

OutReach

Vol. 13, No. 1 2022

A Christian Brothers Services Publication

Feature Stories

Farewell and thank you
to our CBS retirees
- inside front cover

Member Focus
Diocese of Charleston
- page 4



After 14 years as President/CEO, Brother Michael Quirk, FSC, Ed.D. will retire in August.

Christian Brothers Services names Patrick C. Lynch, CFA, President/CEO



Patrick C. Lynch, CFA

Patrick C. Lynch, CFA, joined Christian Brothers Services July 5, 2022 as the fourth President/CEO in the company's 62-year history, and the first layperson in the role for CBS. As Brother Michael Quirk will be retiring August 31, an extensive nationwide search and interview process was conducted by the CBS Board of Directors.

"After a thorough search and interview process, the Board is confident it has found the right person to lead Christian Brothers Services," said CBS Board Chairman Brother Joseph Saurbier, FSC. "Patrick Lynch brings a wealth of experience to the position and is widely recognized as a leader in the banking and financial services industries. He has outstanding knowledge of what it takes to run a successful business in an ethical, people-first manner, as he values fostering long-lasting relationships with his clients and staff.

"As the first layperson President/CEO in CBS history, Patrick brings a deep respect for, and commitment to, our Lasallian heritage and company mission. His extensive leadership work on Boards for Catholic educational institutions and charities speaks volumes. We believe he will provide CBS with sound, innovative leadership from day one. I am happy to have Patrick join us and I look forward to working with him as does the entire Board," Brother Joseph concluded.

With three decades in the financial services and banking industries, Lynch brings an impressive professional background to the position, including serving 21 years as Founder, President, & CEO of Chicago Equity Partners. That company, formerly

a division of Bank of America, became a fully independent boutique investment advisory firm in 2000. Lynch led the firm's executive team, which included the CFO, Chief Investment Officers, General Counsel/CCO, and the heads of technology, sales, marketing, and client services, as well as a staff of 40. Before taking on that role, for 10 years Lynch was a Senior Vice President with Bank of America.

Lynch serves on several Boards with ties to Catholic education and philanthropy. His firm, Chicago Equity Partners, included Catholic organizations and institutions as clients, including many that are also members of the various trust/plans that are administered by CBS.

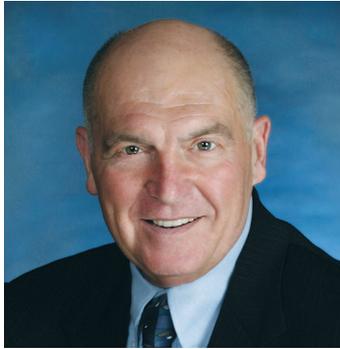
At Loyola University Chicago, his alma mater, Lynch was Finance Committee Chair, where he helped to shape strategy for hundreds of millions of dollars in annual revenue. He also works on the university's Executive, Audit, and Compensation Committees, and served as a Trustee. He served as the Vice Chair on the university's Council of Regents, and is also a member of Loyola's Baumhart Center for Social Enterprise & Responsibility's Leadership Council, which guides the Center's efforts to foster just, humane, sustainable social business practices. Lynch also served as the Chairman of the Board of Trustees and as a Trustee at St. Ignatius College Preparatory School in Chicago; Chairman of the Board of Directors and Board member for the Catholic Education Foundation, and as a Board member at Catholic Charities, both for the Diocese of Joliet. ☀

Lasallian Leadership

Steeped in the Lasallian tradition since its inception, Christian Brothers Services holds a long history of Lasallian leaders at its helm. The foresight to maintain CBS' mission to understand, guide and protect its members transcends these individuals and exemplifies the strong spirit of community that *defines* CBS.



Brother Joel Damian, FSC



Brother William L. Walz, FSC



Brother Michael Quirk, FSC

Brother Joel Damian, FSC

Founder/President 1960-1985

Brother Joel Damian (Charles Wilhelm) was born in Minneapolis, Minnesota on August 29, 1918. He attended De La Salle High School in his home town, and it was from there that he entered the Juniorate on February 3, 1933 in Glencoe, Missouri at the age of 15. Three years later, he entered the Novitiate on August 30, 1936, where he received the habit and the religious name of Brother Joel Damian. He completed his undergraduate degree at St. Mary's College in Winona, Minnesota in 1940, and was assigned to teach at St. Patrick High School in Chicago.

In 1967, Brother Damian helped establish the Christian Brothers National Office on the campus of Lewis University and built the novitiate and scholasticate on the campus. He was named executive secretary of Christian Brothers Conference and established employee benefit programs for the lay associates/colleagues of the Christian Brothers. He also helped initiate and establish trusts to cover property and casualty programs, religious health trusts and all the programs/plans currently administered by Christian Brothers Services. Brother Damian was also instrumental in creating Christian Brothers Investment Services.

Brother William L. Walz, FSC

President/CEO 1985-2008

William L. Walz entered the novitiate of the Brothers in 1966 in Glencoe, Missouri, and professed his final vows in 1977. He earned a bachelor's degree from St. Ambrose College in Davenport, Iowa, a master's degree from Michigan State University, and an MBA from Lewis University in Romeoville.

During the 22 years Walz served as President/CEO, the organization grew from approximately 60 staff members to almost 200. CB Programs, CBS Canada and CB Travel were all added to the expanding list of services offered by Christian Brothers Services. He was particularly proud of the management team he put together and the design and construction of the current building in Romeoville.

His mantra was Acquire with Product, Retain with Service, Create Apostles with Results.

Brother Michael Quirk, FSC, Ed.D.

President/CEO 2008-2022

Brother Michael Quirk, FSC, completed his novitiate in 1983 at the La Salle Institute of the University of Windsor in Ontario. He was given his first assignment to head the business office at De La Salle Institute, a co-institutional secondary school in Chicago, finding a home there for 24 years, as a teacher, coach, moderator and administrator, becoming its President.

Brother Michael began his career with CBS at Christian Brothers National Office, precursor to Christian Brothers Services, in 1979. During those three years he worked beside the company founder, Brother Joel Damian. After a 26-year hiatus, he returned to Christian Brothers Services, this time as its President/CEO in 2008.

His 14-year tenure is marked by tremendous member growth in CBS Trusts and Plans, both in locations and in beneficiaries and oversaw the acquisition of both Catholic School Management and BMT Management and Financial Services. He established CBS corporate branding and developed the Marketing and Communications Department to provide educational materials for our members, adamant that good messaging is an essential ingredient for success. ☀



HAPPY Retirement!

Farewell and thank you to our Christian Brother Services retirees

For many of us, retirement is the golden ring after a long and fruitful career. Whether the goal is rest and relaxation, spending more time with family, or beginning a new adventure, this year, Christian Brothers Services (CBS) will have its share of retirements. Eight CBS employees, some in company leadership, have announced their retirements and will say farewell in 2022. With a combined total of 166 years with the company, they will all be missed.

We would like to recognize the following individuals who will be retiring this year, all of whom have helped shape the legacy of CBS, and have devoted their careers to carrying out our mission with hard work and diligence to serve our members.

Continued on page 14

Brother Michael Quirk, FSC, Ed.D.
President/CEO

Mike Lesiak, CPA
Chief Financial and Administrative Officer

Larry Baker
Managing Director
Risk Management Services

Mary Sebbly
Retirement Project Administrator
Retirement Planning Services

Roy Wapiennik
Software Development Manager
IT & Website Services

Marie Trobiani
Senior Billing & Eligibility Representative
Health Benefit Services

Clare Lorenzatti
Senior Director
BMT Consultants

Vivian Etchison
Receptionist
Office Services

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Michael Lesiak, CPA

Chief Financial and Administrative Officer

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Managing Director, Retirement Planning
Services

John Tortolani

Managing Director, BMT Management and
Financial Services

Kelly Murphy

Director of Services, BMT Management and
Financial Services

Carolyn Randall

Controller

In This Issue



8 Preventing Sexual Abuse

10



Helping Catholic organizations meet
their employee's retirement needs



Is There a Search
in Your Future?

12

16



Going on the offensive with IT

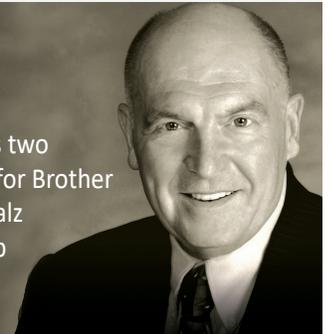


20

2023 - The Year of the Volunteer

23

CBS names two
recipients for Brother
William Walz
Scholarship



24

Christian Brothers Services
Employees receive affiliation

26

A Few
Moments
with ...
Doug McKenna



CHRISTIAN
BROTHERS
SERVICES

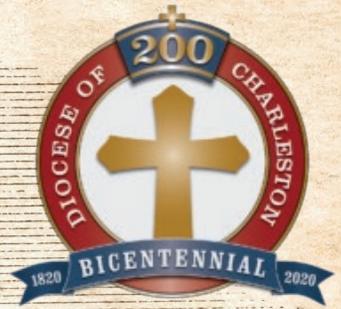
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Diocese of Charleston, S.C.

The Roman Catholic Diocese of Charleston, S.C. describes itself as a territory of history and heart. Molded into the work of the Catholic Church is that Southern charm that defines the quintessential melting pot of a community shaped by more than three centuries.

The diocese recently celebrated its bicentennial in 2020, having been established on July 11, 1820, making it the seventh oldest Roman Catholic district in the United States.

According to the archives of the diocese, Bishop John England was its first bishop, hailing from Cork, Ireland. When he came to Charleston, James Monroe was the president of the United States, and Thomas Bennett was governor of South Carolina. There were two churches, one in Charleston and one in Augusta, Georgia, and only six priests were available to serve the handful of scattered Catholics. The diocese is now more than 200,000 believers strong.



The Cathedral of St. John & St. Finbar was consecrated on April 6, 1854. This antebellum cathedral was able to seat 1,200 people and cost \$103,000 to build.

The diocese's archives show that St. Mary of the Annunciation Church on Hasell Street in Charleston is considered the mother church of Catholicism in the Carolinas and Georgia.

History dictates that Masses were reportedly celebrated in the area by Spanish priests, perhaps as early as 1526, and that Catholics came into various sections of South Carolina before 1750.

The diocese's archives show that St. Mary of the Annunciation Church on Hasell Street in Charleston is considered the mother church of Catholicism in the Carolinas and Georgia. According to the history report of the St. Mary of the Annunciation Church, in the late 18th century, there were few Roman Catholics in Charleston, and those who lived in the city — vastly outnumbered by Protestants, and barred from holding elected office — were generally reluctant to identify themselves publicly.

In 1786, however, a European ship bound for South America put into port in Charleston Harbor to avoid bad weather. An Italian priest on board offered Mass in the house of a local Irish Catholic for a congregation of about a dozen people. Generally thought to be the first celebration of the Mass in Charleston, this one act is said to have slowly engendered confidence within the small community of Catholics and their numbers began to increase, growing to nearly two hundred by the end of the decade.

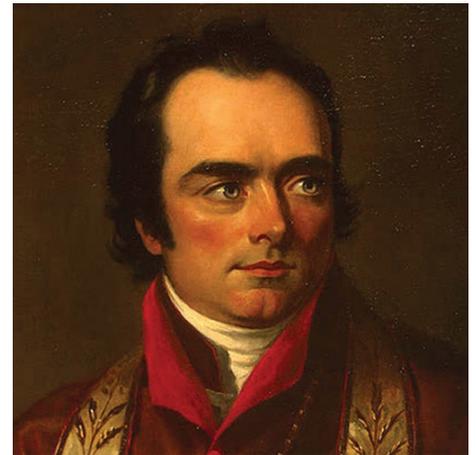
"Our diocese, which encompasses all of South Carolina, has a rich history, being created in 1820 as one of the earliest episcopal seats in the United States."

~Vicar General Rev. Msgr. Richard D. Harris

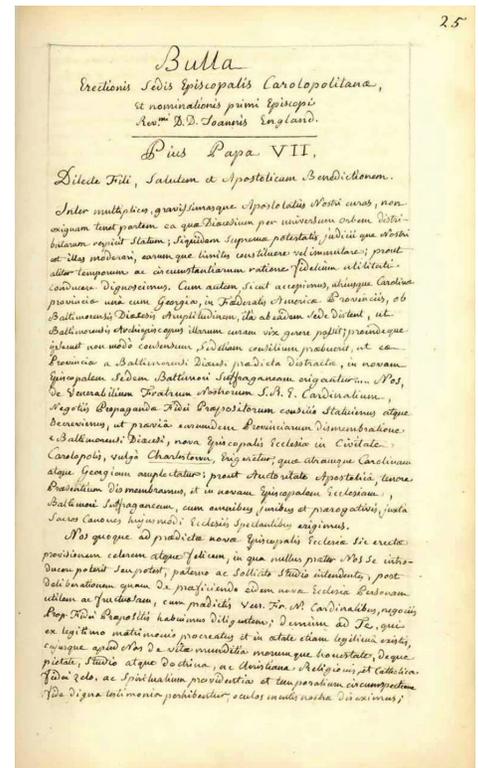
The church was permanently established on August 24, 1789, by the Rev. Thomas Keating. It was incorporated by an act of the legislature of South Carolina in 1791, and was well established when the Diocese of Charleston was created by a papal brief, and when Bishop England arrived in December of that year. It is said that the church has a crowded graveyard of local interest.

Predominant inscriptions are written in Latin, French and English. Seventeen nationalities are represented, spanning two centuries and three continents.

"Our diocese, which encompasses all of South Carolina, has a rich history, being created in 1820 as one of the earliest episcopal seats in the United States," explains Vicar General Rev. Msgr. Richard D. Harris, "We have a strong history of faithful witness to the Gospel after 200 years of existence, where we as Catholics have largely been a minority. Our small numbers only describe our mass counts, not our witness to the community around us as our impact is substantial."



First Bishop of Charleston, Bishop John England helped launch the Diocese of Charleston over 200 years ago.



Papal Bull for the establishment of the Diocese of Charleston.

Today, the diocese serves the entire state of South Carolina and is home to 93 parishes, one quasi-parish, 20 missions, 33 diocesan schools (28 elementary and five high schools) and two private schools. Its clergy and religious sisters are a local and worldwide representation of the answer to the Baptismal call to minister, serve and evangelize.

"The faithfulness of our people and dedication and prayerfulness of our priests is our biggest strength. Without the priests of this diocese, we would not have the Sacraments and without the people we would not have the ministries, schools and parish outreach that we do," said Msgr. Harris. "Our success is in the willingness of each and every Catholic coming together as one family in faith to provide for the common good of everyone."

This togetherness was abundantly apparent as the community came together, during a pandemic no less, to support the bicentennial campaign, proving the richness of their faith to invest in the future of the Church for what they hope to be the next 200 years. According to various press accounts lauding their efforts, because of the generosity of their parishioners, a host of outreach programs from the development of youth ministries and food pantries to the restoration of the Cathedral

of the St. John the Baptist in Charleston and parish maintenance plans were funded. The funds of that campaign are said to ensure a bright future for every element of outreach in the diocese.

"I like to think we are one of the best dioceses in the country," said Msgr. Harris. "We have thriving parochial schools, ever expanding outreach centers within Catholic Charities, and evangelization opportunities and efforts for many of our vulnerable populations. We strive for excellence in all that we do as a community and our reputation is one of love, sacrifice and compassion. We had strong leadership under (now retired) Bishop Guglielmone, and I see the same style and strength emerging under our newly ordained Bishop Jacques Fabre-Jeune."

Over the past few years the diocese, and state, have been blossoming with growth from both northern and southern migration. Msgr. Harris explains this influx of Hispanics and retirees from the Northeast and Midwest have considerably changed the landscape of its diocese. To acknowledge this pattern, the diocese built a new Pastoral Center to bring the majority of diocesan offices and diocesan employees together under one roof at one central location.

"We are continuously building new churches, schools, and diocesan and parish life centers, renovation and updating schools and churches every year for the last decade while many other dioceses forecast mergers or even closures. While this is exciting, it also places great pressure on our institutional structures to meet the needs of a growing state," said Msgr. Harris.

The diocese is meeting many needs of its diverse community. The diocese recently celebrated in May the ordination of its new Bishop Jacques Fabre-Jeune, CS. In its more than 200-year history, Bishop Fabre is the first Haitian and the first black bishop in the diocese.

Harris relays that it is the inclusivity and diversity that gives the diocese its strength.

"Since the diocese encompasses the entire state of South Carolina, I think the Southern charm and hospitality is a wonderful attraction that permeates every area in our diocese. People of all cultures, faiths and ages seem to get along very well, are friendly to one another, and respect one another's faith," surmises Harris.



Cathedral of St. John the Baptist, Charleston.



The diocese recently celebrated in May the ordination of its new Bishop Jacques Fabre-Jeune, CS. In its more than 200-year history, Bishop Fabre is the first Haitian and the first black bishop in the diocese.

The diocese is one of Christian Brothers Service's longest-standing members, belonging to the Employee Benefit Trust since the early 1990s, evolving in its own history spanning nearly three decades.

"In the beginning, we were looking for a typical vendor-customer relationship, one with reasonable rates (for health insurance) and one that was easy to administer," said John Barker, CPA, CGMA, Chief Financial Officer, Diocese of Charleston. "As time has gone on, we have really gained an appreciation for all the work done on the behalf of the diocese by CBS from a Catholic values standpoint and what would be covered."

Barker explains that he sees fellow dioceses struggle with commercial insurance companies navigating the sometimes tougher nuances of handling coverage for a Catholic organization.

"CBS really does the heavy-lifting for us. They are a part of the Catholic Church and it shows in their delivery of services. I have such great respect for how CBS handles its approach," said Barker, noting in its long history, they have never had a complaint about customer service and the ongoing support given to the diocese.

Managing Director of Health Benefit Services John Airola explains that is the ultimate goal of CBS, to truly understand the needs of their members, allowing for health care plans that are designed specifically for its entire group.

"It is our privilege to have worked with the Diocese of Charleston over the years and we appreciate the work of their ministry," said Airola. "It is very rewarding for us to be able to offer plans that are designed within the tenets of the Catholic Church and believe it is our responsibility to always take the concerns of our members to heart."

Barker continues to explain there were times when unique situations came up, be they Medicare issues or particular religious needs, that necessitated CBS' intricate knowledge behind health plans that do not fit the regular model.

"We have always been able to work through an issue and have a relationship with the people who can make a decision on our behalf," said Barker. "It just makes it so much easier to manage our program rather than having to deal with a larger conglomerate."

In fact, Barker, who is now, chairman of the board for the EBT, said he pursued the role to gain a new perspective into "what really was going on at CBS."

"I was used to working with the Aetnas and the United Health Cares of the world and thought what in the world is CBS," said Barker. "I found out I was given a great opportunity to not only learn about the organization but gained a greater appreciation for what they do—the level of service offered and the dashboard of knowledge on the issues facing the medical industry that is required to meet our needs is phenomenal." ☀️

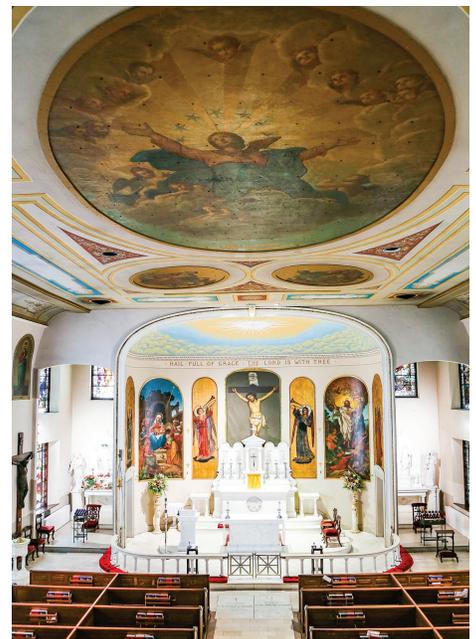
Since 1977, Christian Brothers Services has worked with Catholic organizations and dioceses in designing and administering comprehensive, cost-effective programs and services for both employers and religious including medical, prescription drug, dental, vision, life/disability and health and wellness programs. For more information, contact us at 800-807-0100 or CBEBT@CBServices.org.



Msgr. Harris during construction of the Pastoral Center.



This 175-seat chapel is on the site of the Diocese's Pastoral Center which comprises all diocesan offices, built to better serve its congregation which encompasses the entire state of South Carolina.



St. Mary of the Annunciation Church, Charleston, SC.



Preventing Sexual Abuse

When boundary violations occur

by Andrew Kopon Jr.

Organizations that are entrusted with the care of minors and vulnerable adults must take steps to ensure they have the best practices in place to prevent sexual abuse of these vulnerable individuals. Sexual predators are not easily identified. They are patient and they operate by gaining the trust of those around them. By appearing trustworthy and gaining the trust of other adults in the community, it becomes more difficult for the minor or vulnerable adult to understand the boundary violations that are occurring. By making sure that you have the best policies, training, monitoring, and investigation procedures in place, you help to protect the minors and vulnerable adults under your care in your community.

Sexual predators probe for weaknesses in the organization that allow them to engage in their crime without being detected. The better your practices for preventing, detecting, and investigating sexual misconduct, the more likely the predator will choose to leave and go somewhere else. For these reasons, it is best to regularly examine your protocols to make sure you are doing everything you can to stop sexual abuse before it occurs. Just because your organization has not had an incident of minor sexual abuse in the past does not mean it may not be happening right now in your organization and going undetected.

When boundary violations occur, your community, including staff, administrators, supervisors and employees, must be educated and trained to call out the behavior at the time it occurs.

The sexual predator engages in a steady progression of boundary violations. This includes physical, emotional, and behavioral boundary violations. Each boundary violation is an escalation of the abuse and progressively draws the victim into a web of shared secrets and aberrant behavior. It may start with playful hugging, dirty jokes, and favoritism, and progress to finding time where he or she can be alone with the minor in an office, car, or even a babysitting situation after the predator has also gained the trust of a parent or guardian.

When boundary violations occur, your community, including staff, administrators, supervisors and employees, must be educated and trained to call out the behavior at the time it occurs. This alerts the child to an understanding that such boundary violations are inappropriate and cannot be allowed to happen. This also lets the adult engaging in such behavior to understand that such behavior, sometimes referred to as grooming behavior, is inappropriate and will not be tolerated.

In addition to training and educating your employees regarding the nature of boundary violations, they need to be trained on how to immediately respond to the situation they have observed. This includes not only calling out the behavior at the time it occurs but also reporting the behavior to trained individuals designated in your organization to follow-up with monitoring and investigating the individual who has engaged in the boundary violations.

Your policies, training, and education of your community regarding the dangers of sexual abuse of minors and vulnerable adults must encourage everyone to feel comfortable coming forward and reporting any boundary violations they observe or learn about. By reporting the violations to the appropriate person, immediate action can be taken to investigate the conduct, monitor the person engaging in the reported violations, and removing that person from the community if the facts show boundary violations.

Once reported, the investigation must include an interview of the person who was the subject of the boundary violations, as well as any witnesses who may have information regarding the reported violations. Thought should also be given as to whether any cameras may have recorded the violations. The person who engaged in the reported boundary violations must also be interviewed. The accused person's reaction to the reported behavior may be very telling as to whether he or she engaged in the reported conduct.

When the investigation is completed, your leadership team will need to determine what action must be taken up to and including reporting the conduct to the police and any governmental agencies required to be notified of such allegations. In addition to determining whether the conduct needs to be reported to the authorities, decisions will also need to be made regarding discipline, up to and including termination.

There are professional groups that can provide assistance to your organization to help make sure you have the best practices in place to prevent sexual abuse of minors and vulnerable adults from occurring in your organization. These entities are regularly reviewing and updating their standards to make sure they are following the recommendations for best practices articulated by professionals who study and treat sexual predators.

The trends that we see now in this area of sexual abuse demonstrate that the predators try to stay "under the radar" in your organization. They may be volunteers, part-time employees, or coaches who are not fully assimilated into your organization but have access to minors and vulnerable adults in your community. These are not the only possible perpetrators. All employees of your organization must be trained in appropriate conduct with minors and vulnerable adults, and any employee who violates these codes of conduct must be immediately notified that any boundary violations will not be tolerated.

I recently gave a webinar presentation on these issues in more detail for the Members of the Christian Brothers Risk Pooling Trust. You may view the on demand webinar by visiting the Christian Brothers Services website. ☀

Andy Kopon Jr. is a partner with Tressler LLP, a national law firm headquartered in Chicago. For more information, please contact Andy Kopon Jr., at akopon@tresslerllp.com.

Christian Brothers Risk Management Services offers Free online training to all members of the Risk Pooling Trust. This training includes both Safe Environments and Smart Adults-Safer Children modules for your community members, employees and volunteers.

If you are a member of the Risk Pooling Trust and have questions about the online training platform registration process or on the implementation of employee online training, contact: Anthony Chimera, Risk Control Specialist at 800.807.0100 x2512 or anthony.chimera@cbservices.org

Helping Catholic organizations meet their employees' retirement needs

Planning for retirement is a necessary and important reality for workers of all ages. While retirement may seem far off for younger workers, it is a rapidly approaching inevitability for older workers. In either case, planning ahead during the years leading up to retirement can make a successful retirement more attainable.

The lack of planning for retirement can leave workers with a cloud of uncertainty that can create an unnecessary level of stress. For younger workers, taking the time to plan for retirement early on enables them to make more efficient career-related and general financial decisions prior to retirement. For older workers, a well thought-out retirement plan can help ease the worries about not being able to retire.

To put workers in the best situation to realize their retirement dreams, they will need to plan as early as possible. While accumulating the funds needed for a comfortable retirement may take years, the good news is that it's never too early or too late to plan.

Christian Brothers Retirement Planning Services offers products designed to help workers of any age plan for a successful and rewarding retirement. We administer several different retirement plans that cover the lay employees and priests who work for Catholic organizations, schools or dioceses.

We assist Catholic Church organizations in providing their employees with saving for retirement, and we can help you start from the beginning or work with you to modify your existing plans.

Defined Benefit and Defined Contribution Plans

The types of retirement plans available are often a source of confusion for employers. For most employers, a 401(k) or 403(b) defined contribution plan is a standard type of retirement plan to offer employees. In a defined contribution plan, contributions come in a designated amount from the employee and/or employer, then go into the employee's personal account within the plan and are invested based on the employee's election within the plan.

Another type of plan is a defined benefit, or pension plan. This type of plan is an employer-funded source of retirement income from which employees are provided the option of a fixed, monthly sum throughout their retirement. To receive full benefits, the employee will have had to be with the company for a certain number of years known as the "vesting period."

Defined benefit and defined contribution plans make up two of the three "legs" in the "three-legged stool" analogy of retirement planning. Coupled with income received through Social Security, these types of plans are important parts of retirement income adequacy for employees.

What Christian Brothers Services offers

Christian Brothers Services (CBS) offers Catholic Church organizations an array of choices for their employees' retirement planning needs. These include various 403(b) and 401(k) defined contribution plans, and a defined benefit plan called the Christian Brothers Employee Retirement Plan (CBERP).

All CBS retirement plans are designated "Church plans," which means only employers who are listed, have applied for a listing, or are owned by an entity listed in The Official Catholic Directory can participate.

As a Church plan, CBS plans are not required to comply with the Employee Retirement Income Securities Act (ERISA), which requires many overly burdensome regulations. Our plans mirror only those ERISA provisions that are beneficial to participants.

Christian Brothers Retirement Planning Services offers products designed to help workers of any age plan for a successful and rewarding retirement.



With well over \$1 billion in assets, the CBERP, working as a whole, incurs administrative and investment expenses that are relatively more cost efficient than a single-employer plan.

403(b)/401(k) Retirement Savings Plans

Defined contribution plans have become the most common retirement plans offered to employees. Both 403(b) and 401(k) plans are considered defined contribution plans. The primary difference between the two is the type of employer sponsoring the plans—401(k) plans are offered by private, for-profit companies, whereas 403(b) plans are only available to nonprofit organizations and government employers.

While these plans are easy to manage and easy for employees to fund, many plans don't offer the ease of a hands-off approach that some employers and employees would like. This is referred to as a "turnkey" approach. The turnkey approach is geared for small to midsize organizations, but can be offered to any size organization.

Larger organizations, with 1,500 or more employees, may prefer a more hands-on approach to their employee retirement plans, including the flexibility to design their own investment line-up, either on their own or in consultation with an investment professional.

Christian Brothers Retirement Planning Services offers the best of both worlds, with the Christian Brothers Retirement Savings 403(b) Plan (CBRSP) and the Christian Brothers Employee Retirement Savings 401(k) Plan (CBERSP).

For those employers who prefer a "turnkey" approach, the administrative services for the plans are all encompassing. These services include:

- ▶ *Daily valued record-keeping*
- ▶ *Online web access for both employer and employees*
- ▶ *Online quarterly benefit statements*
- ▶ *Communication materials*
- ▶ *On-site meetings*
- ▶ *All legal requirements*
- ▶ *Access to Vanguard investment professionals*

For larger organizations, CBS offers an open architecture approach, which provides an employer the advantage of an extremely competitive record-keeping cost structure that we have negotiated with The Vanguard Group, without requiring the use of their investments. We have also established a group trust through a major financial institution, which could provide the legal structure for the Plan, if needed, at no additional cost.

Christian Brothers Employee Retirement Plan

Employees of Catholic organizations are dedicated to working in faith-based institutions. Catholic Church employers may turn to defined benefit or pension plans to help these employees experience a financially sound life during their retirement years. However, employers may find defined benefit plans too costly and complex to administer.

With this in mind, Catholic employers may want to consider merging their current or frozen defined benefit plan with the CBERP. The CBERP is funded entirely by the participating employers, with benefits based on a formula that is applied to an employee's career compensation as defined in the Plan to provide a monthly benefit payable for life at retirement.

Through the economies of scale, the CBERP can provide the continuation of the defined benefit plan that is more cost effective to an employer. Employers who join the CBERP receive numerous benefits and the flexibility to match their contributions to their budgets.

With well over \$1 billion in assets, the CBERP, working as a whole, incurs administrative and investment expenses that are relatively more cost efficient than a single-employer plan. Additionally, the Plan offers employers nine contribution levels, allowing them to select the one that best suits their retirement budget with contribution levels that can be changed to continue to meet future budget needs.

For employees, the CBERP provides a solid foundation for retirement that is not market dependent, allowing them to plan for retirement income with greater accuracy and security. ☀

Find out more

Let Christian Brothers Retirement Planning Services assist your Catholic organization to meet its employee retirement needs. See how you and your employees can benefit from the best-in-class products and service that CBS has been providing to Catholic employers for over 60 years.

Visit cbservices.org for more information on our 403(b)/401(k) defined contribution plans, the Christian Brothers Employee Retirement Plan, or to view our Retirement Planning Resources. Contact us at 800.807.0700 or RPScustomerservice@cbservices.org to see how we can help you.

Is There a Search in Your Future?

If you anticipate a search for a key role in your school, the steps you take NOW will greatly impact its success. Ample preparation is particularly important given the intensely competitive landscape in which faith-based organizations find themselves.

In a perfect world, succession planning would be so firmly in place that searches would not be required. When last we checked, it wasn't a perfect world. Many schools are simply too small, or budgets too tight, to have an heir apparent on staff. If this is your reality, pre-planning your search is even more vital.

The goal of a search is to not only find the ideal candidate but also launch that person in the role and establish a foundation for the person's success. Such an orientation should inform all elements of the search process.



Step I – Position Clarity

Having updated and accurate materials as cited here, and answers to the questions below, will ensure you are ready to launch your search.

Position title and job description

Candidate criteria

Job descriptions of direct reports

Organizational chart

Salary and benefits package

Reason for position opening

Candidate selection/approval process

What are the top priorities for this position in the next three years?

What challenges and opportunities exist for the organization?

What qualifications, experience, skills, etc., should be sought in the ideal candidate?

What makes this position, and the organization, appealing?

Step II – Search Committee

Your search committee has multiple responsibilities, which should guide who is chosen to participate:

Contribute to and Review Position Profile

Develop Publicity Strategy

Network and Extend Profile

Review Application Materials

Attend All Interviews

Interview Candidates and Deliberate

Recommend Candidate(s) to Hiring Official

Maintain Objectivity and Confidentiality

Particularly important among these are the ability and willingness to promote the search extensively to their personal and professional networks. The best candidates are often not seeking a new job, but when personally contacted by a colleague, friend or relative, give it serious consideration. It is also essential that each member of the committee understands and commits to maintaining the confidentiality of the search at each step of the process. Candidates have grown increasingly sensitive to privacy regarding search over the past few years.

The search committee should represent each of the areas within the organization that fall under the position's responsibility. Ideally, direct reports to the position do not sit on the search committee. Individuals who can represent multiple constituencies will enable you to achieve representation without needing an overly large committee.

It is very helpful if everyone on the search committee has flexibility in scheduling. If interviews can only be conducted in the evening, the process will take much longer. Likewise, the candidates need availability. Once you've identified finalists, you want to move fast. If you're interested in specific candidates, the likelihood is they are being pursued by other schools as well. Search committee members who relocate for parts of the year, have excessive travel schedules, or simply too many demands on their time, may not be able to prioritize your search.

Many first interviews are conducted via video conference. Be sure each member of the committee is comfortable and capable of managing the technology so that the interview process isn't hijacked by "we can't hear you" and "you need to unmute."

Step III – Position Profile

The days of posting a job description on National Catholic Educational Association and awaiting an avalanche of resumes are over. Given the competitive landscape for jobs, attracting candidates requires aggressively marketing the positions in such a way that the opportunity is compelling and interesting. Your position profile should describe not only what you seek in candidates but also what they can find in your school and the role. Photos, fast facts, information about the community in which you dwell and where you serve, testimonials, organizational strengths, mission, vision, values – all should give potential candidates a good sense of the organization and enable them to see themselves in the role. You can see samples of profiles at <https://www.cbservices.org/current-csm-admin-searches.html>.

Be sure to clarify the strengths of your school. Upper level position candidates will likely want insight into...

- Enrollment** - trends over the past five years
- Finances** - tuition, aid, philanthropy, debt, reserves, endowment
- Tenure** - of positions that most regularly interact with that of the role advertised
- Board** - type and efficacy

The profile should also include your application requirements, process and deadline. Typical materials include letter of introduction, resume, references, and a written response to a provided essay topic or question relevant to the position's priorities.

With the position profile written, designed and ready to post, and the other steps covered, you are well on your way to a successful search.

The collage displays four distinct position profiles for De La Salle Institute, Chicago, Illinois. Each profile is a page of information designed to attract candidates. Profile 1 features a large photo of a student and text about the school's commitment to education. Profile 2 includes a photo of a school building and details about the search process. Profile 3 shows a photo of students in a classroom and highlights the school's academic achievements. Profile 4 features a photo of a group of students and emphasizes the school's Catholic identity and community values. Each profile includes sections for 'Qualifications', 'Salary / Benefits', 'Ideal Candidates', and 'Role of the President'.

What Else?

Oh, little things – advertising and outreach; application vetting; interview prep/search committee orientation; interviews – screening, reference, search committee; finalist interviews; approval process; announcement/communication plan; visit day; onboarding; etc.

A comprehensive search covers a lot of ground – and more than we can describe here. Start with these first three steps – as far in advance as possible – and you will find that the rest will flow much more smoothly on your path to LAUNCH the ideal candidate. ☀

14 CBS Retirements



Brother Michael Quirk, FSC, Ed.D.
President/CEO

Perhaps the most recognized individual retiring this year is the President and CEO of the company, Brother Michael Quirk. Beginning as CBS President/CEO in 2008, Brother Michael's tenure is marked by tremendous member growth in CBS Trusts and Plans, both in locations and in beneficiaries.

Brother Michael oversaw the 2016 acquisition of Catholic School Management, bringing consulting services into the company's portfolio. In 2017, Mission Advancement Consulting further added to the company's list of services. In 2018, Brother Michael worked with the CBS Board to oversee the acquisition of BMT Financial Services, bringing a company that assists over 280 religious institutes and many sponsored ministries with their daily operations under the CBS umbrella.

In one of his first actions as President/CEO, in 2010, Brother Michael established CBS corporate branding and the Marketing and Communications Department to provide member organizations and participants with relevant information about their benefits. That same year saw the first issue of OutReach Magazine, which started as a small companywide newsletter and has since grown into the full magazine you see today, meeting the demands of our members and the growing organization.

During his tenure, Brother Michael reorganized the company's management structure and merged divisions to increase company operations and to enhance Member/Client services. Taking a stand for CBS membership, under Brother Michael's tenure, the Employee Benefit Trust initiated litigation to protect our employee health plan from government intrusion which resulted in the *Little Sisters of the Poor v Burrell* case which went to the U.S. Supreme Court for a positive resolution.

To further serve our members, and to ensure proper training for CBS leadership, Brother

Michael saw that investment was made in training for managers on all levels in performance management, sales, best practices and other topical management skill training.

Brother Michael will officially retire August 31, leaving a lasting memory of a true servant leader, dedicated to the mission of Christian Brothers Services, its employees and membership.



Larry Baker
Managing Director
Risk Management Services

Larry has spent 44 years in the insurance, risk management and alternative risk financing industry. After serving as vice president, field operations with Gallagher Bassett Services, Inc., Larry joined CBS in January 2008 as Manager of Claim Services. He soon advanced to become Director of Risk and Claim Services before becoming Managing Director of Risk Management Services in 2019. Larry is a recipient of many industry certifications, including the Certificate for General Principles of Insurance, Principles of Fire, Marine and Allied Lines Insurance and Principles of Casualty Insurance and Surety Bonding, issued by the Board of Governors, Insurance Institute of America, Inc.

"Serving the ministries signatory to the Risk Pooling Trust has been a mission, not just a job. It has truly been my privilege to lend support to our membership by applying the knowledge I have acquired over the course of a 45-year career to the needs, and hopefully, to the benefit of their operations," he said. Larry will retire from CBS at the end of August.



Mike Lesiak, CPA
Chief Financial and Administrative Officer

Mike joined CBS in February 2009 as Chief Financial Officer, bringing with him more than 40 years of experience in the financial and executive fields. In his almost 14 years at CBS, Mike has supported the growth of the company in its mission to provide outstanding services to Catholic institutes, dioceses, religious orders and employees in their insurance, retirement benefits and other financial consulting needs.

He has created transparency in the finance function within the company and the Trusts it serves and has developed a robust system of internal control and created systems that provides solid oversight for both the company and its Trusts. Mike will retire from CBS in September.

"In my almost 14 years at CBS, it has been filled with many challenges, successes and professional/personal fulfillment. There is a cooperative spirit and a caring environment to serve CBS' clients through the programs and services we offer. It's a good feeling to work in this atmosphere. There have been many changes throughout my years here at CBS, whether they be internal department changes or changes effecting the whole company and the Trusts we serve. People appear to embrace the change, knowing it is in the spirit of continuous improvement and service to others. I hope the changes and recommendations I have made along the journey will continue to help CBS in its Mission of serving Catholic organizations," he said.



Mary Sebby
Retirement Project Administrator
Retirement Planning Services

Mary joined CBS in February 1986, serving as a housekeeper and working in the mailroom before joining the Retirement Planning Services (RPS) division as a Senior Retirement Representative, Retirement Administrative Coordinator, and Retirement Project Administrator. It's fair to say that if you have been a member of RPS for any length of time, you were sure to encounter Mary's kindness and professionalism as she assisted you with your account.

Mary uses a quote from author Wayne Dyer to describe her time at CBS: "Doing what you love is the cornerstone of having abundance in your life." Mary said, "What an amazing journey this has been! From typewriters to computers, desk phones to cell phones, and site visits to webinars and online meetings. In a world that is constantly changing, CBS has continued to forge ahead. I have immensely enjoyed serving our members as well as working with CBS Management and Staff for nearly four decades. I would like to express my heartfelt gratitude to all who believed in me over the years and to thank CBS for the opportunities afforded me. Thanks for the memories!" Mary retired from CBS in June.



Roy Wapiennik
Software Development Manager
IT & Website Services

Roy began working with the company as a vendor with BSSI in the early 1990s, but officially joined CBS in October 2008. In his 13 years of dedicated service and commitment to our mission, Roy was, among other things,

instrumental in ensuring the Health Benefit Services billing runs each month without any issues. As a leader in CBS employee culture, Roy created employee involvement through many events such as the CBS Office Olympics, Fat Tuesday and Paczki Days events, events for the CBS Health Initiative Team, and the company's Hello to Summer Party. As a fitting reminder of Roy's spirit and generosity, he organized CBS' recent Ukraine Fundraising event.

"We thank Roy for his long, dedicated service and commitment to our mission, and we wish him well as he begins his next chapter," said Tom Drez, CBS Chief Information Officer, Chief Privacy Officer and Chief Security Officer. Roy retired from CBS in May.



Marie Trobiani
Senior Billing & Eligibility Representative
Health Benefit Services

Marie has been with CBS for 25 years, having joined the company on July 14, 1997 as a Mail/PPO Clerk in what was then known as the Health Management Services for Religious (HMSR) department. She advanced to become a Senior Enrollment/Billing Clerk, and when HMSR merged with the Employee Benefit Trust (EBT) to become Health Benefit Services (HBS), she was the only E/B person to join the Billing & Eligibility Team.

"Working for CBS has been the most rewarding and fulfilling time in my life. I can't believe 25 years has gone by so fast. I will miss all my co-workers and others I have met along my journey," she said. Marie retired in July.



Clare Lorenzatti
Senior Director
BMT Consultants

Clare began her employment with BMT in 1992 as a Senior Consultant after serving two years as President of the Board of Trustees of NATRI, the predecessor to RCRI, and as the CFO for a religious institute. From 1992 to 1994, she also served as the part-time interim Executive Director of NATRI. In 1994, Clare became a partner of BMT. She has served numerous BMT clients, both domestically and internationally, as a Chief Financial Officer. "She has been an incredible resource for many of the BMT staff, and a true partner and valued colleague to everyone at BMT, CBS, and equally important, to the clients that she served so well. Thank you Clare. You will be greatly missed," said BMT Managing Director John Tortolani. Clare retired in December 2021.



Vivian Etchison
Receptionist
Office Services

For the last 19 years, the smiling face of Vivian Etchison was the first thing visitors saw as they entered CBS' Romeoville, Illinois office. As the receptionist for CBS, Vivian greeted every visitor with the same professionalism and friendliness, whether they were there for the first time or were familiar faces awaiting their appointments and business meetings. Vivian retired from CBS in July. ☀️

You Are Here!



Going on the offensive with IT

Mapping out your IT future

The COVID-19 pandemic put us all on the defensive, including the Information Technology (IT) world. Cybercriminals took advantage of weaknesses in our systems and exploited them with everything from phishing attacks to the troubles and risks associated with employees working from home. Our focus for the past few years has been on cybersecurity – and rightly so. Now, as we move forward and our organizations bring their employees back to the office, either in full-time or hybrid situations, it's time to change things up and go back on offense with our IT projects.

In a sign of things to come, Gartner, a technological research and consulting firm, is forecasting worldwide IT spending to reach \$4.4 trillion in 2022. Some other estimates are as high as \$5.3 trillion. Even during the pandemic, the trend went up, and it is not expected to slow, with companies spending most of their IT money on business services, followed by software, then devices and infrastructure.

How Much Should You Spend On IT?

With IT spending, there is no silver bullet or one right answer for everyone. You need to meet your specific goals, but there are some organizational IT benchmarks to give you an idea of IT spending. The average small company (less than \$50 million in revenue) spends 6.9% of its revenue on IT. Other factors must be considered, including your industry. For instance, insurance and financial services is going to differ from healthcare. It is up to all of us to take these bits of information and come up with a winning recipe for ourselves and our organizations.

Another benchmark states that most mid-sized companies spend about 4% of their annual budgets on IT, about \$12,000-\$14,000 per employee. That number includes direct equipment for those employees such as laptops, iPads, and other mobile devices, and also builds in all the infrastructure and software that an organization uses, from the accounting system to everything else that may already be installed in your organization or that you obtain as a service.

These numbers also vary dramatically from business to business, but to give you more of a range of what companies spend, in the financial services industry, IT spending ranged between 4.4% of company revenue at the 25th percentile to 11.4% at the 75th percentile in 2019. Consider how your organization compares against these numbers.

In IT, offense is all about creating, enhancing, modifying and adapting.

A strategy, even if it's just a paragraph or a few sentences on a page that connects IT to your business, is crucial to success.

Offense vs. Defense

In IT, offense is all about advancing – creating, enhancing, modifying, adapting – all of which will be based on our mission for our organizations. For the past three years, we were playing defense. Defense is all about protecting – preventing, monitoring, detecting, responding and mitigating. These elements include cyber risk-management, risk exposures, cybersecurity and cyber liability. These defensive measures are well and good, but they don't really advance our organizational mission for our stakeholders. They are important, but advancing is much more fruitful and exciting than simply protecting. However, before you advance, you must have a plan and be focused.

A strategy, even if it's just a paragraph or a few sentences on a page that connects IT to your business, is crucial to success. IT strategy is a comprehensive plan that outlines how technology should be used to meet IT and business goals. It is a written document that details the multiple factors that affect the organization's investment in and use of technology.

Plan For Where You Want To Be, Not Where You Are Now

Think a couple of chess moves ahead, but remember, technology changes fast. We have gone from big mainframes to decentralized computers, to personal computers and client-server, to the internet, to mobile devices in a relatively short amount of time. These were all revolutions, but in an organization, we don't need to hit every revolution when it comes out. It's better to pick a point, jump in and work to evolve. At CBS, we prefer to employ a continuous improvement philosophy. We never want to put in a system then forget about it for years, then have to come back to it and fully replace it. It is much easier to take baby steps to keep a system upgraded, updated, and even to add modern features along the way. It's much easier to evolve than to hit every revolution.

When you are thinking about the big picture within your organization, technology should be connected back to the business. Using your organization's strategic plan is a great way to do it. Everything should start with your mission, which should lead to strategic plan objectives. From there, you can include divisional goals, annual divisional work plans and divisional budgets. That ties everything together, from the highest levels of your business down into every level of your organization. But business and IT must be connected. One cannot function without the other.

Consider Your Stakeholders

How do your stakeholders fit into your IT plans? Stakeholders can include your members and employees, and those you serve, including your customers and donors. Think about what they want. How often do you solicit feedback from them? What kinds of things are they asking from you that might be new? These are all things you can use to go on offense with IT.

Consider your current state of IT usage:

- *What are your pain points?*
- *What are your challenges?*
- *What are your most expensive items?*
- *Do you have aged hardware and software?*
- *Are your systems disparate and disconnected?*
- *Do you have expensive maintenance contracts?*
- *Do you have inefficient and/or ineffective business processes?*

If you have inefficient and ineffective processes, you can start by mapping out your business process. It may surprise you to find the inefficient steps you are making. Mapping the process allows you to find new, more effective steps. These questions can lead you to looking at and using IT to go on offense to help your organization – to be a strategic asset.

Another good way to create a project is to conduct an inventory and assessment to create IT recommendations. You can start with your systems – hardware and software – which can include servers in a centralized data center or computer room, down to what every employee is carrying around with them, including their laptops and mobile devices. Conduct an inventory and assess those.

Following an assessment, you will likely find one or more projects that you will want to create and complete because you will hit one or more of your key business drivers: improve productivity and operational efficiency, stakeholder services, and overall effectiveness. You can end up with 40, maybe more, maybe less, different recommendations, which you can then prioritize and work towards completing over time. Doing this will give you an excellent picture of your current state of IT usage within your organization and provide you with recommendations that will determine your future state of IT.

Once you know what you want your future state of IT to be and where you are currently, everything else is in the gap. Knowing what the gap from point A to point B is will allow you to create the projects over time that will get you where you want to go.

How To Pay For New Projects?

New projects always have an expense associated with them. You can pay for them by finding savings in the things you are already doing, or by improving fundraising. To assist our customers in both of these ways, at CBS, we have a Vendor Referral Program. Since no organization can do everything on their own, we create alliances. On the IT and Website Services side, we have three principal partners we use. For example, when customers come to us to host servers or software applications, we provide data centers and servers that are provided by CBS, but powered by US Signal, one of our partners.

Another of our partners, Eclipse Communications, offers a Communications Review Service that finds savings by looking at all the invoices an organization has for internet access, wireless voice, landlines, and cable TV. It only takes a few minutes, and Eclipse has worked with all the carriers worldwide. Many of us have been with one carrier for years, whether it is a phone service or cable TV provider. You could be paying a "loyalty penalty" where rates creep up slowly year after year and the rates you are paying are no longer competitive. For a review, at zero dollars up front, CBS and Eclipse take a percentage of any savings found for the first year, after which, 100% of the savings is yours, which you can then repurpose to other projects.

We also partner with Give Central, a fundraising platform. If you don't already have a fundraising platform, Give Central is a great way to help improve your fundraising, and their credit card transaction fees are generally lower than what you might find from your current provider.

Impactful Technologies For Your Organization

There are three tried-and-true technologies that are readily available to all of us and could positively and immediately impact our organizations from the get-go:

1. Cloud Processing

If you have any centralized computer equipment, whether hardware or software, it may no longer make sense to have those within the four walls of your organization. Moving to the cloud provides you with greater economies of scale and is more secure than you can be on your own, especially since we are under attack all day, every day, from the bad actors attempting to get through our firewalls. Cloud computing and storage also makes you more nimble and agile. You don't have to own anything, and you don't have to worry about a piece of equipment and its back-up and where all the data and its back-ups are stored.

You should also consider shifting your IT operations, development and security burden in whole or in part to a cloud provider.

Many applications can go to their manufacturer. For example, if you use QuickBooks, you can move it to Intuit's cloud instead of installing it on a centralized server or single computer within your organization. It is true you may have some things you can't move onto a manufacturer's cloud. If that is the case, let CBS know what those things are and we would be happy to help provide an improved solution.

Finally, embrace everything you see that is "as a Service" (aaS). That can include infrastructure as a service. Outsource everything you can as a service so you can focus your organization's mission on higher value activities that you define.

2. Workflow Automation

Work smarter, not harder. Pick your most complicated business process and map it out. You will find steps you didn't realize that were in there that can be eliminated. Start small and expand.

Automating your workflow through IT can reduce service delivery times to your stakeholders, including employees and those that you serve. You can do this by providing self-service everywhere. Providing stakeholders with self-service means they won't have to call or email (or maybe even fax) someone in your organization during only business hours. Self-service means less time that your people need to spend on delivering requests and more time on other activities needing attention.

Workflow automation keeps your people on high value activities that cannot be easily replicated by machines or outsourced to others who don't understand your organization.

3. Mobile

Mobile means smartphones, laptops and tablets. Wherever we are, that is where our office is these days. Are we efficient where we are? Maybe you have some pre-pandemic projects that got starved out of resources and would now like to restart. That's considered offense, not defense.

Consider also that wherever anyone else is, that's where their office is, too. One organization that works with another organization is only one-half of the equation. It's a two-way street. For example, if CBS wants to work on processes that eliminates paper, we can only do that for the paper that we generate. Look at your mailrooms. If you still have batches of paper coming into your organizations, what can you do to work with the source of that paper to stop it from coming to you? Hopefully, the creator of the paper is trying to do the same thing.

Don't pin your stakeholders or audiences to their desks, just as you don't want to pin your employees to theirs. Being mobile is playing offense!

The Future Of Work

Another good place to go on offense is when you think about the future of work. You have probably already had some discussions about what the future of work post-pandemic may be in your organization. Many organizations are moving to a hybrid workforce and workplace. What is a hybrid workplace? A hybrid workplace is a model that combines remote work with office work. Some employees can work from home and others can work in the office, and employees can spread their time across home and office as well within the same week or even the same day.

Whatever decision you make regarding your workforce in the future will have an IT component to it, so you can count on projects developing there, and they don't all have to be about cybersecurity and VPNs designed to protect us when we're working remotely (which is only defense).

Consider A CBS Virtual Workspace

Think of a virtual workspace as a hosted Windows environment, or Virtual Desktop Infrastructure (VDI). It means that Windows is hosted somewhere else and everyone in your organization can access their full Windows desktop through a browser with nothing special installed on either their own or an organizational computer. VDI can be thought of as a modern-day computer terminal, but instead of being character-based and a green screen, it's Windows, graphical interface, and has a mouse. However, because it's only using your browser, it's only the keyboard and display, with the CPU and software really being hosted in some other data center.

**CBS can help
you get here!**



IT Objectives and Goals Met

Imagine if you and your employees could get all of your software services and access to data for your organization through a hosted Windows platform with no Windows to keep up with and service delivery improved and costs reduced for:

- *On-premise servers hardware & software licenses and maintenance*
- *Data backups*
- *Server and endpoint security software licenses and maintenance*
- *Help desk support, maintenance, monitoring and management*
- *Desktop and laptop computers*
- *Compliance testing and reporting*

Add up your costs for all of the above. A cloud provider, such as CBS, can bid on providing a virtual workspace to help you improve and become more efficient and effective and to meet your goals and objectives.

Put your IT on the offensive and let's move forward! ☀

Tom Drez is the Chief Information, Privacy and Security Officer for Christian Brothers Services.

CBS is a full-service IT & Website Services provider with a growing portfolio of products, services and preferred vendor relationships to assist Catholic organizations in meeting their IT goals and objectives fully and affordably.

If you have questions or would like guidance on cloud hosting services, virtual workspaces, or our Vendor Referral Program, CBS ITS is here to assist you wherever it can. 800.807.0200 / customerservice@cbprograms.com.

2023 – The Year of the

VOLUNTEER

While the silver linings of COVID are rare, one that we can certainly appreciate is the impact it will have on volunteering.

- *After having been deprived of involvement with the causes many find near and dear to their hearts because of COVID restrictions, there is great fervor among those finally able to return and engage.*
- *The "Great Resignation" has created a new audience of potential volunteers who are eager to join others in advancing missions and ministries they value.*
- *During the lockdowns, many found themselves seeking new frontiers that brought more meaning to their lives. For some, this led to career changes. For others, it was high-level volunteering—taking on specific tasks that in the past would have been handled by staff—for organizations serving those they wish to assist.*

These impulses and the increasing emergence from COVID limitations predict to make 2023 the Year of the Volunteer and an opportunity not to be missed among Catholic entities.



How Valuable?

Depending on your use of volunteers, they could be one of your most valuable constituencies. Research indicates that those who volunteer and take an active role in your organization are more likely to support it financially as well. In most environments, volunteers represent a significant portion of your donor, or potential donor, audience.

A strong, well-conceived and managed volunteer program offers substantial advantages to the institution and the volunteers.

As with everything, it comes down to audience and objective: What are you trying to achieve and with whom? The more it can be tailored to address the needs and interests of the volunteers and those they will serve, the greater the success and pleasure.

Structure

The best volunteer programs focus on four areas:

- 1 identification of need,
- 2 recruitment/enlistment,
- 3 orientation/training,
- 4 motivation/recognition.

Together they add up to an increasing number of individuals who bring considerable talents to your ministry, enjoy the roles they play, and stay engaged over time, further cementing their relationships.

Research indicates that those who volunteer and take an active role in your organization are more likely to support it financially as well.

1 Identification of Need

Before you seek the assistance, wisdom and hard work of prospective volunteers, make sure that your needs are clear. Ask staff and leadership about all the ways in which volunteers could be employed so that you can accurately describe each task and its requirements. Gather as many specific details as possible.

This is an opportunity to be creative, to dream, and to imagine a different way of operating. Perhaps you won't be able to fill each and every option at the start, but it is always good to know what is desired and why.

While there will be no end to the minor or time-consuming tasks we can ask volunteers to undertake, remember that they can play bigger roles than busy work. What is most important is that there is a clear understanding of what the "job" is, what it requires, what need it addresses, whom it helps. Be as clear as possible about duties/responsibilities, contact person, schedule, benefits, priority.

Once determined, you are in a position to offer opportunities that can more readily match the interests, abilities and availability of your volunteers.

CHRISTIAN BROTHERS SERVICES

Job Description

POSITION:	Communications Writer and Social Media Specialist Exempt <input checked="" type="checkbox"/> Non-Exempt <input type="checkbox"/> Full-time <input checked="" type="checkbox"/> Part-time <input type="checkbox"/> Temporary <input type="checkbox"/>
DIVISION:	Marketing
EMPLOYEE:	Laura Katauskas
FUNCTION:	Plan, organize, develop and create a wide variety of company communications that will be used in a variety of mediums including written, internet, audio/web conferencing and live presentations. Act as social media specialist to research, develop and create content for social media outlets.
REPORTS TO:	Senior Writer

RESPONSIBILITIES INCLUDE, BUT ARE NOT LIMITED TO THE FOLLOWING:

Responsibility	% of time:
Research, develop and write content for internal and external company publications, including but not limited to newsletters, educational pieces, flyers, brochures, magazines, website, social media sites, internal newsletters, etc. Work with Associated Press guidelines. Ensure each piece meets all deadlines and Associated Press guidelines, up-to-date. Ensure each piece meets all deadlines, including website, up-to-date. assigned divisions to keep copy for all materials.	20
Act as the social media specialist by building and executing social media strategy through competitive research, platform determination, benchmarking, messaging and audience identification for both CBS and CSM. Create an annual and companywide social media calendar and submit to the manager of marketing/communications each September (featuring social media strategy and plans for the following year.) Research, develop, create and share content for CBS and CSM social media outlets that builds meaningful connections. Work with all CBS divisions. CSM social media specialist and vendor/social collaborator's social media outlets. Provide monthly reports on followers, clicks, retweets, follower growth, influencer report, volume of posts, reach rate, total engagement and engagement per post.	20
Demonstrate creative and analytical skills with the ability to set priorities, meet deadlines and handle multiple projects.	15
Ability to work effectively under deadlines.	
Coordinate schedules and timelines to ensure communication materials are delivered on time.	
Work with department designers to maximize the use of our customer based website, printed materials, social media outlets and collateral items.	15
Effectively participate as a Marketing & Communications team member to ensure consistency of message and accurate strategic positioning of all projects, with	10

2 Recruitment/Enlistment

We always want to cast a large net for volunteers, so don't limit to only those who can take on specific roles. List your volunteer activities but give more than the standard option of "I could do this." Maybe this is something that requires preparation, i.e., "I could do this with training." Perhaps your prospective volunteer is not equipped but has many connections and therefore, "I could find someone else to do this." With this range of involvement, you'll likely get current volunteers moving to new areas as well as new volunteers that others have identified for you.

Depending on your type of organization, you may have employment info on a prospective volunteer that indicates he/she possesses the very skills you need for a specific task. If so, recruit directly and demonstrate the link. Be ready, however, for those who want a very different role from what they do all day.

Enlistment

The move from defining needs and interests to enlisting volunteers is best pursued in person. Often we can send letters, distribute flyers, make announcements and get little in response.

This is not a case of people refusing to take a role; perhaps they just don't think you're referring to them. These efforts remain necessary, however, because they send a clear signal that all are welcome. But for those volunteer roles vital to your organization, additional methods must be developed.

The more you can individually approach a prospective volunteer, the more successful you will be. The key is to have the person to whom they can't say "no" extend the invitation. Of course, the "recruiter" must have the right attitude; it can't be done under duress—the prospective volunteer will know.

In the world of volunteerism, there is the phenomenon known as the "warm body vs. specific need" recruitment. Are you merely seeking anyone with a pulse, or do you require specific skills? What is the volunteer's area of interest? What level of volunteer responsibility are they willing to undertake? These are key considerations.

Your website should provide an easy way for a volunteer to indicate his/her area of interest, availability, and provide contact info for follow-up. Don't forget the "where needed most" option for those who want to help but don't have a role in mind.

3 Orientation/Training

Provide each volunteer with an orientation—tour, materials, introductions, opportunity to ask questions, etc.

Based on the role taken, the training may be as simple as "this is how we do it" to something more specific involving formal preparation programs, role-playing, etc. It's one thing to ask a volunteer to read stories to third graders from 1:00 p.m. to 2:00 p.m. on Fridays and quite another to chair the auction which is already incorporated into the operating budget.

The orientation and training must suit each situation in order to ensure a meaningful and successful experience for everyone involved. Once the project is complete, follow up to determine if the earlier prep was adequate and/or how it can be improved. Conclude the orientation with a clear statement about the next step—date, time, place, activity.

4 Motivation/Recognition

When someone volunteers, do not hesitate, do not pass GO, do not collect \$200 before acknowledging and thanking him or her for this commitment.

The Ignored Volunteer Syndrome

If you've ever wondered "Why don't we get more volunteers?" check first with how they are handled once they make their interest known. If you have a big volunteer sign up at the ministry fair, and then the future volunteer never hears back, that not only diminishes interest but also stimulates word of mouth that "they don't really need/want us." Before you promote and recruit, make sure that you are ready to respond in a timely manner with thanks, enthusiasm and next steps.

While one of the greatest disappointments to prospective volunteers is to offer to become involved and then to be ignored, a close second is the volunteer who brings specific expertise, offers it and is underutilized.

Perhaps there are reasons why you wouldn't want to engage a volunteer in the capacity he/she initially indicates. This might have to do with confidential information, relationship issues, etc. This is your prerogative. However, to dismiss the offer without recognition is to create a very negative experience for that person, which may have significant ramifications.

Saying Thank You

Some tasks undertaken by the wonderful human beings called volunteers are enormously interesting and fun. Others are repetitive, dull and often downright dreary. Both are necessary.

In the world of motivating volunteers, it's helpful to think about the nature of the jobs. Often we praise, thank and acknowledge the one-time act more than the ongoing, less dramatic involvement. Group events to thank all volunteers are certainly worthwhile, but can't substitute for ongoing individual reinforcement and appreciation. The methods by which we express our deep thankfulness are only limited to our imagination. Letters, phone calls, plaques, dinners/parties ... the list could go on and on. Ultimately, it comes down to good manners and the fundamental basis for all institutional advancement activity—relationship building.

More Than Thank You

It's just not enough to show appreciation and recognize your donors. You also need to check in (especially with ongoing volunteers) and see how they are faring in the roles they have chosen. What did they like best about their involvement? Least? Was it a rewarding experience? Did they see ways to improve our operations and, if so, how? What advice would they like to offer? Do they wish to renew? Would they like to consider other volunteer avenues?

This not only provides you with understanding of the volunteers themselves and their experiences, it can also be a tool for recruiting new volunteers. Stats and testimonials can prove highly motivating for those who are considering such a move.

Catch and Release

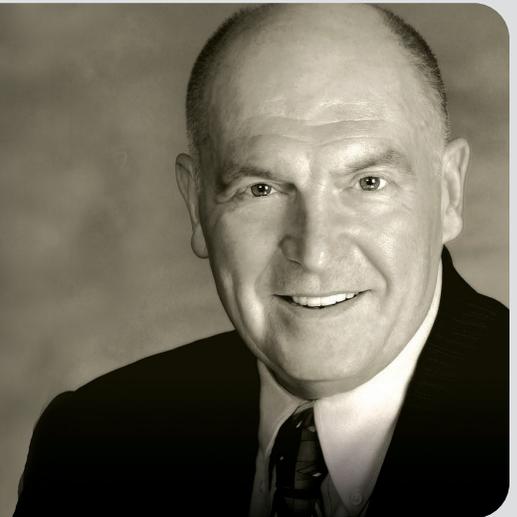
The wonder, the beauty, the delight of a phenomenal volunteer ... it warms the heart and it GETS THINGS DONE. A renewing, effective volunteer who truly extends the reach of the staff and requires minimal supervision is the ideal come to life. Therefore, it can be ever so tempting to retain that individual long past their natural interest in the role. Yet turning them into indentured servants or creating a sense one must move or die to get off a committee is hardly the note we wish to strike.

We often lament that, "It's the same people who do all the work." But it may also be true that by keeping the same folks at the helm, others feel less wanted. Make sure your volunteers know they are supported if they choose to shift areas of interest or take breaks from the world of volunteering with your ministry.

A vital volunteer program can significantly strengthen your organization and provide substantial benefits to the volunteers and all members of the community IF it is designed and managed effectively. Those who volunteer live longer, happier, healthier lives, and your institution can provide those benefits. Add to that the incredible power, force and impact that Catholic organizations offer, and it is a profoundly rewarding experience. ☀

CBS names two recipients for Brother William Walz Scholarship

Thanks to a robust scholarship fund, for the first time in its history, Christian Brothers Services awarded two Lewis University students with a Brother William L. Walz, FSC Endowed Scholarship for the 2022-2023 academic school year.



In 2010, Christian Brothers Services established the scholarship in memory of Brother William L. Walz, FSC (1941-2010), honoring him for his years of service and dedication to 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.

Typically, one scholarship is awarded per year. However, the strength of the endowment, now in its 11th year, has been increasing steadily, allowing for the opportunity to help two students, Jack Blitstein and Wefqui Odeh, both in their final year of school at Lewis University, located in Romeoville, IL.

CBS holds long-standing ties with Lewis University, where the company was located for many years, as well as the strong relationship Brother William maintained with the school. Brother William received his MBA from Lewis University and served as its bursar for four years before being named president/CEO of CBS.

The award is purposefully given during the latter part of a student's career, which is seen as an extra incentive to assist a student finish their schooling without financial constraint and recognition of their ongoing dedication.

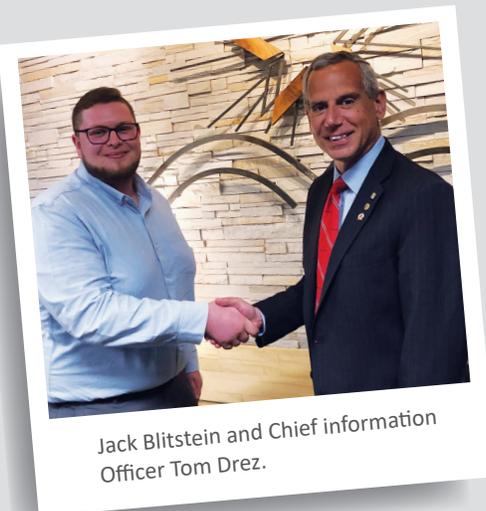
"Christian Brothers Services is steeped in the Lasallian mission, striving to continue the educational mission of St. John Baptist de La Salle—investing in students through scholarship is one way we can both honor Brother William Walz and continue to fulfill the mission our company is built on," said Brother Michael Quirk, FSC, Ed.D., President and CEO of Christian Brothers Services. "Congratulations to these students who show not only a passion to excel but who share a commitment to service."

Blitstein and Odeh, both from the Orland/Tinley Park, IL area, also share a similar drive for excellence, both holding a near 4.0 GPA, while maintaining leadership roles in extracurricular areas and a genuine desire to give back to the community after graduation.

Blitstein, an accounting major, serves as the student ambassador of the Illinois CPA Society, a member of the Accounting Club, and vice president of the Economics & Finance Investment Club, a role taken seriously and one in which he helped earn a 38% return on the club's investments this past year. He credits Lewis University with giving him such hands on experience that other schools could unlikely match.

When asked to reflect on what leadership means, Blitstein holds the belief that, in part, a leader is one who makes people feel welcomed and one who helps others towards a better vision. Though overcoming his own obstacles along the way, he used his own connections and accounting knowledge to help others study for the CPA exam and develop a passion to follow their dreams, making him well on his way to being the leader he envisions.

"I have learned the value of hard work and dedication," said Blitstein. "On the flip side, I have learned that no matter how hard you work, obstacles still occur. You can't let these obstacles get you down, or stop you from achieving your goals...Obstacles are inevitable and you have to continue to live your life...I hope to instill this ideology into as many people as possible."



Jack Blitstein and Chief information Officer Tom Drez.

Continued on page 27

Veteran Christian Brothers Services employees Jim Ceplecha and Pamela Mott recently earned the highest and rarest recognition given globally by the Brothers of the Christian Schools and granted by the Superior General in Rome.



Christian Brothers Services Employees receive affiliation

Acknowledging more than 40 years of dedication to the Lasallian mission, the pair were presented with the letters of affiliation in a recent ceremony. By affiliation, men and women, lay, religious and members of the clergy, are recognized as members of the Institute of the Brothers of the Christian Schools for their great personal sacrifice. Affiliated members have participated to an extraordinary degree in the life and work of the De La Salle Christian Brothers, and their founder, St. John Baptist de La Salle. As affiliated members, they are invited to share more fully in the Lasallian charism.

"They may be thinking, 'why me?' If you look back over the years, each day you have listened to God's call and have responded generously, gradually, faithfully, wholeheartedly, joyfully and in a remarkably impactful way through the guidance of the Holy Spirit," Brother James Gaffney, FSC, President Emeritus, Lewis University, told them during the ceremony. "It is summed up best by Brother Michael, that in the past many years, through various goals and multiple responsibilities within the Lasallian family, Pamela and Jim, you have been increasingly one *with* us. Today, you are joyously, one *of* us."

Gaffney explained the affiliation ceremony underscored that this remarkable ministry is not limited in its Lasallian character to the high schools and elementary schools, universities, and retreat centers, "but also to institutions like Christian Brothers Services, in large part to the authentic and Lasallian vision and leadership in persons like Pamela Mott and Jim Ceplecha."

"As Brothers, as affiliates, as Lasallians, we deepen our vocational identity by striving to respect and respond to the call of God. We reimagine our way of life in order to be incredible witnesses to those most in need. So congratulations and high praise to our new affiliates for really being very caring and incredible witnesses to our Lord Jesus Christ," said Gaffney.

Brother Michael Quirk, FSC, Ed.D, CBS President and CEO, reflected on the dedication of both Ceplecha and Mott, explaining that by being affiliated, they are being asked to become a daughter or son of Saint John Baptist de La Salle.

"The Brothers have invited them for affiliation because they have directly served the Lasallian mission over the course of their careers. Each person's association

spans nearly five decades. They will be remembered in daily prayer in Brother communities across the globe. May they know our deep appreciation."

Jim Ceplecha

From the start of his Catholic education at St. Joseph High School, in Westchester, IL, to acting as the longest serving lay colleague in the 60-year history of CBS, Ceplecha, now Director of Defined Contribution Plans at CBS, has demonstrated his commitment to the Lasallian mission time and time again.

Early on, Ceplecha unknowingly set the premise for what it means to be a Lasallian Volunteer. Before the formal volunteer program existed, right out of high school, he assisted his principal on a Lasallian mission serving those on St. Vincent island in the Caribbean. His commitment to St. Joseph's never has deterred, consistently serving as a donor to his alma mater, his concern for a student in need forever at the forefront.

AFSC



For 40 years, Jim has worked in various roles at CBS, diligently working to help its members secure retirement plans that would serve and protect their future, keeping their best interests at heart. He also serves the Diocese of Joliet, IL, as a member of the Diocesan Priests Pension Board. Furthermore, to expand the exploration of the Lasallian mission, Jim has been a faculty member of Lewis University's ELM (Exploring Lasallian Mission) workshop since its inception and coordinates a fundraising initiative and coat drive at CBS for the Catholic Charities of Joliet each and every year.

"Anyone who knows me, knows I do not like attention...but I want to note that it was the Brothers' teachings and the values they instilled in me that have guided me through life. I have had 40 glorious years at Christian Brothers Services for which I am grateful, and had many people standing beside me and representing me.

I appreciate this and am so very thankful to have received this honor," said Ceplecha in humble acceptance.

Pamela Mott

Woven within the Lasallian mission is the awareness of expressing one's spirituality, faith and zeal—all examples of how Pamela Mott not only lives life but encourages, molds, and creates opportunities for others to do as well.

For nearly 50 years, Mott has been seriously committed to advancing the Lasallian mission through her various leadership roles in Human Resources at both Lewis University and CBS and in her position as a board director for La Salle Manor Retreat Center in Plano, IL. While working full time at Lewis University, she earned her undergraduate degree and then embarked on a career that would span 32 years where she rose through the ranks, becoming the head of the university's Human

Resource and Personnel Office. She became instrumental in the development of mission-based hiring and mission orientation, first promoting the importance of addressing faith in a way that was welcoming to all while advancing the collective mission of the university.

She later joined CBS as its Chief Human Resources Officer, where she continued to develop the Lasallian formation of employees creating "CBS University," educating employees of the history and global mission of the Institute, connecting CBS' shared mission back to the Institute, capturing the essence of how CBS works to serve its ministries, fostering that relationship within its employees. Furthermore, Mott assisted in the institution of the Lewis University ELM (Exploring Lasallian Mission) for both senior management and the CBS Board of Directors.

She retired from her position in 2018, ending her entire working career of 47 years in Lasallian ministries. Her involvement continues as she serves as a trustee at Lewis University as a member of its Mission and Diversity Committee, and the boards of La Salle Manor, Easter Seals Joliet Region, and the Christian Brothers Employee Retirement Plan. Core to her work at the La Salle Manor Retreat Center, she was and remains a strong proponent of its mission to provide a life-changing experience in developing the younger generation.

"The Lasallian charism changed my life. It changed me. It changed who I am. ...I don't have words to adequately express what this means to me..." said Mott. "I thank all of you. I thank the De La Salle Christian Brothers. I am humbled to receive the letters of affiliation. You have touched the heart of a Southern Baptist girl." ☀

The letters "FSC," that follow a Brother's name, *Fratres Scholarum Christianarum*, translates to **Brothers of the Christian Schools**. The letters, **AFSC**, will now appear after the names of Ceplecha and Mott, the "A" standing for **Affiliation**.

Ceplecha and Mott were both presented with the same gifts a Brother would receive, a Bible, the Rules of the Brothers of the Christian Schools, a crucifix, and a six-decade rosary. With this rosary, the Brothers add a sixth decade, which was inspired by De La Salle, to honor the Immaculate Conception, to pray for the Church, the Pope, for good vocations, and for all Brothers living here and in heaven.

A Few Moments with ...

Doug McKenna

Doug McKenna, JD, MBA, will join the CBS senior management team as Managing Director of Risk and Claims Counsel, effective July 1. He will fill the void that will occur with the August 31 retirement of Managing Director of CBS Risk Management Services, Larry Baker. We asked Doug to talk about his plans for the Risk Management Services division and what he sees for the future.

How long have you worked at Christian Brothers Services and what positions have you held?

I have been with Christian Brothers Services for just over four years. In 2018, I started as Claims Counsel for the Risk Pooling Trust and then moved into the Director of Claims Service and Claims Counsel role in July 2019.

As Director of Claims Service and Claims Counsel, you managed all aspects of litigation involving the members of the Risk Pooling Trust. Will you continue on in this role in addition to your Managing Director duties?

One of the things I love about my position and being a lawyer is protecting our members. At present, I plan to keep the Claims Counsel title and continue to play an active role in handling our most high exposure cases to resolution through conventional negotiations and mediations.

In your new role as the Managing Director of Risk Management Services, what do you see as your biggest challenge?

I am very fortunate that both of my predecessors, Larry Baker and Diane Engstrom left this Division in excellent condition. Trust assets are at an all-time high; our Membership is stable and growing; our RMS team is capable and experienced, and our claim activity is well within acceptable levels.

Our biggest challenge is to generate reasonable and responsible Membership growth. Our Trustees are supportive of our efforts. Our Property/Casualty, Workers Compensation, and Loss Control programs are recognized as high quality offerings and these programs are essential to the success of the mission and ministry of our Membership. Nothing gets done within these ministries unless there is excellent asset and personnel protection available to our Members.

What is your goal for the division over the next few years?

I view it as my opportunity and responsibility to assist our team in growing our Member base through disciplined underwriting and sales activity. I want to work with the leadership of our other Trusts to cross-sell our services to make certain that we are seen as the "provider of choice" to our entire Membership.



In your view what makes Christian Brothers Risk Management Services different from other property/casualty insurance providers?

We seek a truly active collaboration with our Members. We seek to be their partners in mission. We want them to know that our interests are aligned with their ministries and mission.

At times in the Property/Casualty insurance world, it is possible that insurance carriers and their insureds' interests are not aligned. Often, it seems that some insurance carriers are looking for ways to avoid paying their insured's claim. The Risk Pooling Trust and Risk Management Services Division work tirelessly to provide security and support for our Members. We do not look for ways to avoid paying claims. Of course, we follow the law and precedent. Sometimes, there are claims that we just cannot cover. However, we have a bias toward finding coverage within our Plan Document, if possible.

We have seen how natural disasters have affected our members, especially in the last few years. If you could offer one piece of advice to our members about preparing for a natural disaster what would it be?

Be prepared and have a plan in place, but never be afraid to contact us at Christian Brothers Services. We are here to help and have been through it all before. We have the resources and people in place to serve you and help in any way possible.

What do you like to do in your spare time?

Being a father to two active boys, spare time is often hard to come by. I enjoy coaching both of them in youth lacrosse and occasionally finding the time to play a round of golf with them and my wife. When I need to get away from it all, I love the solitude of an early morning run and I am looking forward to completing my 20th marathon this fall. ☀

Continued from page 23.

Perseverance and determination often lay the path for leadership and success, a road taken by Odeh, who had to circumvent his own studies to help with his family business, thrust into leadership roles to fill in the gaps created by the pandemic. After slowly teaching himself computer programming and finding a new enthusiasm for such a career, he switched majors from pharmacy to computer science to shorten his time in school and carve a new path.

Bilingual in both English and Arabic, he is a member of the Muslim Student Association, and spent time helping to translate documents. He hopes to earn his degree in computer science and find a job in Information Technology related to the medical field.

"I specifically want to help those who are from foreign countries because I understand the struggles of coming to the United States and wanting a better

life and feeling that there is no one that wants to help you," said Odeh. "I will take my experience from Lewis and dedicate it to giving back to those in need."

The pair joins past Brother William L. Walz scholarship recipients Eric Grunst, Mauricio Lasso, Jan O'Hara, Olivia Major, Yesenia Gonzalez, Krystal Le, Marek Blizinski, Jason Giron, Ian Ziarko, Ryan O'Keefe, and Ross Goers.

Christian Brothers Services will award the next scholarships in the spring of 2023. ☀️

If you would like to make a tax-deductible donation payable to Lewis University, 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



Wefqui Odeh and Chief Information Officer Tom Drez.

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