered and used from the above websites and resources to develop this article.

Managing a benefit plan for your workforce can be challenging. There are a host of issues to consider from basic financial considerations to providing appropriate information and services. Determining what benefits are best for your employees and how best to service those benefits are important decisions.

For the Diocese of Joliet, a merger of their defined benefit pension plan with Christian Brothers Services' (CBS) multiple employer plan was a welcome experience. When chief financial officer Michael Bava came to work for the Diocese in 2008, he recognized that the diocesan defined benefit pension plan was significantly underfunded. Taking into consideration that this was before the financial storm of 2008-2009 hit and that the plan was not small with approximately 3,000 active, term-vested and retired participants, the underfunding represented a financial problem for the Diocese.

Working with the Diocesan Finance Council, the Diocese put a plan in place to address the problems and retain the plan because it was determined that this form of retirement benefit was in the best interest of the diocesan employees. As such, benefit formulas were modified, certain plan provisions were eliminated and contribution levels were increased to begin to address the underfunding. Additionally, the finance council sought a longer-term solution that would mitigate the chance of similar problems occurring again.

While the changes made by the Diocese stopped the bleeding, the Diocese wanted a better long-term solution. Being familiar with what the CBS plan had to offer, Bava began working with CBS on options for the future. As the diocesan plan metrics were slowly improving, Bava began to explore merger opportunities with the CBS plan.

"There were very few people at the Diocese that were adept at managing a defined benefit pension plan. And importantly, there were not resources available to enhance this capability. Recognizing the capability of CBS, we began to make plans to merge the diocesan plan with the CB plan." ▶▶



Christian Brothers Retirement Planning Services administers the Christian Brothers Employee Retirement Plan (CBERP), a defined benefit plan that covers lay employees who work for Catholic organizations or dioceses. The CBERP provides a traditional form of retirement benefit, also known as a defined benefit pension plan. The Plan is funded entirely by the participating employers, with benefits based on a formula that is applied to an employee's career covered compensation to provide a monthly benefit payable for life at retirement.

Employers in Catholic organizations and dioceses are faced with a difficult balancing act of wanting to provide a safe and secure retirement benefit for employees without unduly taxing their budgets. Many employers may believe that continuing to offer a defined benefit plan is not feasible though at the same time understand the important foundation a defined benefit plan brings to the retirement security of their employees. CBS believes that finding a solution can be even more difficult because employers have multiple, sometimes confusing retirement funding options from which to choose.

Jim Ceplecha, managing director, Christian Brothers Retirement Planning Services, explains that often organizations find that offering a defined benefit retirement plan for their employees becomes too costly to maintain and sometimes even more costly to terminate.

"CBERP, with our economies of scale, can provide a plan that is more cost-effective to an employer because we are so much larger working as a whole," said Ceplecha. "A typical diocesan defined benefit plan may have about \$50 to \$100 million in assets; we are at \$1.6 billion; so we are simply more cost-efficient based on the size of the plan."

Ceplecha explains that "administrative and investment expenses are relatively more cost-efficient due to our size. Since the Plan is covering more than 30,000 participants the liabilities are spread over a larger group."

The Diocese of Joliet was attracted to various components of the Plan and the much larger asset base and number of participants. Additionally, the CBS systems were much more advanced and capable of providing an enhanced level of service for diocesan employees. A merger with CBS

also would make it possible to continue to offer a defined benefit plan as opposed to switching to a defined contribution plan.

After merging into the CBERP, Bava said the improvements were especially apparent in systems and reports. CBS provides multiple data points that map out scenarios for different stages of retirement, offering additional detail that allows users to make a more informed decision. This feature simply did not exist under the old plan due to lack of systems, staff and time.

"The merger turned out to be easier than I thought it would be, though there are a lot of reasons for this," said Bava. "Both sides worked hard to make it work. This made the likelihood of success so much greater."

Ceplecha said the first step in any merger involves CBS conducting a complete analysis of what an organization currently has in place to see if it makes sense for their organization.

"We are in the business of understanding what they need. This is what we do every day— it's our job to know," said Ceplecha. "We then give on-site help to communicate any changes and set up meetings with employees to walk them through the process—no one likes change, we try to make it easier."

Attention to such matters is what hits home with organizations like the Diocese of Joliet.

"The transfer of the plan involved significant assets and most important, necessary communications with our past and present employees," said Bava, "so it was critical that the decision be properly executed."

In his previous role as president of a privately held company, Bava noted that he might not have opted to retain the defined benefit plan and likely would have sought alternative solutions including offering a defined contribution plan as a replacement for the pension plan. But, he said that working in the Catholic Church community is simply different and that it becomes necessary to take into account the much smaller salaries of Catholic employees and their inability to contribute to a fund on their own.



"CBS is a good organization with good people—and their goals are helping Catholic organizations. With Catholic organizations like CBS, there is a different environment, a different culture than what I experienced in the private sector and I appreciate that," Bava said.

While 401(k) or 403(b) types of plans are an important element in a worker's retirement portfolio, these plans alone may not provide the income security to last through the years that many retirees will need. CBS has found these plans also put much of the burden of funding and investment selection directly on employees who may not be equipped to handle these decisions and the related risks.

Now part of the CBS plan since 2013, the Diocese of Joliet currently has about 1,500 active employees, with nearly 600 vested and more than 1,000 who receive retirement benefits through CBS.

"Our goal was to do the best we could to ensure our employees would have retirement security after working for so many years," said Bava. "And we believed that the defined benefit option was the best alternative for our devoted employees. While the pensions are modest, when combined with Social Security and personal savings, they will provide security for employees during their retirement years."

Ceplecha says organizations can find themselves in situations in which keeping up with a retirement plan becomes cost-prohibitive.

"This is when they can come to us—typically we are able to give them options they haven't heard before," said Ceplecha. "Ultimately, they want to continue to provide for their employees. We are able to help them maintain a defined benefit plan that they didn't think possible. We like to be able to turn things around and it becomes a definite win for them and their employees."

Employers who join the CBERP receive numerous benefits and the flexibility to match their contributions to their budgets. Employers are offered six contribution levels,

allowing them to select the one that best suits their retirement budget, and employees receive a solid foundation for retirement that is not market dependent, allowing them to plan for retirement income with greater accuracy and security.

In addition, CBS offers 403(b) and 401(k) Retirement Savings plans. Defined contribution plans, commonly known as 401(k) or 403(b) plans have become the most common retirement plans offered to employees. These plans can be relatively easy to manage for employers and easy to fund for employees who choose to enroll. But many plans don't offer the ease of a hands-off approach that some employers and employees would like—CBS offers this turnkey approach geared for small to midsize organizations. All of the administration is provided under the Plan by CBS in partnership with Vanguard. The employer is not burdened with all of the tasks involved in administering a defined contribution plan. Partnering with CBS allows employers to offer the retirement options their employees need without taking on the burden of all of the day-to-day administrative activities.

In addition to the option of the turnkey approach, larger organizations, with 1,000 or more employees, may prefer a more hands-on approach to their employee retirement plans, including the ability to mix and match investment options as done in an open architecture approach.

CBRPS offers the best of both worlds by offering employers the option of a defined benefit plan, a defined contribution plan or a combination of both plans. ☀

For more information, contact Retirement Planning Services at 800.807.0700 or jim.ceplecha@cbservices.org.



*"If we teach today's students
as we taught yesterday's,
we rob them of tomorrow."*

John Dewey

Three Technology Trends that are Changing Education (and the World)

Here's the challenge: A number of men and women have been chosen to move to a remote and previously unexplored island. Your job is to prepare these candidates for their trip, giving them the tools they will need to spend the rest of their lives in this obscure location. However, you have virtually no information about the destination. You don't know the landscape, climate or resources the candidates will find when they arrive. You also don't know how they will live their lives, employ their time, communicate, or if they will find happiness and purpose in their new home. You have limited time to prepare them. One more thing—they are all children, facing all the trials and tribulations that children and adolescents must endure. Get started!

With few variations, the previous scenario describes the daily challenge faced by teachers, principals and parents. Educators are asked to create a program that will prepare children for a future that no one can predict. Social and technological changes have created a world that is less predictable and changing faster than at any other moment in our history. What jobs will become available when today's 5-year-old enters the workforce? What tools will she or he use? What will work look like? As blind archers, educators shoot for a target they cannot see, hoping their aim is right.

Predictions vs. Trends

Predicting the future has always been an iffy business. If such predictions were easy, we would all have flying cars, jet packs and handheld communications devices (well, we got some things right). However, the future travels in directions that the present cannot anticipate. Close examination of the tools and techniques that exist today and which are likely to become even more important tomorrow makes trend analysis a more effective way of designing for this unknown future. Predicting 10 years from now that students will still be using iPads or Chromebooks would be foolish. We know from our own experience that another device will surely come along in this time. The trend of integrating digital tools in the classroom is undeniable. Though there are many trends in the digital world, let's look at three areas that should be central to decision-making in education today.

We cannot prepare our brave explorers
for all of the challenges they will face,
but we can give them tools that
will serve them well.

Trend #1: Mobility

The story of digital devices is a timeline of bulkiness and rarity moving toward portability and ubiquity. From the earliest room-sized machines to desktops, from laptops to tablets, from phones to watches to who knows what's next, there is an unmissable trend of putting digital devices and capabilities in the hands of all people at all times. If this is the world in which students will live, it is essential that they learn in a technology-rich environment. While this may take many forms, it does speak to the end of the traditional computer lab which is by its nature remote and less accessible. Students need access to digital tools when the learning requires it, not when the schedule allows it.

Not only does mobility change the look of education, but the content as well. Traditional education for much of the past century focused on rote learning and memorization. This was important because resources were not usually with us—one couldn't take the encyclopedia from a backpack and look up the capital of Idaho, so it had to be memorized. In today's digital age that stores information for us, the data that the average person needs to keep in memory is significantly less; or at least how we access it differs significantly. Therefore the focus of modern education moves from memorizing facts to finding and using them effectively.

Trend #2: Paperless

Paper has been the primary means of communication throughout our history, so much so that we seldom consider its many limitations. Paper can convey only two modes of communication: words and pictures. The information on a piece of paper cannot easily link to any other piece of paper unless they are bound together. The material on a piece of paper can be duplicated, but the same page cannot be viewed by several people at the same time. Finally, paper is a renewable, but limited resource that requires the use of other resources to make and distribute.

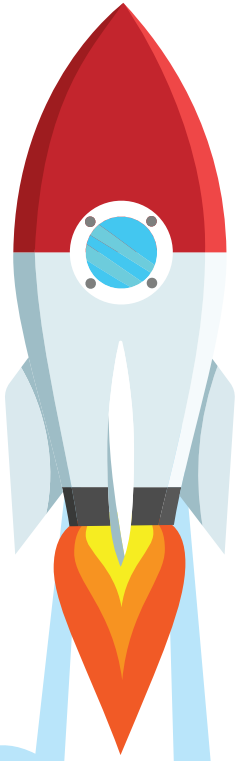
Paper is not disappearing from our culture and from schools overnight, but through time there has been a gradual shift toward digital production and distribution.

Digital products can contain not only words and pictures but also sound and video. Digital products can be easily linked to other products and customized to meet the needs of the user. A digital document can be viewed and edited by unlimited people simultaneously. Though digital creation and distribution also uses resources, it also creates less waste. While schools must continue to develop creativity and manual dexterity with traditional paper models, programs must also be designed to accommodate and use digital tools.

One area where this will show itself most clearly is in the decline and eventual end of traditional textbooks. While there is argument as to the current effectiveness of digital texts for all students, and many of us hold an emotional bond with our paper books, economic realities are eventually going to override these concerns. Most publishers are currently pursuing a "two-track" system producing both paper textbooks, as well as digital. However, this is an extremely expensive process, particularly since the development of a quality digital textbook requires significantly more work than simple digitizing of paper pages. Eventually, publishers will focus their efforts on the digital track since it reduces other costs. Paper textbooks will still exist, but they will be more costly and will not have the tools or the updates that digital texts provide.

Trend #3: Shifting Role of the Teacher

There is a cliché phrase that the modern teacher is no longer a "sage on the stage" but a "guide on the side." Another metaphor for this model of instruction is to think of the teacher as a curator of knowledge. If we think of a curator in a museum, she or he is an expert in the field whose skill is to create learning experiences that will bring the public to a greater understanding of the subject. Sometimes the curator might lead people directly, other times they may be on their own; however, the knowledgeable hand of the curator is always there. Likewise, students in a contemporary classroom may be working with a teacher, working with other classmates, or working independently, but the teacher creates the total experience that leads to mastery of standards. ►►



The vision of the "all-knowing teacher" in the front of the classroom imparting rote knowledge and testing students' memory is now an image synonymous with the past. If school is becoming less about memorizing facts, then the role of the teacher as the fount of knowledge is also less important. Digital learning programs can present information and assess student knowledge in many subjects with greater individualization and customization than a teacher in a large classroom ever can. The teacher has a vital role in this new environment, and it is evolving. Whichever way facts are distributed, students will always need direction on finding, evaluating and using that knowledge. Developing critical thinking skills and fostering an independent and collaborative work process is now the priority. The teacher is no longer valued solely as a fact dispenser but as a leader and director of student learning activities. Likewise, students are no longer seen as empty vessels to be filled, but as full active participants in their own learning.

As the educational profession faces the daunting task of preparing students for an unknown future, setting directions for tomorrow based on the trends observed today can provide a small degree of certainty in a changing environment. We cannot prepare our brave explorers for all of the challenges they will face, but we can give them tools that will serve them well.

In anticipating the new realities of education, keeping current with technology trends is paramount when developing a strategic plan. Using trend analysis is just one example of how Catholic School Management's approach can take an organization to the next level. ☀

Greg Dhuyvetter is the lead consultant at CSM, driving the organization's trend analysis strategy by offering a variety of audit, assessment and planning services to assist Catholic schools to analyze trends, overlay these with long-range projections and ultimately attain their desired outcomes with success.



Greg Dhuyvetter brings a wealth of experience to Catholic School Management and we are delighted that he has joined Christian Brothers Services. His expertise and commitment to Catholic education is evident, and he adds great depth and scope to the services we offer our elementary and secondary schools.

Dhuyvetter will be speaking at the NCEA Catholic Leadership Summit and New Leaders' Academy this fall, and keynoting the 2019 STREAM Conference for NCEA.

His upcoming CBS webinar, *Subject to Change: The Life and Times of a Catholic School Administrator* is set for October 25, 1:00 p.m. CST. Tune in!



Christian Brothers Services Announces Brother William L. Walz Endowed Scholarship Recipient

With an eye toward success, working diligently to put herself through college, Olivia Major is the welcome recipient of Christian Brothers Services' Brother William L. Walz, FSC Endowed Scholarship for the 2018-2019 academic school year.

In 2010, Christian Brothers Services (CBS) established the scholarship at Lewis University, Romeoville, Illinois, in memory of Brother Walz (1941-2010), honoring him for his years of service and dedication to the Christian Brothers and CBS.

The scholarship is awarded annually to a Lewis University senior in Computer Science or the College of Business who has a GPA of 2.75+, and has demonstrated leadership activities during their college career.

In awarding the scholarship, Brother Michael Quirk, FSC, Ed.D, president and CEO of CBS recalls the long-standing ties with Lewis University where CBS was first formed some 58 years ago, as well as the strong relationship Brother Walz maintained with the school. Brother Walz received his MBA from Lewis University and served as its bursar for four years before being named president/CEO of CBS.

"When we created this scholarship we felt it was very important to us that it made a meaningful impact and rather than split the scholarship into five recipients, we wanted to ensure a significant amount for a sole winner," said Quirk.

Thanks to successful endowment, the scholarship has grown from an annual award of \$4,000 to nearly \$6,500 and clearly made an impact on Major, a 2014 Romeoville High School student, who chose Lewis University because it was close to home.

Major has been working her way through college with jobs through Amazon to a business-to-business sales company.

Due to the state's inability to fund promised MAP grants, Major's financial aid was revoked, forcing her to take a semester off. She has since picked up a full-time job to help with the cost of tuition, easing the load on her father who is now single-handedly assisting the start of her sister's college career.

"This goes a long way in taking the weight off my shoulders," said Major, who is pursuing a degree in marketing. "I almost cried when I found out—OK, I actually did a bit."

She has set her sights on pursuing advertising and doesn't plan on letting anything get in her way, despite both working and attending college full-time.

"I look forward for the chance to be creative and meet new people—I find that very interesting," said Major.

Poised for the future, a confident Major explains she just has the will to do it. She anticipates graduating in December 2019.

Major joins past Brother William L. Walz scholarship recipients Krystal Le, Marek Blizinski, Jason Giron, Ian Ziarko, Ryan O'Keefe, Ross Goers and Yesenia Gonzalez.

"We have a very active endowment and CBS does its best to promote the scholarship, grow the endowment and take it very seriously," said Tom Drez, CBS chief information officer.

The next scholarship will be awarded in the spring of 2019 for the 2019-2020 academic year. ☀

If you would like to donate to the Brother William L. Walz Endowed Scholarship, please include "Brother William Walz Endowed Scholarship" on the check's memo line and mail donations to:

Lewis University
Senior Development Officer
One University Parkway
Romeoville, IL 60446

Illuminating Our Lasallian Heritage

By Christine Loughran

This story was adapted from the fall 2016 issue of *M*, the official magazine for Manhattan College.

A collection of stained glass windows now ensconced in the Chapel of De La Salle and His Brothers is as arresting in beauty as it is emblematic. Together, the masterpieces immortalize Manhattan College's Lasallian Catholic heritage by chronicling the Life and Work of Saint John Baptist de La Salle, whose spirituality, excellence in teaching and unparalleled commitment to social justice provide students, as well as the Manhattan community, with an ideal role model for character. They also highlight moments significant to our community's faith, such as the Nativity of Our Lord. However, the windows themselves have their own story to tell. Before their installation at the College in early 2016, they had already lived more than a hundred years.

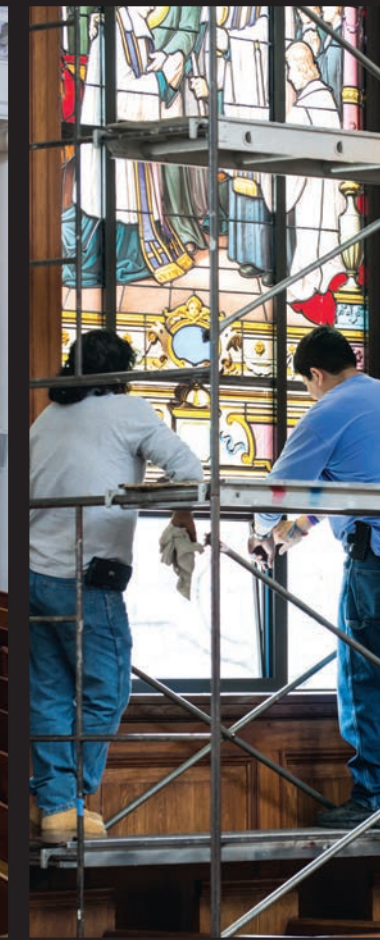
Created in the early 1900s by renowned French workshop, L. Mazuet et fils of Bayeux, the De La Salle windows were originally located at the Christian Brothers' Novitiate in Pocantico Hills, New York, from which they were transported in 1930 to the chapel of the Brothers' Novitiate in Barrytown, New York. After this property was sold by the Brothers' community in 1974, the windows suffered years of neglect.

Their long journey back to the Lasallian community began in 2002 when James Casey and John Hannaway, who knew and loved the windows from their time in the Novitiate, worked to bring these hidden gems back into the light. During the next five years, the leadership of the College worked closely with the District Council of the District of Eastern North America in the complex process of reclaiming and preserving these treasures, and installing them where they belong, in the heart of the College's campus. The faithful generosity of so many members of our Lasallian community is recognized on plaques in the lower righthand corner of each window and in the chapel's main vestibule.

Ten of the windows tell the story of our founder, who was proclaimed Patron Saint of Teachers in 1950. Shown in the series are embodiments of De La Salle's childhood in Reims, France, and the vows he took to the Brothers, as well as his service to the poor (represented in the window to the right). Two additional windows help to provide the Gospel context for the De La Salle narrative, including the depiction of Jesus as a teacher.

Following a yearlong restoration process by Rohlf's Stained and Leaded Glass Studio, the newest additions to the College's chapel were unveiled at a Mass and dedication ceremony on April 7, 2016. Here, where they can be cherished and displayed, the De La Salle windows connect present-day Manhattan firmly with its rich past. As powerful works of art, they also tell the story of De La Salle in ways that touch the heart and mind, and inspire a deep appreciation of the life and work of De La Salle, as well as that of the Christian Brothers. ▶▶





Removal and Restoration

In rehabilitating the De La Salle windows to their former magnificence, Manhattan commissioned Rohlf's Stained and Leaded Glass Studio, a family owned and operated firm that has been in business since 1920. In that time, the studio has completed projects for Grand Central Terminal and the Basilica of Saint Patrick's Old Cathedral, among other iconic landmarks in New York City and throughout the U.S.

To begin their work with the De La Salle windows, Rohlf's transported the pieces from Barrytown, New York, where they resided since 1930 at the Brothers' Novitiate, to the studio's headquarters in Mount Vernon, New York. There, a team of artists, craftsmen, conservators and designers spent a year re-leading each of the window's sections with sodder, putty and reinforcing bars. They were then re-framed with triple-glazed aluminum frames that fit inside the College's Chapel of De La Salle and His Brothers. The last step was adding a one-inch layer of insulated glass on top of each window to ensure longtime preservation.

The Windows Arrive at Manhattan

The De La Salle Stained Glass Window Collection arrived on campus in early 2016, and the whole installation process took about six weeks. Since then, the collection has been admired on a regular basis for the first time in 40 years. Prior to that, the windows had fallen into a state of disrepair after the Barrytown property was sold by the Brothers' community in 1974. At Manhattan, they're not only visible; they're also the backdrop for all major campus events and weekly Masses held in the chapel.

Manhattan College President Brennan O'Donnell views *The Childhood of Saint John Baptist de La Salle*, a scene that takes place in Reims, France, where De La Salle grew up as the eldest of 11 children. De La Salle, his parents and siblings can be seen in the foreground, and his childhood home is illustrated in the background.



The Dedication Ceremony

More than 400 guests attended the Mass and De La Salle windows dedication ceremony on April 7, 2016, the Feast of Saint John Baptist de La Salle. To unveil the collection, blackout curtains that covered the chapel windows were removed one by one, and the significance of the scenes displayed in each were described to the audience. ☀

The Most Rev. John J. Jenik, Auxiliary Bishop for the Archdiocese of New York, presents and blesses each of the windows, along with the Rev. Erwin H. Schweigardt '61, Ph.D. (not shown).

Brother Dennis Malloy, FSC, gives the ceremony's invocation and acknowledges John Hannaway and James Casey for their perseverance in reclaiming the collection.



Christian Brothers Services' 2017 acquisition of BMT Management & Financial Consultants brought with it the company's wealth of experience, including one of its areas of expertise for investment consulting and developing socially responsible portfolios.

BMT's client base is entirely composed of religious organizations and their sponsored ministries. This client base deserves credit for being pioneers in Socially Responsible Investing (SRI), taking care to avoid investments in companies participating in businesses that are inconsistent with their Catholic values and choosing to pursue shareholder advocacy through proxy voting and engagement with management.

A desire to see their beliefs reflected in their investment portfolios is evident in the investment guidelines of these clients. They have long included encouragement of a proactive approach in seeking out companies that consider the following criteria:

- ☞ *a dedication to respect and enhance the quality of life with attention to fair labor practices and equal opportunity employment*
- ☞ *a commitment to make environmental stewardship a priority, working to address climate change and resource scarcity*
- ☞ *the drive to address health care access and income inequalities*

BMT is privileged to provide investment consulting services to 80 organizations with \$2.8 billion of assets. BMT investment consulting clients range in investment asset value from \$500,000 to more than \$200 million. In determining the appropriate asset allocation for each client's various segregated funds, BMT will consider future use of the invested principal compared to known liabilities and liquidity needs. BMT often assists in composing or updating Investment Policy Statements (IPS) and Guidelines for the client.

How does BMT provide this service? BMT is an independent firm not affiliated with any investment management firm, brokerage company or bank. John Tortolani and Bob Moody have provided investment consulting services for the past 46 years with Moody primarily responsible for this service.

Socially Responsible Investing—That's BMT

Companies are beginning to realize that paying attention to the social consequences of their products is good business. Investors are coming to that realization as well.

Christine Ackert and Eileen Alexanderson, more recent additions, and evidence of BMT's expanding investment consulting services, come with strong backgrounds in the investment management industry.

Ackert worked for 21 years as an independent investment adviser, providing special attention to social responsibility requirements of the firm's clients.

"Through my previous employment, I had the pleasure of knowing and working with BMT for over 20 years. Having been educated at Catholic schools through the university level, I am pleased to be a part of the BMT team and work more closely with such a well-respected and admired client base," said Ackert.

Alexanderson spent 24 years at Lazard Asset Management, an institutional money management firm, first as an analyst, then as a portfolio manager and Managing Director of U.S. equities. Alexanderson has been a longtime member of a number of investment committees for Catholic groups.

"I am proud to serve this client base which is responsible for a good part of the backbone of our country having built schools and hospitals and attended to some of the most neglected groups of our society with care and dignity," said Alexanderson.

The pair works to build a complement of investment managers for each client that fits with the established investment and social guidelines. BMT maintains a profile on managers it has vetted for potential use by clients. Investment managers on BMT's approved list acknowledge the relevance of Environmental, Social, Governance (ESG) factors to long-term value creation and have defined systems in place to provide both positive and negative SRI/ESG screening in developing their portfolios. The approved managers consider both financial fundamentals and social responsibility in vetting investments.

Other BMT investment team members include Richard Ficarrotta, who coordinates the development of quarterly investment performance reports and analyses, and Andrea Costa, who assists in researching potential managers for the BMT approved lists as well as manager compliance to the investment policy statement.

Though for some time, popular belief dictated that strong financial performance and socially responsible investing are mutually exclusive, **BMT holds firm** that integration of social responsibility and sustainability factors is mutually beneficial on both fronts. Corporations adopting these principles will consistently affirm that social responsibility does not come at the expense of corporate profit. The yield of attention to ESG factors like environmental impact, workplace policies, community impact and sustainable supply chains is **greater efficiency, productivity and profitability**.

In what is being called another tipping point, akin to the realization that globalization is a big deal, the *Harvard Business Review* has identified an important shift. Companies are beginning to realize that paying attention to the social consequences of their products is good business. Investors are coming to that realization as well. In fact, *Forbes* recently reported that "ESG investing—which assesses companies based in part on their environmental, social, governance policies—is a fast-growing segment of the financial landscape ... **many experts argue that an ESG strategy also leads to better returns.**"

In summary, the BMT consultants believe that the excellent, long-term performance of BMT clients' portfolios, composed of companies with these shared beliefs, is **proof positive** that there does not have to be a sacrifice in performance attached to socially responsible managed portfolios.

About BMT

A division of Christian Brothers Services, Brenner, McDonagh & Tortolani (BMT) was founded in 1972. Headquartered in Tarrytown, New York, BMT serves more than 280 Religious Institutes and many sponsored ministries in need of assistance with the management of daily operations including accounting and financial management, benefits eligibility management, human resources, investment consulting and real estate planning and sustainability studies. ☀

For more information about BMT's Financial Consulting Services, contact Eileen Alexanderson at 914.347.1600 or ealexanderson@bmtconsults.com, or Christine Ackert at cackert@bmtconsults.com.



When the Diocese of Erie needed to upgrade its websites, Christian Brothers IT & Website Services was there to help.

ITS—Changing the Look of a Diocese

The screenshot shows the Diocese of Erie website. At the top left is the Diocese of Erie logo with the tagline "Sharing the Catholic faith in northwest Pennsylvania". To the right is a language selection dropdown and a search bar. Below this is a navigation menu with links: About, Offices/Ministries, Vocations, Education, News & Events, Live the Faith, and How do I?. The main content area features a large banner with the text "TAKE TIME TO STOP AND SMELL THE ROSES" and a quote from Psalm 145:5. Below the banner are three columns of content: "Statements regarding sexual abuse in the church, and diocesan public disclosure list", "Opioid information" with a prayer card and booklet, and "Upcoming events and registrations" with a clock graphic. To the right is a "Diocesan News" section with several articles, including "BISHOP PERSICO WORKS TO PREPARE HIS PEOPLE FOR GRAND JURY REPORT" and "DIOCESE NAMES FAITH FORMATION DIRECTOR". Below the news is a "National/World News" section with articles like "Discalced Carmelites use time-honored skills to co..." and "Fight scandal by giving witness to the Gospel, pop...". At the bottom of the main content area is a "More News and Social Media" link and a "REPORT FINANCIAL MISCONDUCT" / "REPORT ABUSE" button. The footer contains "Connect with Us" (Staff Directory, Faith magazine, NWPACatholic.com), "Quick Links" (Employment, Protection of Children, Report Abuse, Events, Becoming Catholic, Pa. Catholic Conference), "MyDioErie" (All employees of the Diocese of Erie...), and "Get in Touch With Us" (429 East Grandview Blvd., Erie, PA 16504, P: 814-824-1111, E: info@ErieRCD.org). Social media icons for Facebook, Twitter, YouTube, and Instagram are also present.

The Diocese of Erie, Pennsylvania, needed a change—

not in mission or philosophy, in its websites. It had been years since the diocese had refreshed the look, feel and functionality of its text-based website, and it had outlived its usefulness.

Realizing a do-over was in order, two years ago, diocesan leaders assembled a team to search for an organization that would be able to not only redesign the main diocesan website, but also the sites for its 97 parishes, and all its various agencies, offices and ministries.

Kathy Papalia, the network administrator for the diocese, led the search team and began the process, sending Requests for Proposals (RFPs) to about a dozen companies, including Christian Brothers Services (CBS). Papalia was familiar with CBS and its Chief Information, Privacy and Security Officer Tom Drez through her association with the Diocesan Information Systems Conference (DISC). DISC is an organization that represents information technology (IT) staff from dioceses across the U.S. and Canada. CBS is also a DISC member. "When the diocese decided they wanted to start this project, CBS was right at the top of the list," she said.

CBS presented the Diocese of Erie with its XpressIT Website Update Xpress Content Management System (CMS). This "website in a box" puts administrators in direct control of their web content without the involvement of an IT staff.

Once selected in January 2017 for what would be a yearlong project, CBS had its full web team involved, from operations and development to customer service and user education. The diocesan team included Papalia, a website content manager and its communications director.

The process was completely collaborative and the lines of communication between CBS and the diocese were always open with regularly scheduled videoconferences. CBS designers took the website ideas supplied by the diocese and turned them into drawings and designs.

The two teams went through a draft review process for the design until the diocese was happy with the result.

Websites for the Parishes

One of the project goals was to improve contact and communication with parishioners while improving the connection between the parish and diocesan website and resources. With this in mind, CBS worked with the diocese to create and offer a website to all its parishes.

"From the Website Update Xpress, we made another product called XpressIT Parish Place, which is basically the same CMS, but we designed a front end on it that is specifically geared toward parishes with the features they would need," said Drez.

The CMS supplied by CBS is the underlying database "engine" for all the websites. The front end (what users see) is tailor-made to give the customer the look they want.

The features that are included in Xpress IT Parish Place are the result of CBS' research of parish websites in the Dioceses of Joliet, Illinois, and Beaumont, Texas. The research included documenting such data as website appearance, the people responsible for site maintenance and what information was most often included on parish sites.

The research showed that about one-third of the parishes have good sites, meaning active volunteers are available to keep the information current; one-third of the parishes run a website through a free service with ads, but do not have enough volunteers to keep the site up-to-date; and another third of parishes do not maintain a website at all.

This inconsistency of parish websites was one of the issues the Diocese of Erie wanted to address, and a key reason why they selected CBS to assist them with their project. With Parish Place, functionality comes right out of the box, allowing the parishes to control their news, information, Mass times and more while maintaining a consistent look and feel with the diocesan site. The Parish Place application does not give the diocese control over each parish site, but there are links back to the diocese from all the parish sites. The system is separate but connected. ▶▶

We Are You. We Get You.

Papalia said price and ease of use were other contributing factors in the final decision to hire CBS over the competition.

"Every time I asked Tom Drez questions, the answers were easy. Every time I had contact with him, I felt that it was much easier to deal with Tom. He simplified the pricing process. One of the other companies would have penalized the diocese for each parish not on the system in four years. We will probably never get 100 percent of our parishes on this system, so that was just a dark cloud that was over my head. I didn't want us to be paying for parishes we weren't serving. CBS said if you don't get everybody, that's OK. There aren't any penalties."

Parish Place websites cost \$99 a year to host with a one-time \$200 setup fee, which includes two hours of time to make sure the Domain Name System is operating properly. The fee includes any additional help the customer may need during the process. There are no ads on the websites, and ease of use is the key component. The administrator logs in, fills out a setup screen, puts in their parish logo and changes the color scheme. That's it.

Drez said CBS keeps its rates as low as possible (\$99 per hour), not just to gain a competitive advantage, but to allow Catholic organizations to reduce their IT or web burden and focus instead on their mission. As a 501c3 nonprofit Catholic Church organization, CBS is in a unique position to understand the needs of dioceses and parishes.

"We are owned by the Lasallian Christian Brothers, a teaching religious order. We are you. We get you," he said.

Successful Launch

The parish websites were the first to start launching in January 2018. The main Diocese of Erie site followed suit in May. Currently, about one-third of the diocese's parishes are using the CBS websites. The next step, according to Papalia, is to gauge interest and bring aboard another group of 31 parishes that have no online presence at all.

"Hopefully, the lure of free setup, free training, free hosting, free support and the free services of our graphic artist will tempt them," she said.

Since the launch, she has received emails from parishes letting her know how easy it is to manage their sites and from others who want to be next.

Next Steps

Not wanting to rest on the successful launch, CBS and the diocese are now in talks for Phase 2 of the project, which is to create websites for the diocese's Catholic Charities organizations and its schools.

The two sides have also started a conversation that would revamp the underlying donation infrastructure at the diocesan and parish level. CBS has a partnership with Coleman Group, a company that caters exclusively to Catholic organizations. Coleman's "Give Central" is an online giving infrastructure that provides the power that goes behind the "Donate" button on websites. The company also has a mobile app that gives donors the ability to set up reoccurring giving schedules on a weekly, monthly or quarterly basis. A donor's credit card transaction is branded, for example, as "Diocese of Erie," not as "PayPal" or anything else on its statement. The fee per transaction is less than with PayPal or a similar payment method. Dioceses can even send email communications to push messages out in a branded fashion to their donors. A full explanation of the service is at givecentral.org

As for now, Papalia and the Diocese of Erie are happy with the results of the project.

"The hosting is easy; the design process was easy; and the planning, even before we accepted CBS as a vendor, was easy."

That is music to Drez's ears. "I don't think it could have turned out better and when you end up with a happy customer and come in on time and on budget, that's great," he said.

CBS has now completed two successful diocesan-level web projects. The Diocese of Joliet, completed six years ago, was the first. Drez said because of the ever-changing landscape in website evolution and end-user usage, the diocese is now looking to update.

"Back when we finished the Diocese of Joliet's website, being responsive for mobile devices wasn't a thing," said Drez. "Now, as you can see with the Diocese of Erie, if you pull it up on any mobile device it adapts, fits, performs and looks great. Times are changing and we are changing with them." ☀

For more information on Christian Brothers Services IT & Website Services, visit www.cbsservices.org/IT-and-website-services.html. A Parish Place demonstration is at <https://parishplace.com>.

CBS Brand Refresh

Christian Brothers Services (CBS) unveiled its new look August 6, rolling out a refreshed website and marketing materials that reflect the Member Advisory Board's (MAB) and senior leadership's desire to emphasize its core commitment to customer services.

Over the years, CBS has used imagery ranging from a tranquil beach scene to a mosaic window to religious architecture. This new look features the members CBS serves. With customer service being at the core of CBS company values, it was important to the MAB that its outward facing image portrays this philosophy.

"CBS has long been known for our exemplary customer services," said Terry Arya, chief marketing officer. "As an organization, CBS continues to strive to find ways to more efficiently and effectively service our members. The new website design refresh is just another step in working toward a continued effort to provide great customer services to our members."



A significant effort has been made to make the new website design easier to use and more efficient for members and the public to find information. The public now will have more access to information regarding CBS services through the new Resources & Tools sections, which were only previously accessible after login. Navigation throughout the site has been made easier by eliminating some of the drop-down menus and switching to a more user-friendly tile format.

The products and services offered through and by CBS are featured prominently on the newly designed homepage of the website. This section allows you to access more information about the Trusts and consulting services offered as well as the newly created Resources & Tools sections.

In addition to the products and services section, we have made it easier to access resources that our members can reference on a day-to-day basis as they manage their ministries. Maintaining Your Health information flyers are easier to locate, offering members valuable information about keeping healthy and the benefits of the Christian Brothers Health Benefit Services.

"While the look and feel of the website and marketing materials has changed, Christian Brothers Services is still the same faith-based, dedicated Catholic organization it has always been since it was launched close to 60 years ago," said Arya. "Our mission is still to exemplify the Lasallian tradition by understanding the needs of our members, protecting the human and financial resources of institutions and guiding member organizations in finding practical solutions to business needs." ☀



Christian Brothers Services Earns Top Contact Center Award for Fifth Year in a Row

Recognizing its dedication to delivering value to its members, Benchmark Portal prized the Christian Brothers Services (CBS) customer care team with the Top Contact Center – Small Center Category award for 2018. This marks the fifth year in a row the CBS customer care team takes home the honor.

The Top Contact Centers Contest compares the performance of contact centers throughout North America by evaluating key metrics against other centers based on their size. Entries are cross-checked, validated and approved by certified contact center experts and the resulting submissions are scored based on both quality and cost-efficiency.

"Receiving the Benchmark Portal Award for the fifth year in a row reaffirms the level of exceptional service provided by our customer care team," said Adam Smith, director of operations for the Health Benefit Services (HBS) division. "HBS' management team infuses a culture of 'best in class' service accompanied

by Lasallian values, putting the primary focus on the member experience. Effective and efficient processes continue to evolve to consistently deliver high-quality service. Our customer care representatives take a vested interest in each and every call. Congratulations, team!"

Since the Top Contact Center Contest process is based entirely on statistical comparison to the nation's largest and most respected database of contact center metrics, the competition can objectively identify centers that are achieving superior results and customer service both in financial and qualitative terms.

The Top Contact Center Contest grouped submissions into four categories for this awards program. Each center was compared to a wide variety of industries and assigned numerical ratings. As a result, Christian Brothers Services was determined to be a Top Contact Center in North America. ☀️

MarCom Awards

The MarCom Awards is an international creative competition that recognizes outstanding achievement by marketing and communication professionals. Entries come from corporate marketing and communications departments, advertising agencies, PR firms, design shops, production companies and freelancers. The winners range in size from individual communicators to media conglomerates and Fortune 500 companies.

Platinum Award
OutReach Magazine, Vol. 8, No. 2
Print Media Magazine Category

Gold Award
"A Room at the Inn"
Feature Article Category



Communicator Awards

The Communicator Awards is the leading international awards program recognizing big ideas in marketing and communications. Founded more than two decades ago, The Communicator Awards receives more than 6,000 entries from companies and agencies of all sizes, making it one of the largest awards of its kind in the world. The Communicator Awards is sanctioned and judged by the Academy of Interactive & Visual Arts, an invitation-only group consisting of top-tier professionals from acclaimed media, communications, advertising, creative and marketing firms.

The Communicator Awards honors work that transcends innovation and craft – work that made a lasting impact, providing an equal chance of winning to all entrants regardless of company or agency size and project budget.

Award of Distinction
OutReach Magazine, Vol. 8, No. 1
Magazine/Nonprofit Category

Award of Distinction
"Taking Care of What You Love"
Writing/Feature Article Category



The Award of Distinction is presented for projects that exceed industry standards in quality and achievement.

Hermes Creative Awards

Hermes Creative Awards is a global competition for creative professionals involved in the concept, writing, and design of traditional and emerging media. Hermes Creative Awards recognize outstanding work in the industry and are administered by the Association of Marketing and Communication Professionals. The international organization consists of several thousand marketing, communication, advertising, public relations, digital media production and freelance professionals. Judges are industry professionals who look for companies and individuals whose talent exceeds a high standard of excellence and whose work serves as a benchmark for the industry.

Gold Award
Christian Brothers Services Facebook page
Interactive Media/Social Media Category

Gold Award
Christian Brothers Services website
Interactive Media/Website Category

Honorable Mention
Christian Brothers Services Twitter page
Interactive Media/Social Media Category





Brother Joel Damian with a testimonial plaque presented to him by the Brothers at their province convocation at St. Mary's University in Winona, Minnesota, in August 1987. The plaque acknowledges the many schools and additions he was responsible for building as well as the many programs he developed at Christian Brothers Services and elsewhere. The design and calligraphy of the plaque has a Lasallian connection as well. It is the work of Stanley Kancewick who graduated from De La Salle Institute in Chicago in 1932.

John Tortolani, Managing Director of BMT Management & Financial Consultants, a division of CBS, discussed his experiences with Damian.

"Brother Joel was an innovator," said Tortolani.

"In addition to launching CBS and constantly expanding its services, he had a major, direct, positive impact on the financial status of many religious orders."

In the late 1960s, Damian introduced the concept of including members of religious orders who had taken the vow of poverty into the U. S. Social Security system. He took this idea on a national tour, working diligently with politicians, explaining the concept to such members.

In 1972, Congress agreed to extend coverage to those orders, if the religious order made an irrevocable election for coverage for its entire active membership and lay employees. Within 24 months of the passing of the law, the vast majority of religious orders having members with the vow of poverty, elected and paid for coverage and began to receive benefits.

"The more you reflect on what he did, you understand how much he accomplished for Religious Institutes, their members and lay employees," said Tortolani. "To this day, we continue to realize the benefits of his ideas and efforts."

Damian didn't stop there. He also helped initiate and establish trusts to cover health benefits for members of religious orders and the lay people who worked alongside them in their ministries. He was instrumental in creating the Employee Benefit Trust first for Lasallian schools and worked with other religious orders to form both the Religious Comprehensive Medical Trust and the Community Deductible Trust. Damian then began to tackle the challenge of providing property and liability coverage for Religious Institutions.

Peter Durkalski is a member of the CBS board of directors who, during his time at Arthur J. Gallagher Company worked with Damian along with attorney John Gurley to develop the Risk Pooling Trust. Durkalski recalls how it was Damian's vision and his innate ability that allowed brothers and sisters to focus on their mission, eliminating some of their burden.

Durkalski believes it was serendipity that brought himself, Damian and Gurley together. The Risk Charitable Trust Act just emerged in the 1970s, allowing charitable organizations to band together to pool and share resources and Damian decided it was paramount to capitalize on this opportunity. Basically, as the first group to do so, they were creating an entirely new concept, building plans for property and casualty that never existed before, ultimately submitting an application to the Department of Insurance and making history.

Working with Gurley who was an attorney with Lord, Bissell & Brook and legal representative of Lloyd's of London, they were able to work behind the scenes to use a combination of self-insurance along with traditional excess insurance policies to provide the coverage organizations needed.

Again, Damian went state by state introducing the concepts to all the different religious organizations.

"Damian was an entrepreneur, a CEO, a thinker. Once we were approved—he went on a tear. He was adamant—he was going to bring in every religious order," said Durkalski. "People were saying what we wanted to do was impossible. Brother Damian would answer, turn to one of us and smile, tell them how it's done—and the room would go silent as we gave them the answers. The key thing was Brother Damian was like a quarterback, handing off the play to one of us when needed, yet he stood up and made it known that he personally vouched for this. He had the mindset and the ability to have everyone else see it."

By 1979, Damian orchestrated the formation of the Risk Pooling Trust for CBS, a cooperative "Church Plan" of committed Catholic Church organizations that offers a broad package of property/casualty coverages and optional limits designed to protect each member against financial loss from their religious and charitable activities. The trust began with 100 Catholic organizations and has grown to nearly 1,500 Catholic organizations.

After the Risk Pooling Trust was successfully established and launched, Damian worked with the Arthur J. Gallagher Company to establish The National Catholic Risk Retention Group (TNCRRG), a Vermont-based captive insurance company which provided the risk pooling concept to Catholic dioceses with regard to liability coverage.

In 1981, together with Brother Louis DeThomasis, Damian founded Christian Brothers Investment Services (CBIS) to help Catholic institutions and dioceses steward their investments and at the same time be aligned with the tenets of the Catholic faith.

It is fitting that in honor of Damian and such visionary thinking, CBS is announcing an endowment to Lewis University, Romeoville, Illinois, that will continue to instill entrepreneurial spirit through the "Brother Joel Damian, FSC, Business Plan Competition" for years to come.

The business plan competition, which began in 2013, is the marquee event hosted by Lewis University's Lowell Stahl Center for Entrepreneurship and Real Estate. The ongoing program is designed to help student entrepreneurs launch new business ideas. Open to all Lewis University students, the program provides feedback and guidance from faculty, Lewis alumni and industry professionals. The top teams compete in the finals, where they present their ideas live in front of a judging panel. Funds are awarded to top performers to assist in startup costs for their business model.

"We are extremely grateful for the generosity of the board of directors of Christian Brothers Services to support and grow the Brother Joel Damian Business Plan Competition into a regionally recognized and socially responsible entrepreneurial event, infused with the Lasallian spirit," said Ryan D. Butt, J.D., M.S.A., dean, College of Business and Graduate School of Management. "We are pleased that it will honor and recognize Brother Damian for years to come, sharing his story that continues to have a profound impact for religious communities and congregations nationwide. We are sure the narrative of his success will

help to guide our students into successful careers, reflecting the tradition of the Christian Brothers in offering excellence in education."

The intent of the endowment is to help offer a platform that fosters entrepreneurial thinking and transforms thoughts into reality, better preparing students to compete in today's global world.

"Brother Damian was an entrepreneurial genius and we believe this endowment will foster the kind of spirit and leadership that we hope can match his vision for generations to come," said Brother Michael Quirk, FSC, E.D., president and CEO, Christian Brothers Services.

Damian was a pioneer of his time and was instrumental in creating CBS and lauded for his work throughout his lifetime; his accomplishments were numerous along his path as a Christian Brother.

He was born Charles Wilhelm in Minneapolis, Minnesota, and later attended De La Salle High School in his hometown. In 1933, at 15 years old, he entered the Juniorate in Glencoe, Missouri. Three years later he entered the Novitiate where he received the habit and religious name of Brother Joel Damian.

He completed his undergraduate degree in 1940 at St. Mary's College in Winona, Minnesota, and was assigned to teach at St. Patrick High School in Chicago. He served there as sub director until 1946 when he was transferred to St. Mary's College in Winona until 1948. Next, Damian was assigned to Christian Brothers College High School in St. Louis, Missouri, but returned to Chicago in 1952 as director of St. Mel High School. In 1954, he was appointed Auxiliary Visitor of the District where he stayed until 1967. In that position, Damian supervised the planning and construction of Catholic high schools throughout the Midwest, 51 buildings or major additions in all.

In 1966, Damian came to Lewis University to establish the national headquarters of the Christian Brothers and also to erect a Novitiate and Scholasticate. He was on the first board of directors at then-Lewis College and helped move Lewis to university status as a Trustee. He was named executive secretary of Christian Brothers Conference and it was then that he established employee benefit programs for Christian Brothers' lay associates and was consulted by numerous dioceses in establishing retirement plans for their priests and employees. Damian died in 1991 at age 73, having been a De La Salle Christian Brother for 58 years. ☀



Mary J. Foley

Mary J. Foley brings 35+ years of experience to the not-for-profit world and offers a wealth of strategic leadership skills and insights to the educational, religious and social service arenas. She has worked with hundreds of not-for-profits, internally as a director of development, at the board level, and through a wide variety of consulting engagements.

She joined CBS last year as Managing Director of Catholic School Management. Mary is helping us expand resources and opportunities for all our members in the areas of fundraising, organizational development, communications and stewardship under the Mission Advancement banner.

You came to Christian Brothers Services after running your own firm for 25 years. How has that transition been for you?

I've been aware of the tremendous work of CBS my entire career, so when Brother Michael Quirk first reached out to me I was very intrigued. Foley Consulting, Inc. was started to enable our clients to better meet the needs of those they serve. The "never say no" attitude here at Christian Brothers Services, where we are always looking for new and creative ways to assist our members, is a perfect fit. Our clients, most of whom were familiar with CBS, were delighted with the news and I am very pleased to be here.

At an introduction of you for a speaking event, they said "Mary attended Catholic grade school, high school, college and graduate school ... and it worked." Meaning what?

My parents purchased a house specifically so my brothers and I could walk to Catholic school – at every level. And while I don't know that their intent was that I would focus so much of my career in the Catholic sector, the impact of that education has left an indelible mark and ensuing gratitude. I feel enormously blessed, not only to have had that educational upbringing, but also to work in support of such noble organizations.

You've always worked with Catholic schools. How is Catholic School Management different?

There are many firms that offer advancement services to Catholic schools, but CSM also addresses the internal operations – academics, Catholic identity, administration, guidance and counseling, mission and governance, instructional technology – as well as strategic planning, fundraising, enrollment, alumni, etc. We enable ALL parts of the school to move to the next level of excellence and further the ministry of Catholic education.

Mission Advancement is a new venture for CBS. How did that come about?

Because we "never say no" ... In typical CBS tradition – responding to the needs of our members. Many of the organizations we serve want to strengthen their boards, raise more money and improve communications. Often they seek presenters for retreats, workshops, webinars and professional development programs for staff, leaders and volunteers. We work with our clients to understand their unique needs and deliver tailored services that will enable them to meet their goals.

What's a typical week or month like for you? What do you enjoy most?

Anything but typical. A board retreat, solicitation strategy for a capital campaign client, a webinar on alumni, an enrollment summit, candidate interviews for a president search process ... It could be a single school, a religious order, a sponsored work, a diocese, a social service agency. It's the best job in the world because the people with whom I am privileged to work – clients and staff alike – are so wonderfully motivated.

Enjoy the most? Probably the seminar series – where a group comes together throughout the year, and you can see them not only learn new strategies, but also put them to work, share with one another, and truly advance. Teaching them to fish, so to speak, is my favorite.

The quote below is a favorite of Mary's from the Pastoral Letter on Stewardship.

"Who is a Christian Steward? One who receives God's gifts gratefully, cherishes and tends them in a responsible and accountable manner, shares them in justice and love with others, and returns them with increase to the Lord." ☀



The Resource Center for Religious Institutes 2018 National Conference - Orlando, Florida October 30 - November 2

Introduction to Government Programs

Wednesday, October 31
4:00 p.m. - 5:30 p.m.

Constance Neeson - Director of Benefit Eligibility Management

This workshop will outline the basics of the various government programs for individuals new to the process of accessing benefits. Government programs to be discussed include: Social Security, SSI, Medicare (A, B, C & D), Medicaid, QMB, SLMB, QI-1, the Low Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP). This information will assist those new to the position of Benefit Eligibility Coordinator of each religious order.

The RCRI Gathering is sponsored by Christian Brothers Services and Christian Brothers Investment Services.

Property Coverage Game - Are You Covered or Will You Pay?

Thursday, November 1
2:00 p.m. - 3:30 p.m.

Randy Grundy - President & EGA RGA Claims Management

Jeff Harrison - Risk Control Coordinator

When it comes to paying for property losses, many organizations have high deductibles that are out of pocket expenses. If your ministry should have a number of losses, paying these deductibles can cut into your funds. What if the loss isn't covered? Is your ministry prepared to pay for the entire loss? Property exposures and coverages have changed significantly over the past 25 years. Cybersecurity, fire, employee dishonesty, flood and more can put your ministry's finances at risk. Using a fun interactive game played by all, this workshop will review a wide variety of coverages, examples of actual losses that have been denied, and discussion on how best to protect your ministry moving forward.

Government Programs Update 2018 - 2019

Friday, November 2
9:00 a.m. - 10:30 a.m.

Constance Neeson - Director of Benefit Eligibility Management

This workshop will provide a summary of all the changes in government programs for 2018, with a look ahead to pending program changes in 2019. Discussion will include: Social Security, SSI, Medicare (A, B, C & D), Medicaid, QMB, SLMB, QI-1, the Low-Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP), as well as a discussion on the potential impact of legislation on benefit participation for members of religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order.



Constance Neeson



Randy Grundy



Jeff Harrison

THE IMPORTANCE OF TRANSPARENCY IN GIVING



Regular donations fuel your church and its mission, but asking for money can make everyone uncomfortable. However, your confidence in making the ask—as well as your parishioners' confidence when donating gifts—can be boosted by one simple technique: transparency.

Here are three easy steps to help you increase the transparency in your fundraising efforts so that your parishioners feel like they're part of the process, and so that your church continues to thrive.



01 TELL PARISHIONERS WHERE THEIR GIFTS ARE GOING

Nobody wants to feel like they're throwing money into a void. The most important thing you can do when you fundraise is tell your parishioners what sorts of projects, needs and expenses their gifts are supporting. You could keep an updated list of expenses on your website or bulletin. You could highlight one expense per month on which to focus your fundraising efforts. You can use social media to tell your followers exactly where their gifts are being used that day. There's no correct way to do this—the point is to make sure that the information is accessible and clear, so that donors feel assured that their funds are going to the right place.

02 ALWAYS SAY "THANK YOU"

When a donor receives a personal letter of thanks after making a donation, they feel like their contribution actually means something, and isn't just disappearing into a swirl of receipts. Thank you messages are an important part of transparency in giving—after all, it's vital to acknowledge the transaction that just took place. And remember, you can always post a general thank-you to your donors in your bulletin, on your website, or across social media, but nothing should replace the personalized, one-to-one thank you note. It guarantees that your donors feel seen, heard and appreciated.



03 KEEP EVERYONE UPDATED

While you've already told your donors where the money is going, it's just as important that they see where their money ends up—and what sorts of effects it had. This is truly transparency in action: you asked them for a gift, told them what you would use it for, and you are now ready to show them the results.

Let's say a group of parishioners donated to a church repair fund. Consider sending them an email with pictures of the repairs in process and an updated completion date. If they donated to help a specific group, have a spokesperson from that group write a note of thanks—or speak during a service—to give an update on the group's progress.

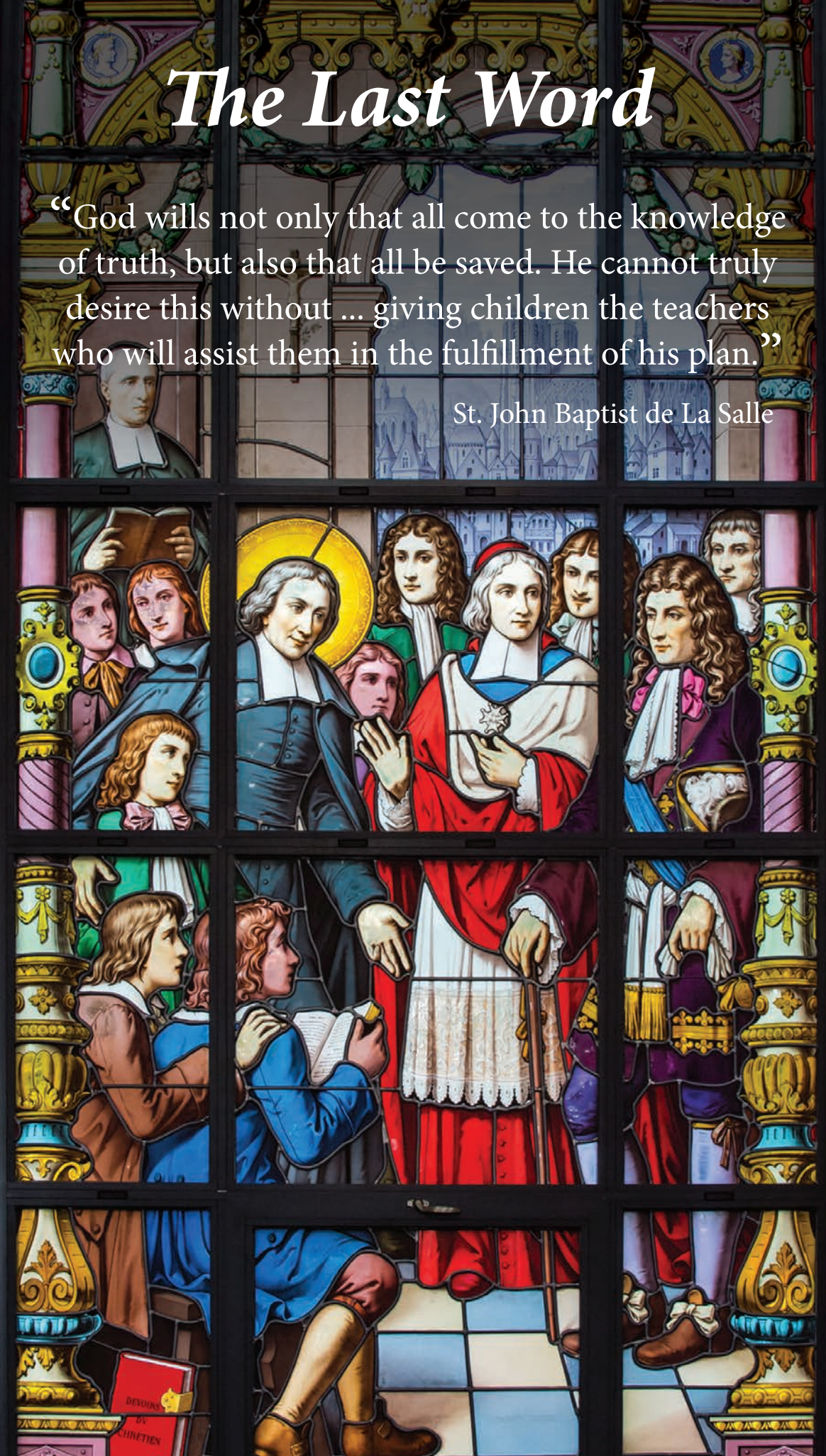
Seeing the outcome of their donations will make people feel more comfortable donating again, and it's a fantastic way to develop comfortable, long-lasting connections between donors and your church. And all it takes is simply letting your donors in.

To learn more, visit givecentral.org
Phone : Bridget Daly at 312.929.2306
Fax : 312.893.2038
Email : bdaly@givecentral.org

The Last Word

“God wills not only that all come to the knowledge of truth, but also that all be saved. He cannot truly desire this without ... giving children the teachers who will assist them in the fulfillment of his plan.”

St. John Baptist de La Salle





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CBS Fall 2018 Webinar Schedule

| | RISK MANAGEMENT | HEALTH BENEFIT SERVICES | RETIREMENT PLANNING | TECHNOLOGY | CATHOLIC SCHOOL MANAGEMENT |
|-------------|---|--|---|--------------------|--|
| October 4 | From Service Animals to Comfort Pets: What You Need to Know | | | | |
| October 11 | | | | IT Risk vs. Reward | |
| October 18 | | Group Health Savings Accounts: The ABC's of HSA's | | | |
| October 25 | | | | | Subject to Change: The Life and Times of the Catholic School Administrator |
| November 8 | Sexual Harassment and Abusive Conduct in the Workplace 1:00 - 3:00 p.m. CST | | | | |
| November 15 | | | Retirement Plan Options: Employers Providing a Defined Benefit Plan | | |

All webinars are from 1:00 – 2:00 p.m. CST. (Except where noted)