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**Mission Statement of the  
Archdiocese of Milwaukee:**

To proclaim the Gospel of Jesus Christ through his saving death and resurrection by calling, forming and sending disciples to go and make new disciples. As a people, we are called to encounter Jesus and grow as disciples through the sacramental life of the Church.

## Budget Submissions

**Due Date:** Monday, June 1, 2026 (both balanced & deficit budgets)

**Submission:** Send full budget package [parishfinance@archmil.org](mailto:parishfinance@archmil.org). In the subject line of the email, include the parish/schools' three-digit code, name, and city.  
*For example: A99 St Adelina Milwaukee – FY 2026-27 Budget.*

## Submission with Budget Template

Budget Package should include:

- 1) Excel Budget Template, will all applicable tabs filled out.
- 2) Signed Cover Sheet (may be printed from Budget Template, signed, and scanned as a PDF)
- 3) FY 2025-26 Year-to-Date (YTD) Income Statement through February 28, 2026 or later
- 4) Balance Sheet as of February 28, 2026 or later

The budget template may be downloaded from [Parish and School Financial Consulting Resources](#), under the “Template” column.

## Submission without Budget Template

Budget Package should include:

- 1) Contact Information\*
- 2) Signed Cover Sheet (may be printed from Budget Cover Sheet Excel file, signed, and scanned as a PDF)
- 3) Deficit Budget Questions\* (if deficit budget is submitted or if prior two CFS files reported deficit activity)
- 4) Staff Assumptions\*
- 5) School Enrollment Assumptions\* (if school budget is included)
- 6) Budget file in Excel format. Budget file should include:
  - a. YTD Income Statement through February 28, 2026 or later
  - b. Balance Sheet as of February 28, 2026 or later
  - c. FY 2026-27 Budget
- 7) Include information about assumptions used (staffing, inflation rate, revenues (including school tuition), and expenses). Explain any significant changes in the budget from prior years. Note that any increases in envelope and offertory over 3% should include an explanation.

\*These items are included as separate tabs in the budget cover sheet Excel file. These may be submitted in Excel form or printed and scanned as PDF files for submission. The budget cover sheet may be downloaded from [Parish and School Financial Consulting Resources](#), under the “Template” column.

## FY 2026-2027 Budget Assumptions

Archdiocesan Assessment Rate	0.00%	No Change, Still 6%
<b>Priest Compensation Assumptions:</b>		
Priest Compensation	3.25%	
Priest Professional Expense Allowance	\$7,900.00	
Priest Pension	6.10%	
Priest Retreat allowance	\$600.00	
Priest Continuing Education Allowance	\$1,200.00	
Priest Long Term Disability Premiums	\$400.00	
<b>St Raphael Health Plan (SRHP) Assumptions:</b>		
Medical Insurance, premium increase for Jan 1, 2027	8.00%	
Dental Insurance, premium increase for Jan 1, 2027	5.00%	
Vision Insurance, premium increase for Jan 1, 2027	0.00%	No Change Expected
<b>Participants' Indemnity Plan (Catholic Mutual Group):</b>		
PIPIT (property, casualty & liability)	7.00%	
Workers' Compensation	5.00%	
Critical Illness	0.00%	No Change Expected
Hospital Indemnity	0.00%	No Change Expected
Accident Protection	0.00%	No Change Expected
<b>Church Unemployment Pay Program (CUPP)</b>		
Administrative Fee, per person (priests excluded)	\$17.00	
IRS Mileage Reimbursement, per mile (effective Jan 1, 2026)	\$0.725	
<b>School Choice</b>		
Students in grades K4, per student, 0.6 FTE	\$6,526.20	
Students in grades K5, per student, 0.5 FTE	\$5,438.50	
Students in grades K5, per student, 0.6 FTE	\$6,526.20	
Students in grades K5, per student, 0.8 FTE	\$8,701.60	
Students in grades K-8, per student, 1.0 FTE	\$10,877.00	
Students in grades 9-12, per student, 1.0 FTE	\$13,371.00	
Special Needs Scholarship Program (SNSP), Full Scholarship	\$16,049.00	
Special Needs Scholarship Program (SNSP), Partial Scholarship K-8	\$10,877.00	
Special Needs Scholarship Program (SNSP), Partial Scholarship 9-12	\$13,371.00	
<b>School Assessment</b>		
K3/K4/K5, per student	\$6.40	
Grades 1-8	\$8.15	
Elementary School Marketing Fee, per student	\$10.00	
Elementary School Professional Development Fee, per school	\$400.00	
Secondary School Assessment, per student	\$8.50	
Secondary School Marketing Fee, per student	\$10.00	
Secondary School Professional Development Fee, per school	\$400.00	

## Fiscal Year 2026-27 Budget

All parishes and schools in the Archdiocese of Milwaukee are required to prepare and submit an annual budget package to the Office of Parish and School Financial Consulting. The [Parish Financial Management Manual](#) (PFMM) discusses budget preparation in Section 4.0.

**Due Date:** Monday, June 1, 2026 (both balanced & deficit budgets)

**Submission:** Send full budget package [parishfinance@archmil.org](mailto:parishfinance@archmil.org). In the subject line of the email, include the parish/schools' three-digit code, name, and city. *For example: A99 St Adelina Milwaukee – FY 2026-27 Budget.*

### Reminders:

- a) Cover sheets must be signed by the pastor, both trustees, and the finance council chair. *If any one of your signors is expected to be absent when the budget is reviewed and the cover sheet is signed, please contact the Chancery Office to find out how to delegate signatures during a planned absence.*
- b) Budgets should be submitted for operations and must include capital expenditures paid out of operations or unrestricted savings. If the parish is capitalizing and depreciating assets, depreciation expense should be included in the budget. Please include notes indicating expected cash outflows for capital purchases.
- c) Restricted revenues and restricted expenses should not be included in the operating budget. Restricted revenues and expenses should be budgeted separately.
- d) The use of reserves may not be budgeted as income. If the parish/school is in a deficit situation, and the use of reserves is required to “balance the budget,” the budget should be submitted as a deficit. The availability and planned use of the reserves may be included in the responses to the deficit budget questions.
- e) Any parish that approves a deficit budget or has operated at a deficit for the two previous completed fiscal years must obtain the approval of the Archbishop (PFMM Appendix 4-I, #2). For this approval, fill out the “Deficit Budget Questions” tab in either the Budget Template or the Budget Cover Sheet.
- f) If not using the Budget Template, please include information about assumptions used (staffing, inflation rate, revenues (including school tuition), and expenses). Explain any significant changes in the budget from prior years. Note that any increases in envelope and offertory over 3% should include an explanation. See page 1 for details on what to include.
- g) If your parish school participates in Wisconsin School Choice, please confirm with your auditors that your budget meets the Department of Public Instructions (DPI's) requirements (DPI budget due date is June 30<sup>th</sup>).

## Annual BAAM (Business Administrators of the Archdiocese of Milwaukee) Retreat Wednesday March 18, 2026 St. John Neumann Church, Waukesha

As part of Corpus Christi Parish, St. John Neumann Church is located at 2400 W State Road 59, Waukesha. This year's retreat will be led by Fr. Francis Assisi Sebamalai, associate pastor at St. Margaret Mary Parish.

The retreat schedule:

8:30 am - Mass at St. John Neumann

9:00 am - light breakfast in Neumann Hall (lower level) - Welcome and Introductions

9:30 am - Retreat presentation

10:15 am - Break, confession, private devotion time

11:00 am - Retreat presentation (continued)

11:45 am - Lunch (if preordered)

Please RSVP here: [BAAM Retreat RSVP - March 18, 2026](#)

## Upcoming Events from the Stewardship Office

Cindy Lukowitz, Director of Stewardship, will be hosting a number of events in the coming weeks. Click on a date below to register.

Finding Volunteers: Tips, Tools, and a Little Holy Spirit Webinar  
[Thursday, March 5<sup>th</sup>, 10:00am](#)

North Regional Meeting @ St Catherine of Siena – Ripon  
[Wednesday, March 22<sup>th</sup>, 9:00am – 1:00pm](#)

Central & South Regional Meeting @ St. John Neumann – Waukesha  
[Tuesday, March 17<sup>th</sup>, 9:30am – 1:00pm](#)

Fall Appeal Fatigue? Weekend Renewal to the Rescue! Webinar  
[Wednesday, April 15<sup>th</sup>, 1:00pm](#)

Questions? Contact Cindy at 414-769-3572 or [LukowitzC@archmil.org](mailto:LukowitzC@archmil.org).

## Parish Communication Assistance

Hello again! Kelsey DeMarais here. I've met many of you through trainings, meetings, etc. I am a resource to parishes, especially regarding your communication strategies. Any parish staff or volunteers who are responsible for communication (bulletin, website, social media, etc.), please reach out at any time with questions, concerns or even success stories: [demaraisk@archmil.org](mailto:demaraisk@archmil.org).

To God be the Glory!

### Join a Parish Communication Virtual Meet-up

Many parish staff who are in communication roles have asked about gathering more regularly. Ask and you shall receive! Please join us on **Monday, March 9**, from **10-11 a.m.** for prayer, connecting with fellow communication professionals and volunteers, and discussing a communication-related prompt. We will discuss if meeting on a regular basis is helpful to you all!

#### Join:

<https://teams.microsoft.com/meet/23898008101966?p=KEnHZbxTkuSGEFKDMT>

Meeting ID: 238 980 081 019 66

Passcode: MC9tn3JR

#### KELSEY DEMARAIS

*Director of External Communication*

P: (414) 769-3466 | C: (262) 744-0049

[demaraisk@archmil.org](mailto:demaraisk@archmil.org)

## Upcoming Microsoft Teams Webinars

The following training opportunities will be offered by Microsoft Teams Webinars over the next few months.

Registration is required to attend. Please click on a date to register.

**Faithful Finances: Accounting 101 for Non-Profit Accounting**, presented by Parish & School Financial Consulting.  
[Tuesday, March 24<sup>th</sup>, 10:00am](#)

**Managing a Multi-Generational Workplace Without Losing Your Mind (Or Your Mission)**, presented by Parish & School Human Resources.  
[Thursday, April 23<sup>rd</sup>, 9:00am](#)

**2026 Missionary Cooperation Plan (MCP)**, presented by Letzbia Laing-Martinez.  
[Thursday, May 7<sup>th</sup>, 10:00am](#)

**Faithful Finances: Priest Compensation**, presented by Parish & School Financial Consulting.  
[Wednesday, June 3<sup>rd</sup>, 10:00am](#)

Recorded training sessions and presentations, if available, may be viewed here:

<https://www.archmil.org/offices/parish-school-financial-consulting/training.htm>

## Diaconate Formation

Diaconate Formation invites men who wish to explore a vocational calling to the ministry of the diaconate to attend an Inquiry for Discernment Session.

To see the current schedule please visit the registration page here:

<https://archmil.regfox.com/diaconate-discernment-sessions>.

## Employee Investigations: Seeking Truth in the Spirit of Lent

Lent is a season that calls us to reflection, repentance, and renewal. These same values guide how we respond when HR concerns or employee complaints arise within our parish/ school community.

At times, these concerns must be reviewed through a formal workplace investigation. While the word “investigation” can feel intimidating, at its heart, an investigation is simply a structured and respectful way of seeking the truth, resolving disputes fairly, and moving forward with renewed trust. When done right, conducting an investigation can provide a window into the beauty of Lent and be great preparation for the Easter season.

### Reflection: Seeking Truth with Care

Reflection invites us to pause, listen, and examine situations honestly. In an investigation, this means gathering facts carefully without assumptions and listening to all perspectives with respect. Just as Lent encourages honest self-examination, investigations require thoughtful consideration of what has occurred, grounded in truth rather than emotion or rumor.

### Repentance: Consistency in Accountability

Repentance is about acknowledging when harm -or policy violations- have occurred and identifying the responsible parties. In the context of investigations, this means addressing behavior that does not align with our values or expectations and holding responsible individuals accountable in a fair and consistent manner. Just as Lent is a season of repentance that leads to renewal, consistently holding individuals accountable for workplace violations is the best way to create and maintain a healthy work environment for all individuals.

### Renewal: Restoring Trust and Moving Forward

Renewal focuses on healing, growth, and positive change. A well-handled investigation aims to resolve concerns in a constructive way, clarify expectations, and strengthen the community by preventing future issues. Like the renewal of the Easter season, investigations that consistently seek truth through honest processes can lead to new beginnings and healthier relationships.

As we move toward Easter, we are reminded that truth, when approached with compassion and care, leads to healing and new life. Your role in HR investigations is to help ensure that concerns are addressed fairly, responsibly, and in a way that reflects both best practice and our mission as the Church. May this Lenten season continue to guide us in reflection, repentance, and renewal as we serve together seeking the ultimate Truth.

Should you need to conduct an investigation on behalf of your parish or school, please refer to the [Sample Employee Situation Investigation Form](#) as a template. And, as always, reach out to the Office of Parish and School HR for further support as needed at [ParishandSchoolHR@archmil.org](mailto:ParishandSchoolHR@archmil.org) or 414-389-88HR(47).

## REMINDER School Contracts & Nonrenewal Deadlines

School contracts updated for the 2026-2027 school year can be found here: <https://intranet.archmil.org/Resources-2.0/Contract-Forms.htm>

Non-Renewal Deadlines:

- Principal: April 1
- Teacher: April 15

If there is a possibility of non-renewal, teachers should be currently on a Performance Improvement Plan (PIP).

For support, please contact [parishandschoolhr@archmil.org](mailto:parishandschoolhr@archmil.org).

## Form I-9

You may have seen recent messages indicating that the I-9 form has changed. This is a bit outdated, as it refers to the updates from January 2025.

To review, as of January 2025, USCIS released a revised Form I-9 (edition 01/20/25). These updates included:

- minor language and instruction updates (e.g., changing “A noncitizen authorized to work” to “An alien authorized to work,” updating two List B document descriptions, and revising the DHS Privacy Notice)
- aligning E-Verify/E-Verify+ language, effective April 3 2025

Note that the old Form I-9 (edition 08/01/23) is valid until July 31, 2026. However, **we recommend parishes and schools switch to using the revised [Form I-9 \(edition 01/20/25\)](#) now.**

Additionally, if your parish/school is using E-verify (unlikely), be sure to select the appropriate work-authorization category exactly as indicated on their Form I-9.

## Do We Need a Proxy?

Given the challenges of the job market, we see more parishes and schools hiring outside consultants to assist with administrative duties, accounting duties, human resources, marketing, grant writing, and fundraising. It is important that the parish and/or school has proper contracts with these consultants with beginning and ending dates. The contract should not be open ended and the parish or school should have a way to terminate that contract if necessary. Proper insurance by the consultant is also necessary to protect the parish.

Remember that certain administrative matters require unanimous consent of the parish directors which means that all five directors of the parish corporation must give their approval for the action to be valid and legal.

The following are actions requiring the unanimous consent of the directors:

- Borrowing or other forms of taking on indebtedness;
- Selling, mortgaging, leasing, or other encumbering of parish property;
- Making an extraordinary expenditure (not a regular operation expenditure);
- Establishing an endowment fund or foundation;
- Entering into a major building or renovation project or a capital campaign;
- Establishing a line of credit or draw down on an existing line of credit if that draw-down exceeds 50% of the total line. Unanimous approval is also required to open a credit card account with a limit in excess of \$5,000.
- Contracts for independent contractors for (admin, accounting HR, marketing or grant writing duties)

An extraordinary expenditure is considered to be any expenditure of funds ("already in hand") in an amount which exceeds 4% of the previous year's parish ordinary revenue, requires the unanimous approval of the five parish directors. If the 4% figure is below \$1,500, the parish may use \$1,500 as its proxy figure. If on the other hand, the 4% figure is over \$50,000, the parish must use \$50,000 as its proxy ceiling figure.

Most consulting contracts will require proxy approval either because of the dollar amount of the contract or the nature of the work that is to be performed. Please consult the chancery or general counsel to ascertain if a proxy is needed.

Even when a proxy is not required, you can always send your contract to Sharon Hanson ([hansons@archmil.org](mailto:hansons@archmil.org)) for review.

Additionally, it is important to know that contracts for fundraising services must also comply with the USCCB fundraising norms which say that agreements are not to be made which directly or indirectly base payment on a percentage basis.

Finally, **all** contracts need to be reviewed by Catholic Mutual Group to ensure the vendor, when necessary, carries the appropriate insurance coverage for the work they are providing.

## Catholic Mutual Group (CMG) Contacts

Office Phone 262-255-6906 (for all CMG staff)

Office Fax 262-255-7276

[milwaukeeoffice@catholicmutual.org](mailto:milwaukeeoffice@catholicmutual.org)

Kevin Carnell

Claims/Risk Manager

[kcarnell@catholicmutual.org](mailto:kcarnell@catholicmutual.org)

cell 262-622-1953

Suzanne Nickolai

Assistant Claims/Risk Manager

[snickolai@catholicmutual.org](mailto:snickolai@catholicmutual.org)

cell 414-403-2750

Chong Vue

Service Office Assistant/Claims

Processor

[cvue@catholicmutual.org](mailto:cvue@catholicmutual.org)

[www.catholicmutual.org](http://www.catholicmutual.org)

Member Login\*

User: 0065mil

Password: service

\* Note: This is different from the CMG Connect account

## Hiring / Recruiting Support

Is your parish or school hiring and would like help with crafting a job description, posting the role, or screening candidates?

Did you know the Archdiocese of Milwaukee provides support to parishes and schools with recruiting needs? Jackie Luther, Associate Director of Recruiting, is available to help!

Jackie may be reached at: [jluther@archmil.org](mailto:jluther@archmil.org) or 414-769-3470.

## Immigration and Customs Enforcement (ICE) Recommendations for Parishes & Schools

*The following is an excerpt from Archbishop Grob's January 22, 2026 email to pastors, principals and parish leadership. For the full message, please see: [Immigration Enforcement Recommendations.pdf](#) and the Archdiocese of Milwaukee's policy on law enforcement questioning: [AOM Policy 5145.pdf](#)*

January 22, 2026

Dear Pastors, Principals and Parish Leadership,

Thank you for the care and attentiveness you continue to show following my previous message regarding concerns about the possibility of immigration enforcement activity in our community.

At this time, there is no indication that an enforcement action is imminent. However, I encourage our parishes and schools to consider taking proactive measures as we seek to respond with faith, clarity, and compassion, always respecting the law while upholding the dignity of every person.

I am sharing a [link to a document](#) that offers recommendations to support your preparations, along with resources to help guide a practical and pastoral response that is attentive to the needs of the families you serve.

I also ask that all parish and school personnel approach this matter with sensitivity and discretion. It is important that our words and actions remain measured and reassuring, so as not to cause unnecessary fear or anxiety. Should questions or concerns arise, please do not hesitate to reach out so that we may respond together in a thoughtful and coordinated way.

Thank you for your faithful service and for the many ways you walk alongside those entrusted to your care. Let us continue to place our trust in the Lord, asking for wisdom, prudence, and compassion as we seek to be signs of God's presence and love in our communities.

With gratitude and prayers,

Most Reverend Jeffrey S. Grob  
Archbishop of Milwaukee

## Parish & School Resources

### Legal Support:

[Catholic Legal Immigration Network, Inc.](#)

[Catholic Charities Refugee and Immigration Services](#)

Archdiocese of Milwaukee Legal Counsel [Sharon Hanson](#), 414-769-3379

[Forward Latino](#)

### Media Inquiries:

Direct all media inquiries involving an ICE enforcement impacting your parish or school family to Archdiocese of Milwaukee Communication Director [Sandra Peterson](#)

### Pastoral Support

[You are not alone Initiative One-pager-English \(USCCB\)](#)

[You are not alone Initiative One-pager-Spanish \(USCCB\)](#)

### Liturgy and prayer resources:

[Justice for Immigrants – United States Conference of Catholic Bishops](#)

**Printable Cards and Flyers:** [Know Your Rights | Catholic Legal Immigration Network, Inc. \(CLINIC\)](#)

## BAAM Meeting

Wednesday, May 20, 2026

Our Lady of Lourdes Parish  
3722 S. 58<sup>th</sup> St, Milwaukee  
Networking: 8:45am  
Meeting: 9am – 12noon

## Missionary Leadership for Pastors

Equipping you to thrive,  
not just survive

LEADERSHIP  
DEVELOPMENT

*Opportunity*



Pastorate shouldn't be a solo journey. Being a pastor is a sacred calling, but the "business" of the parish—HR, finances, and crises—can feel like a heavy burden to carry alone. The **Missionary Leadership for Pastors** series is moving to better equip you in your parish leadership. This year, we're creating a space where the "how-to" of administration meets the "heart" of ministry.

### Why join us this year?

- **Workshop style discussions:** Dive into real scenarios pastors actually face.
- **The Subject Matter experts:** Have dedicated time with the Chancery and MMCPD experts who can help you solve your headaches.
- **Peer Support:** Learn with and from your fellow pastors who are navigating through the same parish dynamics as you are.

**Learn Together. Lead with Confidence.**

### Workshop Details:

**Location:** Mary Mother of the Church Pastoral Center (MMCPD)

**When:** Second Wednesday of the month, starting **March 11th**

**Time:** 9:30 AM – 3:00 PM (Lunch provided)

*Note: No session in April*

### Who Should Attend?

- **Required:** First-time pastors and parish administrators (per the Archbishop).
- **Optional:** Priests with at least one year of parish work experience.

Don't miss this chance to grow in missionary leadership and strengthen your parish community.

### Session Schedule and Topics:

The program consists of six sessions, each with a separate registration link. Click the date to register.

#### [March 11<sup>th</sup>, 2026:](#)

**Morning Session:** The meaning of "Pastor": Insights from the tradition, the Church's norms, pastoral experience on being the Father of the parish household - *Father Nathan Reesman*

**Afternoon Session:** Introduction to Parish and School Human Resources – *John Barker*

#### [May 13<sup>th</sup>:](#)

**Morning Session:** Faithful Finances: Pastor Training – *Rob Kratoska*

**Afternoon Session:** Chancery – *Barbra Ann Cusack*

#### [June 10<sup>th</sup>:](#)

**Morning Session:** Catholic School Leadership for Pastors, Mastering Decision Making – *Ed Foy*

**Afternoon Session:** SAPRS Sexual Assault Prevention and Response Services – *Sofia Thorn and Cynthia Garcia*

**July 8<sup>th</sup>:** Interculturality: Pastoral Approach to leading multiple cultures – *Father Andrzej Sudol, SCJ*

#### [August 12<sup>th</sup>:](#)

**Morning Session:** Parish communication, crisis communication and supporting strong Catholic Schools – *Sandra Peterson, Chris Schulteis and Kelsey DeMarais*

**Afternoon Session:** Development and Stewardship – *Dan Kowalsky, Cindy Lukowitz and Jenny Mendenhall*

#### [September 9<sup>th</sup>:](#)

**Morning Session:** Office of Evangelization and Catechesis – *OEC Team*

**Afternoon Session:** Faithful Finances: Pastor Training Part II – *Rob Kratoska*

## WORLD MISSION MINISTRIES FINANCIAL GUIDELINES FOR FUND DISTRIBUTION

### **WHO WE ARE:**

World Mission Ministries serves the global Church through two 501(c)(3) nonprofit entities:

#### **Office for World Mission and the Society for the Propagation of the Faith.**

This is most commonly done through the Mission Cooperation Plan (MCP) collections administered by the Society for the Propagation of the Faith, or through support for the Archdiocese of Milwaukee's sister parish, La Sagrada Familia, administered by the Office for World Mission.

*Please note: checks made payable to the Archdiocese of Milwaukee cannot be processed through our office.*

Funds for MCP should be made payable to ***Society for the Propagation of the Faith.***

Funds for La Sagrada Familia should be made payable to ***Office of World Mission.***

### **WHY THIS MATTERS:**

These guidelines help ensure that donor funds are handled with integrity, transparency, and accountability. By adhering to consistent financial practices, World Mission Ministries can comply with legal and accounting requirements, enabling us to continue supporting the Church's global mission while maintaining the highest standards of stewardship and financial oversight.

### **GENERAL GUIDELINES:**

To ensure responsible stewardship, transparency, and compliance with IRS and accounting regulations, the following policies apply:

- Funds may not be distributed directly to individuals.
- All disbursements are issued in U.S. dollars (USD) by check, ACH, or wire transfer.
- Cash disbursements are not permitted.
- Bank processing fees may apply; if not covered by the parish, they will be deducted from the beneficiary through the wire process, if applicable

### **WHERE TO FIND MORE INFORMATION AND FORMS:**

For inquiries regarding international fund disbursement or required forms, please visit our website or contact our office.

Visit our website: [www.worldmissionmke.org/wmmadmin](http://www.worldmissionmke.org/wmmadmin)

Dr. Antoinette Mensah, Ph.D., Director | [mensaha@archmil.org](mailto:mensaha@archmil.org) | (414)758-2282  
Angela Bonnell, Accountant | [bonnella@archmil.org](mailto:bonnella@archmil.org) | (414)758-2281

### **Welcome New Treasury Analyst**

Please welcome Tony Sebranek to the Archdiocese of Milwaukee's Finance Office. As the Treasury Analyst, Tony will assist with the Participants' Indemnity Plan (PIPIT), and the Priests' Pension Plan, among other duties.

Tony has worked for Trek Bicycle, Generac Power Systems, Johnson Diversey and US Bank in treasury, banking, pension, finance systems, and project management roles.

Tony has a BA from the University of Wisconsin-Whitewater, and his MBA from the University of Wisconsin-Oshkosh. He is excited to be supporting the Milwaukee Archdiocese, its parishes, and schools and we are excited to have him on the team.

You can reach Tony Sebranek at [sebranekt@archmil.org](mailto:sebranekt@archmil.org) or 414-769-3326.

### **Missionary Cooperation Plan (MCP) Training – May**

Parish business managers are invited to attend a May training focused on *all things MCP*. This session will walk through the Missionary Cooperation Plan process, key timelines, parish responsibilities, and best practices for a smooth and successful appeal. The training is **especially valuable for those who are new to MCP** but also serves as a helpful refresher for experienced staff.

Join us to gain clarity, confidence, and practical tips for supporting this important mission of the Church.

Register: [Thursday, May 7<sup>th</sup>, 10:00am](#)

## Certificates of Insurance (COIs) Reminders from Catholic Mutual Group (CMG)

Many parishes have a difficult time determining when they have been named as an additional insured on a tenant, contractor or facility user insurance policy. Parishes often obtain a certificate of insurance, which names the parish as a “certificate holder.” It is not adequate to be named as a “certificate holder.”

The insurance certificate furnished to the parish by the tenant, contractor or facility user must indicate in writing that both the parish and the (Arch)Diocese are named as an **additional insured**.

It is very important that the parish be listed as an additional insured rather than as a “certificate holder.” As a “certificate holder,” the parish has no legal rights under a tenant, contractor or facility user’s insurance policy. However, when the parish has been named as an additional insured, the insurance policy of the tenant, contractor or facility user must defend the parish against claims, which resulted from tenant, contractor or facility user operations at the parish. The purpose of being named as an additional insured is to reduce the number of dollars spent on claims not related to parish activities. Therefore, it is essential that parishes verify that both the parish and the Archdiocese have been named as an additional insured.

Since a contractor, tenant, facility user or parish festival vendor will have to make a specific request to their insurance company to get the parish named as an additional insured, it is important to inform them of this requirement well in advance.

Please see page 5 for CMG contact information.

For more information on COIs, please see:

[Catholic Mutual Group \(CMG\) - Certificate of Insurance \(COI\) Requests](#)

[Catholic Mutual Group \(CMG\) - How do I know if my Parish had been named as an "Additional Insured?"](#)

## Participants’ *Indemnity Plan*

We will be collecting information for our workers’ compensation insurance renewal over the next few weeks. You should have received an email during the first week of March that includes a link to a portal to enter compensation and employee count information. Our goal is to have all information collected by Friday, March 20, 2026. Questions? Contact Tony Sebranek at [sebranekt@archmil.org](mailto:sebranekt@archmil.org) or 414-769-3326.

## Safe Environment Week

Safe Environment Week will take place April 19 – April 25, 2026. The Safe Environment Week guideline will be sent to Safe Environment Coordinators. Please make sure to review the materials and begin planning activities for your parish or school.

As a reminder, Safe Environment Compliance Reports will be due July 1, 2026. The reporting template will be distributed to coordinators later this spring. These reports are particularly important this year as the Archdiocese of Milwaukee will undergo an in-person audit by the United States Conference of Catholic Bishops (USCCB) in July as part of the Charter for the Protection of Children and Young People. Some sites will be visited by the Auditors.

## Archdiocese of Milwaukee Participant's Indemnity Plan 2026 Vehicle Audit

Periodically, Catholic Mutual Group (CMG) completes an automobile audit of our members to ensure that we have accurate records of owned and leased vehicles, and an up-to-date list of authorized drivers. The last audit was completed in 2024. This vehicle information is also important for billing purposes.

CMG will need a response from each parish this year again.

Linked [here](#) is the Participant's Indemnity Plan 2026 vehicle audit form. We ask for your assistance in completing and returning the form to CMG's office at your earliest convenience, but no later than **April 1, 2026**. The form can be returned via e-mail, fax or by regular mail. To return via e-mail, the completed form should be saved to your hard drive before attaching. The saved document should be emailed to [snickolai@catholicmutual.org](mailto:snickolai@catholicmutual.org).

The audit form does need to be returned to CMG even if your parish/school does not have any vehicles owned or leased by the parish/school and does not have any drivers. A response is needed from all parishes and schools that participate in PIPIT.

If the number of owned / leased vehicles or the list of drivers who regularly use these vehicles does not fit in the space allowed, please attach an additional page. Please enter information clearly and legibly to enhance readability and reduce errors on vehicle identification numbers and driver license numbers.

As always, if you have questions regarding this audit form, or the [Participant's Indemnity Plan's transportation policy](#), do not hesitate to contact CMG.

Thank you,  
Suzanne

Suzanne Nickolai | Assistant Claims/Risk Manager  
Catholic Mutual Group | P.O. Box 178, Menomonee Falls, WI 53052  
W | (262) 255-6906  
C | (414) 403-2750  
F | (262) 255-7276  
[Snickolai@catholicmutual.org](mailto:Snickolai@catholicmutual.org)

## Property Tax Exemption Reports (PC220 & PC-220A)

As a reminder, the Tax Exemption Report for 2026 forms PC-220 and/or PC-220A are due to your municipality by **March 31, 2026**.

You may complete the forms (or print blank forms) online by using the links below. Completed forms must be printed and mailed to your taxation district. These forms are NOT filed on-line.

Form PC-220:

<https://www.revenue.wi.gov/DORForms/pc-220f.pdf>

Form PC-220A:

<https://www.revenue.wi.gov/DORForms/pc-220af.pdf>

Additional instructions for completing these forms are found [at this link](#).

Please send a copy of your completed form to the Archdiocesan Office of Financial Services via email ([wrights@archmil.org](mailto:wrights@archmil.org)) or mail (PO Box 070912, Milwaukee, WI 53207-0912).

A copy of the presentation from the live training webinar may be viewed from the Online Training page under "Property Tax Exemption:" <https://intranet.archmil.org/offices/parish-school-financial-consulting/training.htm>

## Scrip Accounting

Appendix 3-C of the Parish Finance Management Manual (PFMM) covers Parish Asset Code Definitions. The following is an update regarding accounting for Scrip at parishes and schools.

First In First Out (FIFO) Inventory System: a valuation method in which assumes older inventory is used before newer inventory is used. The first goods to be sold are assumed to be the first goods purchased. The FIFO method maintains the newest items in inventory.

The example below demonstrates how to handle a situation in which the parish purchases scrip cards at two prices.

On July 3<sup>rd</sup> St. Adelina purchased 50 cards at \$94 per card. Fifty cards x \$94 = \$4,700.

	Account #	Account Name	Amount Dr	Amount Cr
<b>Entry for Parish collection of Mass Stipends throughout the month</b>				
Dr.	1390	Other Supply Inventory	\$4,700	
	Cr.	1010	General Checking	\$4,700

On July 10<sup>th</sup> St. Adelina purchased an additional 50 cards at \$98 per card. Fifty cards x \$98 = \$4,900.

	Account #	Account Name	Amount Dr	Amount Cr
<b>Entry for Parish collection of Mass Stipends throughout the month</b>				
Dr.	1390	Other Supply Inventory	\$4,900	
	Cr.	1010	General Checking	\$4,900

During the month of July, 60 cards were sold. Following the FIFO Inventory system, reduce the inventory amount by the amount of the cards purchased first (\$94) and once these run out, move to the cards purchased second (\$98). Fifty cards x \$94 = \$4,700.

Ten cards x \$98 = \$980.

Total: \$980 + \$4,700 = \$5,680. Each scrip card was sold for \$100.

For inventory tracking in Excel:

Vendor	Cost Value	# Cards in Inventory at Beginning of Month	# of Cards in Inventory at End of Month
Company Name	\$94	50	0
Company Name	\$98	50	40

<b>At the end of July, St. Adelina would then record revenue income:</b>				
Dr.	1010	General Checking	\$6,000	
	Cr.	1390	Other Supply Inventory	\$5,680
	Cr.	3495	Other Revenues	\$320

The FIFO Inventory system will reduce inventory by the amount of the oldest cards regardless of the physical card sold.

Note: Inventory needs to be tracked by card type. For example, by vendor and dollar value. For example, inventory for Kwik Trip \$100 cards and inventory for Kwik Trip \$50 cards should be tracked separately. The parish may need to set up an Excel spreadsheet to track inventory. The *Parish Financial Management Manual (PFMM)*, Section 1300 Inventories indicates that scrip inventory should be maintained at cost.

## Contacts

Parish & Schools Financial Consulting:  
[parishfinance@archmil.org](mailto:parishfinance@archmil.org)

Rob Kratoska, CPA, CMA, Director of Finance  
Parish & School Financial Consulting  
[kratoskar@archmil.org](mailto:kratoskar@archmil.org)  
414-769-3377

Michael Waddell, Parish Finance Consultant  
Parish & School Financial Consulting  
[waddellm@archmil.org](mailto:waddellm@archmil.org)  
414-769-3335

Dawn Thiele, Parish Finance Consultant  
Parish & School Financial Consulting  
[thieled@archmil.org](mailto:thieled@archmil.org)  
414-769-3336

Tony Sebranek, Treasury Analyst  
Office for Finance & Administration (PIPIT)  
[sebranekt@archmil.org](mailto:sebranekt@archmil.org)  
414-769-3326

Chris Brown, Treasurer and CFO  
Office for Finance & Administration  
[brownc@archmil.org](mailto:brownc@archmil.org)  
414-769-3325

Janice O'Connor, Lay Pension Coordinator  
[occonnorj@archmil.org](mailto:occonnorj@archmil.org)  
414-769-3317

Donna Steffan, Priest Pension Billing  
[steffand@archmil.org](mailto:steffand@archmil.org)  
414-769-3318

Sharon Hanson, General Counsel  
[hansons@archmil.org](mailto:hansons@archmil.org)  
414-769-3379

Maureen Wurster, HR and Benefits Administrator  
[wursterm@archmil.org](mailto:wursterm@archmil.org)  
414-769-3423

For new HR inquiries, please contact:  
[ParishandSchoolHR@archmil.org](mailto:ParishandSchoolHR@archmil.org) or 414-389-88HR(47)

John Barker, Director of Parish and School Human Resources  
[barkerj@archmil.org](mailto:barkerj@archmil.org)  
414-769-3370

Rachel Uchytel, HR Coordinator/Generalist  
[uchytilr@archmil.org](mailto:uchytilr@archmil.org)  
414-769-3380

Jennifer Pollock, SHRM-CP, Director of Human Resources  
[PollockJ@archmil.org](mailto:PollockJ@archmil.org)  
414-769-3356

Jackie Luther, Associate Director of Recruiting  
[jluther@archmil.org](mailto:jluther@archmil.org)  
414-769-3470

Sofia Thorn, MSW, LCSW, Victim Assistance Coordinator  
Office of Sexual Abuse Prevention and Response Services  
[thorns@archmil.org](mailto:thorns@archmil.org)  
414-769-3332  
Victim Reporting Line: 414-758-2232

Cynthia Garcia, Director of Safe Environment  
[garciaac@archmil.org](mailto:garciaac@archmil.org)  
414-769-3447

Dan Kowalsky, Director of Development  
[kowalskyd@archmil.org](mailto:kowalskyd@archmil.org)  
414-769-3329

Finn Nolan, Associate Director of Pledge Fulfillment  
Love One Another (LOA)  
[nolanf@archmil.org](mailto:nolanf@archmil.org)  
414-769-3469

Cindy Lukowitz, Director of Stewardship  
[lukowitz@archmil.org](mailto:lukowitz@archmil.org)  
414-739-3572

### Checks from the Archdiocese of Milwaukee

If your parish receives a check from the Archdiocese of Milwaukee and you have questions about it, please contact our Accounts Payable team at: [accountspayable@archmil.org](mailto:accountspayable@archmil.org).

### Updated Check Issuing Guidelines

The Check Issuing Guidelines has been updated. Some mailing addresses have changed. Please be sure to download the latest version!

For more information, please see:

<https://intranet.archmil.org/ArchMil/Resources/ParFin/CheckIssuingGuidelines20260127.pdf>