



Parish Financial and Management Services

"Where your treasure is, there your heart will be also." - Matthew 6:21

These ministries include the Pastoral and Financial Councils, and 2 Trustees who assist the Pastor, Parish Director or the Administrator of the Parish. These members are legally and ethically responsible to safeguard all of the assets, gifts and offerings of the parish.

- ☐ Our Parish has an active **Pastoral Council** that meets at least 4 times a year.
- ☐ Our parish has an active mission statement.
- ☐ Our parish has opportunities for parish members to offer input to the Council.
- ☐ We have committees to address areas of parish life, including committees for Worship, Education, Living Justice, Stewardship, and Evangelization.
- ☐ We follow the protocols from the Parish Pastoral Council Policies.
- ☐ Our Parish has an active **Finance Council** that meets at least 4 times a year. At each meeting, financial reports are reviewed.
- ☐ Our Finance Council prepares an annual budget for the current year and for the next fiscal year.
- ☐ Our Finance Council has prepared a 3-5 year budget plan and updates it annually.
- ☐ Our Finance Council compares actual financial information with budgets and reviews variances.
- ☐ Our Finance Council, using diocesan guidelines, ensures that financial procedures for internal controls are in place regarding accounting records and protection of parish assets.
- ☐ Our Finance Council works in close collaboration with the parish stewardship committee in making recommendations for the generation of revenue in support of the overall mission of the parish.
- ☐ Our Finance Council oversees and coordinates fundraising within the parish including fundraising by parish service organizations and educational entities.
- ☐ Our parish provides an annual financial report to parishioners with an income statement and balance sheet.
- ☐ Our parish has an annual meeting that reflects the growth and activities of the parish.
- ☐ We follow the protocols from the Parish Finance Council Policies.
- ☐ Our Treasurer Trustee attends Finance Council meetings and receives the Pastoral Council minutes.
- ☐ Our Treasurer Trustee assists the Pastor/Administrator/Pastoral Leader to oversee the coordination of parish records.
- ☐ Our Treasurer Trustee presents a written report to the parish membership at the Annual Meeting.
- ☐ Our Secretary Trustee assists with the development of parish policies and strategies to address the needs and the mission of the parish.
- ☐ Our Secretary Trustee attends Pastoral Council meetings and receives the Finance Council minutes.

List any existing barriers to following the policies and additional comments:



Religious Education/Catechesis and Youth Ministry

“Christ himself gave the apostles, the prophets, the evangelists, the pastors and teachers to equip his people for works of service, so that the body of Christ may be built up until we all reach unity in the faith and in the knowledge of the Son of God and become mature, attaining to the whole measure of the fullness of Christ.”
 - Ephesians 4: 11-14

These ministries invite, welcome, and support families, catechists, coordinators, directors, and youth ministers in the realm of religious education/catechesis and youth ministry fostering households and communities of disciples.

Check each statement that is true for your parish or school:

- ☐ Staff and Committees plan together for Catechesis and Youth Ministry that welcomes and invites people into community.
- ☐ Resources are used to reach out, engage, and impact the Community in which you dwell.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation through welcome, hospitality, and relationships.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not “just a job,” but a way to find purpose, meaning, and mission.
- ☐ Leaders and Volunteers receive formal initial training and on-going formation and support.
- ☐ Leaders ask parishioners to praying for students and families in the parish.
- ☐ Leaders accompany parents by empowering them to be witnesses and teachers of the faith to their children, family, workplace, and community.
- ☐ Leaders offer parents continuing formation as an integral part of sacramental preparation of children and family.
- ☐ Leaders offer experiences for children and their families to encounter Jesus and accompanies them into a deeper understanding of faith.
- ☐ Staff uses Catholic resources that are useful, orthodox, and in line with the mission and vision of the diocese and Bishop.
- ☐ Religious education, youth ministry and school are complementary, sharing the same goals and working together regularly.
- ☐ Leaders offer students, and their families, opportunities to remain engaged in the parish beyond the preparation sacramental years of first reconciliation, communion, and confirmation.
- ☐ Youth ministry and religious education programs intentionally seek to welcome, reach, and attract non-practicing Catholics.
- ☐ Leaders intentionally seek to integrate families into the life of the parish and promote joyful giving to supporting parish(s).

List any barriers to offering ministries in these areas:



Cemetery

“Those who walk uprightly enter into peace; they find rest as they lie in death. “ - Isaiah 57:2

This ministry reflects and honors the Church’s tradition by providing a sacred place of rest for the faithful departed and a quiet place for prayer and devotion.

Cemeteries should refer to the Parish Cemetery Module as set by the Diocese of Green Bay.
(<http://www.gbdioc.org/facilities-and-properties/cemeteries.html>)

Check each statement that is true for your parish or diocesan cemetery:

- ☐ The parish has a cemetery committee which has no more than five persons.
- ☐ The pastor/administrator/pastoral leader or his/her designee is a member of the committee.
- ☐ The committee meets at least annually and reports regularly to the Finance Council.
- ☐ The committee includes a chairperson, a treasurer, a secretary, and members.
- ☐ The parish requires burial vaults for all burials in your cemetery.
- ☐ The cemetery requires urns containing cremated remains buried in the ground to be of durable materials as noted in the Cemetery Module.
- ☐ The cemetery is able to do burials in all seasons.
- ☐ The cemetery retains accounting records and burial documents in the parish office, with backup copies (contracts, financials, burial records, etc.) stored in a secure fire-proof safe or vault.
- ☐ The cemetery retains Final Disposition of all casket burials from the funeral home and files in parish office or diocesan cemetery vault.
- ☐ Perpetual care funds (25% or more of the revenue from any sale of burial space or at least \$25) are invested in accordance with current diocesan investment policies.
- ☐ Our goal is to have \$20,000 in perpetual care for each acre of land.
- ☐ We follow state cemetery statutes by filing an annual report with the cemetery board regarding trust funds which includes statutorily specified information (while retaining a paper copy).
- ☐ Our cemetery follows Canon Law of the Roman Catholic Church.
- ☐ Our Cemetery follows the Wisconsin State Statute 157.62 on reporting, record keeping, and audits which outlines the detailed records required for each deceased person buried in a cemetery he records we collect include: name and last-known address of the deceased.
- ☐ Our parish cemetery committee has set of written rules and regulations for each cemetery that is under their supervision.
- ☐ We follow the rules and regulations on page 7 of the Parish Cemetery Module (<http://www.gbdioc.org/facilities-and-properties/cemeteries.html>) and makes them available to all who own burial rights and other interested parties.
- ☐ The cemetery committee has a 5 year deferred maintenance plan for grounds, buildings, and equipment maintenance.
- ☐ The cemetery committee does routine safety assessments of grounds and addresses accordingly.

List any barriers to offerings in this area of ministry:



Parish Communications

"Let us consider how to stir up one another to love and good works." - Hebrews 10:24

This ministry provides customer service across a variety of media in response to the changing communication needs of parishes and schools.

Check each statement that is true for your parish:

- ☐ Staff and Committees plan for communications in all areas of ministry as a way to welcome, invite, minister and serve.
- ☐ Resources are used to impact the Community in which you dwell, providing a warm welcome and invitation to belong.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is "not just a job," but a vital way to reach the community with hospitality, welcome, and invitation.
- ☐ Our parish and school would like to become more successful welcoming people in our communication efforts.
- ☐ We use professionally or experienced people for initial and on-going technology and communications implementation in areas such as computer and email networks, phone systems, websites, social media, media relations, marketing/advertising, and Graphic Standards (logo usage).
- ☐ Our current I.T. / technology infrastructure and support network are up to date.
- ☐ Our IT resources include:
 - ☐ ParishSoft ☐ PowerSchool ☐ Great Plains (accounting) ☐ Citrix
 - ☐ Network Infrastructure ☐ Other
- ☐ All staff and ministry leaders are trained to utilize all means of communications.
- ☐ We have a plan to improve our current communications methodology.
- ☐ We focus on a variety of specific audiences to reach through communications.
- ☐ We have asked parishioners and parents how they prefer to receive communications.
- ☐ We currently use a variety of means to communicate all of our ministries:
 - ☐ Bulletin ☐ Website ☐ Newsletters ☐ Mailings
 - ☐ Email ☐ Newspaper ☐ FaceBook ☐ Twitter ☐ Posters

List any barriers to offering these areas of this ministry:



Education (Catholic Schools)

"Train up a child in the way he should go; even when he is old he will not depart from it."
- Proverbs 22:6

This ministry supports families, staff, teachers, and administrators in collaboration to educate the whole child by providing an excellent education rooted in Gospel Values, fostering households, and communities of disciples.

Check each statement that is true for your school:

- ☐ Staff and Committees plan for excellence in Catholic Identity, Governance, Leadership, and Operations.
- ☐ Resources are used to impact the Community in which you dwell, providing a warm and inviting welcome.
- ☐ Faculty, Staff, and Administrator understand their work as evangelizing and reaching out with the message of salvation.
- ☐ Faculty, Staff, Administrator, and volunteers are formed to understand Missionary Discipleship, understanding this is not "just a job."
- ☐ Offer continuous training, support, and formation for the administrator, teachers, staff, board/council, and volunteers to promote retention.
- ☐ Asks parishioners to pray for school children and families in the parish.
- ☐ Accompany parents in their faith lives to empower them to be witnesses and catechists to their children.
- ☐ Offer formation and experiences for children and their families to encounter Jesus.
- ☐ Use Catholic resources that are useful, orthodox, and in line with the mission and vision of the diocese and Bishop.
- ☐ School, religious education, and youth ministry are complementary and share same goals.
- ☐ The school staff encourages and accompanies students into a deeper understanding of faith.
- ☐ The School intentionally seeks to reach, attract, and integrate families into the life of the parish and promotes joyful giving to supporting parish(s).
- ☐ The School has a written improvement plan, an up to date strategic and mission plan.
- ☐ The School encourages a sense of community through co-curriculars.
- ☐ The School leadership board/council has active working committees engaged with the parish leadership.
- ☐ The School has a written enrollment management plan based on data.

List any barriers to offering ministries in these areas:



Evangelization

“Go into all the world and proclaim the gospel to the whole creation...” – Mark 16:15

This ministry is responsible for developing, implementing, and sponsoring initiatives that lead people to an encounter and discovery of Jesus; accompany people on their journey of faith; to follow Jesus; to build lives of intentional discipleship; to send disciples out into the world to share Jesus with others.

Check each statement that is true for your parish and school:

- ☐ Staff and Committees understand and plan for Evangelization.
- ☐ Resources are used to impact the Community in which you dwell.
- ☐ Prepare a welcoming environment in all ministries.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not “just a good thing to do.”
- ☐ Have established goals and objectives for evangelization in the light of Church documents on evangelization and diocesan goals and objectives.
- ☐ Have a plan and process of evangelization for those in parish and school leadership, key volunteer positions, and parishioners.
- ☐ Offer, promote, and develop intentional discipleship formation processes sustained by a lasting encounter with Christ.
- ☐ Offer on-going Adult Faith Formation opportunities.
- ☐ Offer outreach to college-aged students and young adults (18-39).
- ☐ Seek to find new and innovative ways to welcome and invite those whom we interact with, especially the poor, the outcast, the stranger, and the lonely.
- ☐ Re-propose faith in Jesus and re-establish trust in His Church by inviting those who have fallen away with a personal invitation to return.
- ☐ Have developed ecumenical partnerships with other Christian communities.
- ☐ At least annually, offer creative, and welcoming opportunities for youth and young adults to learn about vocations as a Priest, Deacon, Religious and/or Lay Ecclesial Minister.
- ☐ We are familiar with the Emmaus and Discipulos de Cristo and Apóloles de Cristo Diocesan Formation programs for Lay Ecclesial Ministers.
- ☐ We sponsor professional development and membership in organizations for our:
 - ☐ Priests ☐ Deacons ☐ Religious ☐ Lay Ecclesial Ministers

List any barriers to offering ministries in these areas:



Facilities & Properties Planning

*"God is able to bless you abundantly, so that in all things at all times,
having all that you need, you will abound in every good work." - 2 Corinthians 9:8*

This ministry is entrusted with the stewardship of temporal goods (owned and leased) so that divine worship and other ministries may be more efficiently and safely carried out.

Please check each statement that is true for your parish and school:

- ☐ Ministers understand their work as evangelizing, as a means of reaching out through the creation and maintenance of sacred spaces.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not "just a job."
- ☐ Resources are used to impact the Community in which you dwell, providing a warm and inviting welcome.
- ☐ Resources are offered generously and graciously as they set the stage for encounters with Christ.
- ☐ Proxy Guidelines are utilized when proxy approval is required from Bishop, and the contract is sent to the Diocese for review. (found at: <http://www.gbdioc.org/facilities-and-properties/proxy-materials.html>).
- ☐ We have a 5 year strategic facility plan (SFP) encompassing owned, (occupied or vacant) and leased property that sets strategic facility goals based on the organization's mission and vision.
- ☐ We have completed an in-depth analysis of our existing facilities and have an achievable and affordable plan to meet parish/school needs.
- ☐ We have a 5 year deferred maintenance plan addressing current situations and analyzed future needs.
- ☐ We identify and plan for Special and Hazardous Materials and make Safety Data Sheets accessible for personnel.
- ☐ Facility technical records (maps, plans, drawings, utility locations) are securely stored and available in case of emergency.
- ☐ Operations and Maintenance Manuals are available to staff with manufacturer's instructions/specifications for operation/maintenance of equipment, building materials, structures, and other items.
- ☐ We have committees/procedures in place to ensure Safety/Security or there is an awareness if/when needed (find these procedures at <http://www.gbdioc.org/facilities-and-properties.html>).
- ☐ Risk Control memos as found at <http://www.gbdioc.org/facilities-and-properties/risk-control-memos.html> memos are used with welcoming & pastoral language.
- ☐ We utilize guidelines/videos when preparing for special events or inclement weather, such as festivals, picnics, or slips, trips, and falls.
- ☐ Maintenance checklists are utilized for monthly safety of school/facility, playground safety, and playground equipment safety inspection.
- ☐ We adhere to required site, school voucher, and boiler inspections timeline.

List any barriers to having any of these committees/procedures/guidelines in place:



Human Resources

“Do not withhold good from those to whom it is due, when it is in your power to act.” - Proverbs 3:27

This Ministry provides professional protocols and expectations for all parish and school employees to ensure legal and ethical considerations are exercised.

Check each statement that is true for your parish:

- ☐ Staff and Committees plan for staffing needs.
- ☐ Resources are used to impact the Community in which you dwell, emphasizing the necessity of providing a warm and inviting welcome to all.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation to everyone they encounter.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not “just a job.”
- ☐ Policies and procedures are in place and followed for all parish and school employees throughout the Employment Cycle; such as Recruiting, Hiring, Terminations, Job descriptions, Compensation, Personal Conduct, Benefits, Background Checks.
- ☐ Supervisors and Managers maintain confidentiality of applicant, candidate, and employee personal information.
- ☐ Parish/school maintains confidential staff files and follows guidelines for record keeping.
- ☐ Employees treat each other with dignity, respect and appreciation.
- ☐ Employees lead by example; with integrity, respect for others, humility, and trustworthiness.
- ☐ Supervisor and Managers “Seek First to Understand” by listening first, listening well, and communicating after information has been received.
- ☐ Job descriptions, compensation, benefits, performance, contracts are reviewed and updated regularly.
- ☐ Employees refrain from behavior that could be construed as harassment, hostile work environment, or otherwise discriminatory.
- ☐ Staff ensures workplace is not hazardous to employee safety by discussing safety topics at staff meetings (i.e. slips, trips, and falls; parking lot safety in snowy/icy conditions, etc.).
- ☐ Supervisors and Managers conduct exit interviews for employees who resign or retire.

List any barriers to utilizing the methods within this area of ministry:

DISCIPLES ON THE WAY | PARISH MISSION PLANNING: CHECKLIST



Living Justice Advocacy

"Learn to do good; seek justice, correct oppression..." - Isaiah 1:17

This area of ministry focuses on identifying and addressing root causes of injustice related to Themes of Catholic Social Teaching.

Check each statement that is true for your parish:

- ☐ Staff and committees learn, immerse, and plan for Social Justice efforts.
- ☐ Resources are used to impact the Community in which you dwell, inviting all people into awareness of societal injustices and serving those in need.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation through action, word, and prayer.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not "just a good thing to do" and that social justice and service are foundational.
- ☐ Social Justice issues are often addressed in the weekend homily.
- ☐ Social Justice efforts and events are regularly addressed in the bulletin and social media.
- ☐ Social Justice issues are regularly addressed through catechesis with children, youth, adults, and families.
- ☐ Your parish offers catechesis and efforts to minister in such areas of justice as:
 - ☐ life issues: abortion, euthanasia, and capital punishment
 - ☐ social Issues: racism, homosexuality, and war/violence environment
 - ☐ economic issues: poverty, homelessness, and hunger
 - ☐ political Issues: taxes, religious liberty, and immigration
- ☐ My parish has a committee for addressing Social Justice Concerns.
- ☐ There are at least 3-5 people on the Social Justice Concerns committee.
- ☐ The Social Justice Concerns committee chooses a Chairperson.
- ☐ The Social Justice Concerns committee requires term limits for committee members.
- ☐ The Social Justice Concerns committee meets at least 4 times a year.
- ☐ The Social Justice Concerns committee regularly recruit new members.
- ☐ A portion of the parish budget is devoted to Social Justice efforts.
- ☐ The Social Justice Concerns committee includes non-parishioners.

List any barriers to offerings in these areas of ministry:



Marriage, Family Life, and Pro-Life

For this reason I bow my knees before the Father, from whom every family in heaven and on earth is named... that you may be filled to the measure of all the fullness of God. - Ephesians 3:14-18

These ministries foster activities and projects consistent with Catholic teaching and assist Catholics in supporting the domestic church and building households of discipleship.

Check each statement that is true for your parish:

- ☐ Staff and Committees plan for ministries relating to strengthening families.
- ☐ Resources are used to impact the Community in which you dwell, providing a warm and inviting welcome.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not “just a good thing to do.”
- ☐ Offer formation for young people prior to marriage to develop good relationship foundations firmly grounded in the practices of our faith.
- ☐ Couples who come for marriage are welcomed, supported, and evangelized during the process of engagement.
- ☐ Newlyweds and couples who are currently married in your community are continually supported and celebrated in their vocation.
- ☐ Resources and help are available for couples who are struggling with their marriage.
- ☐ Natural Family Planning is promoted and available in your parish.
- ☐ Parents are made aware from all ministries that they are the primary educators and disciple formers of their children.
- ☐ Parents are equipped for formation of their children and included as an integral part of their religious education and spiritual growth.
- ☐ Families are supported, celebrated, and integrated into parish and school life.
- ☐ Resources are available for families that are in crisis or with unusual circumstances.
- ☐ All types of families at all stages are welcomed and celebrated.

List any barriers to offering ministries in these areas:



Pastoral Care Ministries

"I was hungry...I was thirsty...I was a stranger...I was naked...I was sick...I was in prison ... whatever you did for one of the least of my people, you did for me." - Matthew 25:36-40

These ministries evangelize by providing direct accompaniment service resources to persons who are vulnerable, sick, disabled, suffering difficulties, and/or are lonely.

Check all statements that are true for your parish:

- ☐ Staff and committees plan and pray for all pastoral care offerings.
- ☐ A pastoral care team works together to meet the needs of the parish and community.
- ☐ Resources are used to impact the community in which you dwell, providing a warm inviting welcome and invitation to connect and belong.
- ☐ Ministers understand their work as evangelizing, as a means of reaching out with the message of salvation to the vulnerable and hurting persons with authentic welcome and hospitality.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not "just a good thing to do," but is a way of life.
- ☐ Initial and continuing Pastoral Care Training is provided for all Pastoral staff and pastoral care volunteers.
- ☐ Presentations on pastoral care topics are regularly offered for the parish, school, and community, and is modeled by ministry leaders and pastor.
- ☐ Pastoral Care Ministry is offered across a broad spectrum such as: hospital visits, death and dying, grief, care ministry/home visitation, health and wellness/parish nursing, Holy Communion to the sick/homebound, divorced/ widowed, jail/prison ministry and caregiver outreach.
- ☐ Pastoral Care Ministry offers an awareness of working with Persons with Disabilities and the Deaf/Hard of Hearing Community.
- ☐ Pastoral Care Ministry hosts support groups, such as: Grief Network, AA (Alcoholics Anonymous), NA (Narcotics Anonymous), Al-Anon/Ala-Teen, NAMI (National Alliance on Mental Health or Veterans).
- ☐ Pastoral Care Ministry gathers or has a network of prayer ministries and prayer volunteers.
- ☐ Ministers are aware of the agency of Catholic Charities of the Diocese of Green Bay, and refer hurting persons to utilize their services and ministries, especially where life issues are beyond the scope of the volunteer Care Minister.

List any barriers to providing these areas of ministry:



Worship

"Therefore, since we are receiving a kingdom that cannot be shaken, let us be thankful, and so worship God acceptably with reverence and awe..." - Hebrews 12:28

This ministry is responsible for supporting the liturgical and sacramental life of parishes. Ministers fulfill a vital role of our worship within our Christian identity by developing and encouraging full, active, and conscious participation in liturgy and our rich tradition of prayer.

Check each statement that is true for your parish:

- ☐ Staff and Committees plan for all Worship.
- ☐ Resources, training, and mentoring are used to impact the Community in which you dwell, providing a warm and inviting welcome.
- ☐ Ministers understand their work as evangelizing; as a means of reaching out with the message of salvation through hospitality and welcoming.
- ☐ Ministers are formed to understand Missionary Discipleship, understanding this is not "just a job or a good thing to do."
- ☐ Have established procedures for planning in light of Church documents on liturgy and Diocesan Guidelines for Liturgical Ministers.
- ☐ Offer formal initial and on-going training and formation opportunities.
- ☐ Offer training, mentoring, and support for genuine, welcoming hospitality and outreach to all gathered for worship.
- ☐ Have expectations that everyone is responsible for welcoming and hospitality.
- ☐ Worship spaces are neat and in good repair, and express beauty that is both tasteful and noble.
- ☐ Leaders recruit new ministers, including college-aged students and young adults.
- ☐ Leaders seek to find new and innovative ways to express God's Love through liturgy.
- ☐ Music encompasses a variety of styles, including varied cultural offerings as appropriate.
- ☐ The Liturgical Seasons are planned by a team with representation from all ministries.
- ☐ A variety of public prayer forms are regularly offered.
- ☐ Visitors find it easy to participate.
- ☐ Non-Catholic visitors find it easy to participate and are warmly welcomed.
- ☐ Special accommodations are made to remove barriers for Persons with Disabilities:
 - ☐ Mobility ☐ Sight ☐ Hearing ☐ Cognitive ☐ Other: _____

List any barriers to offering ministries in these areas:
