



National Religious Retirement Office



Planning & Implementation Assistance



*I know well the plans I have in mind for you... plans for a future full of hope.
Jeremiah 29:11*

2009 Participants & Consultants



Augustinian Friars, Olympia Fields, IL
Benedictine Sisters, Pittsburgh, PA
Carmelite Friars, Milwaukee, WI
Handmaids of the Sacred Heart of Jesus, Wyncote, PA
School Sisters of St. Francis & School Sisters of Notre Dame, Milwaukee, WI (Collaborative Project)
Sister Servants of the Blessed Sacrament, Bonita, CA
Sisters of Charity of St. Elizabeth, Convent Station, NJ
Sisters of Social Service, Encino, CA
Sisters of St. Dominic, Caldwell, NJ
Sisters of St. Joseph, Baden, PA

Sr. Jeanne Bessette, OSF	Sr. Paula Cooney, IHM
Sr. Margaret Mary Cosgrove, BVM	Sr. Lorelle Elcock, OP
Rev. Kenan Freson, OFM	Sr. Kathleen Kalinowski, OSB
Mrs. Catherine Keevey	Sr. Rita Kraemer, OSF
Sr. Julia Lanigan, GNSH	Sr. Hertha Longo, CSA
Mr. Ray Mattes, IHM	Rev. Joe Morrissey, OSFS
Sr. Ann Margaret O'Hara, SP	Mr. Neal Smith
Sr. Maryann Summa, OP	Sr. Mary Swain, SL
Sr. Meg Sweeney, OP	Mr. Matt Wade
Sr. Joan Winkler, OSF	Sr. Barbara Ann Winnals, SSJ

"The process helped us address a pressing need for our province."

The Augustinians

"Our consultants have kept us on task, been responsive to our queries, and are willing to share their experiences."

Sisters of St. Dominic

"The workshop helped us focus our plans and get more realistic about all we had to do."

School Sisters of St. Francis

"The workshop intensified our conviction that we must lay down some real plans for the future."

Discalced Carmelite Friars

"In the former system we worked with a community for 3 days, wrote a report and our job was done. Now we continue to partner with the community along the way. It's much more holistic."

Sr. Maryann Summa, OP

NRRO Planning & Implementation Assistance



A goal of NRRO is to help religious institutes realistically assess their retirement realities and implement a plan for adequate care of the elder members. Annual Direct Care Assistance has averaged \$500 to \$700 per member age 70 or older. While religious institutes report these funds are extremely helpful, with the average cost of care exceeding \$35,000 per person, it is obvious that these funds are not the entire solution.

NRRO has created a process to assist religious institutes in developing a plan to decrease their retirement shortfall. It is designed to work with active (not contemplative) institutes over 50% unfunded for their past service liability



First Steps

After receiving the initial application, a NRRO staff member visits the planning team of the institute—the major superior, treasurer, and retirement director- to get a better understanding of their needs. NRRO then assigns two consultants to conduct a 2—3 day on-site visit and to work with the planning team throughout the process.



The planning team and two consultants will attend a workshop hosted by NRRO (travel and lodging expenses are covered).

Normally, five institutes' teams and consultants attend. Participants engage in presentations relative to the planning process. Time is given for teams and consultants to finalize key elements for their planning process.

Follow Through

In monthly conference calls, the planning team and consultants work to identify the types of assistance needed to develop a plan. Once this is done, the institute submits an Application for Planning Assistance to NRRO for up to \$25,000.

After working to develop an actual plan to reduce their unfunded past service liability, the team then submits an Application for Implementation Assistance to NRRO for up to \$250,000 to assist in implementing the plan.



Review Process

Applications for planning and implementation assistance are submitted to the NRRO Review Board and Management Board for approval. Consultants and NRRO staff work with the institutes' planning teams to try to ensure that funding guidelines are followed. Participation in the process does not guarantee funding.

Dates for Upcoming Planning Workshops

January 22-24, 2010

April 20-22, 2010

September 21-23, 2010

January 21-23, 2011

April 5-7, 2011

Location determined based on participants

Please contact our office if you have any questions

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How to Get Started

The Application to Participate in the Planning and Implementation Process and a more detailed explanation of the process can be found on the NRRO website at:

<http://www.usccb.org/nrro/planning.shtml>