

Retirement Fund for Religious

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News

Elder-Care Consultations: A Look Inside

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Of the many tools and services provided by the National Religious Retirement Office (NRRO), elder-care consultations may be one of the most effective yet little-known resources. Performed by two NRRO-trained consultants, these on-site visits allow a religious community to assess the cost and quality of elder-care delivery and to evaluate long-term retirement needs and available funding.

In March, the Franciscan Sisters of the Sacred Heart (FSSH) of Frankfort, Illinois, participated in an elder-care consultation to help them determine both the future of their motherhouse and viable options for providing a continuum of care for senior members. The community's motherhouse, which was renovated in 2001, is a bright and airy facility with wide hallways, handicap-accessible bedrooms and bathrooms, and a beautiful chapel that can easily accommodate wheelchairs and walkers. At the motherhouse, the community is able to provide care and housing for well elders and for those who need assistance, either with basic services or with some activities of daily living. Although the facility includes an infirmary, sisters requiring long-term skilled or memory care reside at external facilities.

The FSSHs have eighty members and have been serving in Illinois since 1876. They engage in a wide range of ministries, from education to foreign missions. They also

sponsor St. Anne's, a Los Angeles social service agency, and are one of five sponsors of Presence Health, the largest Catholic health-care system in Illinois. Other sponsored ministries include a prayer and retreat center and a holistic center, both located on the motherhouse campus. Decisions regarding elder-care delivery will impact the future of these ministries.

Follow along as we outline the steps of a typical elder-care consultation and document the FSSH's experience.



The FSSHs undertook the elder-care consultation to assure the best quality of life for senior members. Pictured, *from left*: Sister Anna Clare Meyer, Sister Marcellita Weller, and Sister Mary Peter Gartman.

Elder-Care Consultations: A Look Inside, continued

1
Elder-care consultants begin the on-site visit by meeting with designated community representatives.

Meet the Consultants



Sister Hertha Longo, CSA, *left*, and Diane Gucciardo.

Learn more about them and why they do what they do on page 6.



Consultants Sister Hertha Longo, CSA, and Diane Gucciardo opened the evaluation by meeting with the FSSH Elder Care Study lead team. Together they established objectives for the visit and reviewed the chief concerns. Although the community is financially stable, the FSSHs recognized that they could not sustain their existing model of elder care for the long term. They hoped the consultation would enable them to begin to address their most pressing issues, including:

1) the future of the motherhouse campus and the sponsored ministries housed there, 2) options for providing a full continuum of care, and 3) an assessment of their current elder-care delivery and suggestions for ways to enhance the quality of life for senior members.

Pictured, *standing from left*: Sister Judith Plumb, Sister Norma Janssen, Sister Mary Shinnick, Diane Gucciardo, and Sister Kathleen Hook; *seated from left*: Sister Hertha Longo and Sister Mary Mark Segvich.

Elder-Care Consultations: A Look Inside, continued

2

Consultants review and analyze the religious community's demographics, financial data, ministries, and retirement policies.



During the visit, Diane and Sister Hertha met with General Community Leader Sister Judith Plumb and with other members of the leadership team to gain a better understanding of the community's finances, census projections, and planning efforts. The elder-care consultation was an action item from the FSSH's recently completed long-range plan, which was presented to the entire congregation in August 2012.

Diane reviewed the community's retirement and elder-care guidelines with Sister Mary Mark Segvich, retirement program director and coordinator for the senior sisters' health care. They also discussed ideas for senior programming and ongoing pastoral care.

3

The consultation includes a tour and assessment of the physical plant.



Sister Hertha and Diane toured the motherhouse with Facilities Manager Michael O'Donnell. The tour allowed them to evaluate the physical environment and to gain a sense of the scope of resources. In addition to senior housing, the motherhouse furnishes space for the community's administrative offices and archives. One wing is also leased to Presence Health as office space. Overall, however, the facility is underutilized.

Elder-Care Consultations: A Look Inside, continued

4

Input from residents and staff is an important component of the process.



Sister Hertha and Diane chatted with motherhouse resident Sister Mary Peter Gartman. During the consultation, they gathered the sisters' feedback on everything from recreational programming to their satisfaction with meal delivery and health-care services. The consultants found that, as much as senior members appreciate the comfort and security of the facility, their main concern is for everyone to be together. They are more attached to each other than to the motherhouse.

Certified Nursing Assistant Sharon Raimondi spoke with Sister Hertha. Consultants met with lay staff members to gain a better understanding of the day-to-day care of residents and to explore areas in which staff members may benefit from additional training and education.

5

Consultants compile their findings.



Having assimilated the information they gathered, Sister Hertha and Diane drafted a preliminary assessment that summarized the community's major strengths and challenges. Their evaluation addressed elder-care delivery, retirement planning, overall operations, plant and property, and senior programming.

Elder-Care Consultations: A Look Inside, continued

6 Consultants present their initial findings at the close of the on-site visit. A final report is sent afterward with the full evaluation and with recommendations for the future.



“We were thrilled with the consultants’ evaluation, both in their commendations of the actions we have already taken and in their recommendations for what we can do in the future. Every chance I get, I tell other major superiors that they should take advantage of the NRRO’s elder-care consultation.”

Sister Judith Plumb, OSF
General Community Leader

At the conclusion of the on-site visit, Sister Hertha and Diane shared their findings with the Elder Care Study lead team and discussed their observations and recommendations. Shortly afterward, they sent a final report to the FSSHs and to the NRRO. Since receiving the report, the community has continued to work on both long-term and short-term retirement goals. They have visited other facilities and are gathering details on alternative care models. This information will be presented to a new leadership team, who will be

installed following the community’s general chapter meeting in the spring of 2014. The FSSHs have also begun to implement some of the short-term recommendations offered in the consultants’ evaluation, such as hiring a part-time provider for pastoral care. Overall, they feel the consultation offered valuable ideas and strategies for addressing the future use of their motherhouse and for identifying viable options for providing a full continuum of elder care.

Meet the Consultants

Sister Hertha Longo, CSA, has been consulting for the NRRO for more than twenty years. A registered nurse, she has a clinical background as well as extensive experience with long-range financial planning and forecasting. Since 1992, she has been the treasurer of her own religious community, the Congregation of St. Agnes in Fond du Lac, Wisconsin, and she is a former president of both the National Association of Treasurers of Religious Institutes (NATRI) and the Resource Center for Religious Institutes (RCRI). She remains a member of the RCRI Board of Directors and also serves on various advisory boards.



Sister Hertha holds an MBA from Fordham University and a PhD in Economics from Notre Dame University. It was actually the dissertation for her PhD that led her to get involved as an NRRO consultant. During her research, which analyzed nursing-home costs, she discovered that many religious communities were using models of care that were not financially sustainable for the long term. Sister Hertha began consulting for the NRRO and NATRI in order to help religious communities analyze their costs and evaluate the impact of these costs on the future viability of their congregations. “Because I am a nurse, I am very interested in the quality of care as well as the costs,” said Sister Hertha. “And high cost does not always translate into high-quality care. It is gratifying when we work with a religious community and see them implement new models where care is better, but costs are lower.”

Diane Gucciardo has been an elder-care consultant for the NRRO for two years. She holds an MBA from the University of Connecticut, is a licensed nursing home administrator, and has worked extensively in various facets of the elder-care continuum. She also has many years of management experience in the hospitality industry. Since 2005, she has served as the administrator of Lourdes Health Care Center in Wilton, Connecticut. Consistently ranked by U.S. News and World Report as one of the top nursing homes in the country, Lourdes is



a forty-bed, skilled-care facility sponsored by the School Sisters of Notre Dame, Atlantic-Midwest Province and serving women religious.

The School Sisters of Notre Dame (SSND) have been extremely supportive of Diane’s service as an elder-care consultant. In fact, she was encouraged to become one by Sister Grace Sciamanna, SSND, who is also an NRRO consultant and thought Diane would be a good fit. The SSNDs value the contributions that Diane makes and feel her off-site consultations offer learning opportunities that enrich her work at Lourdes. “I feel good that I can use my experience and practical knowledge to give back and help another community,” said Diane.

Diane also appreciates the spirit of service displayed by the other consultants. “When I was at the NRRO training workshop for new consultants, I was impressed by how open and helpful everyone was,” said Diane. “They were so accomplished and intelligent but without ego. They just wanted to help.”

Interested in an elder-care consultation?

Elder-care consultations are available for a modest fee or, based on need, may be funded by Management and Continuing Education Assistance. To learn more or to download an application, visit www.usccb.org/nrro and click on “Resources.”

NRRO Calendar

November 2013

19 NRRO Webinar—
Engaging Aging: Blessing or Burden

December

7–8 Retirement Fund for Religious national collection

9–12 CMSM New Leaders Workshop, Washington, DC

January

2 Direct Care Assistance applications mailed

31 NRRO Planning and Implementation Workshop
San Antonio, TX
(through February 2)

Message from the Executive Director

On December 7–8, parishes across the country will hold the annual collection for the Retirement Fund for Religious (RFR). These dates loom large in our office—not only because we’ve spent a year preparing for them—but more importantly because what happens that weekend largely determines the amount and types of assistance we will be able to furnish.

As a result of the 2012 collection, we were able to distribute \$23 million to 440 religious communities, funding that helps provide for the day-to-day care of thousands of elder sisters, brothers, and religious order priests. An additional \$3.6 million was allocated to religious communities with the greatest needs and to promote education in retirement and elder-care delivery. Even religious communities that do not receive financial assistance still benefit from the annual appeal through the resources and programming we are able to offer. The Franciscan Sisters of the Sacred Heart, highlighted in our feature story, do not receive funding. Yet, thanks to the annual collection and the generous service of our consultants, we were able to provide their elder-care consultation at minimal cost to the community.

Understandably then, when the national collection weekend arrives, we redouble our prayers, asking God to bless our efforts on behalf of senior religious. And God does not disappoint! Year after year, I am overwhelmed by the outpouring of love and generosity toward our

senior religious. Many of the contributions that arrive in our office are accompanied by heartfelt letters detailing the tremendous impact religious have had in the lives of our donors. Equally moving are the sacrifices of donors who support the collection even when their own resources are limited.

It is fitting that our annual collection takes place during Advent, the season of light. For me, the light of Jesus shines brightly in the lives of service offered by our senior religious and in the love and generosity of our donors. As our national collection date approaches, please join me in prayers for this year’s appeal and in thanksgiving for the tremendous blessings already received.

Gratefully,

Sister Janice Bader, CPPS



Announcements and Reminders

Stay Connected

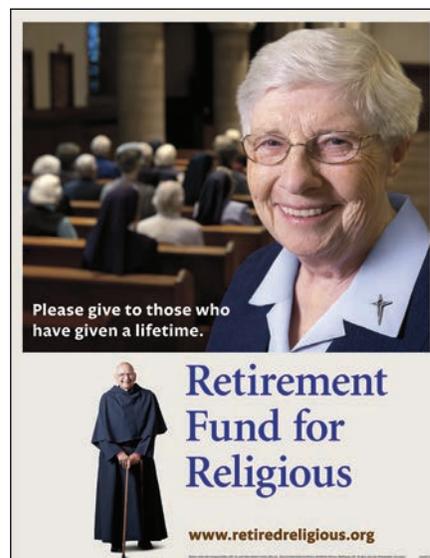
Please send changes in address, phone, e-mail, or congregational leadership to the NRRO, c/o Tiffany Lezama (tlezama@usccb.org), so that we may keep our records and mailing lists updated.

Bequests

If you would like to make a bequest or restricted gift to the National Religious Retirement Office, please use the following language:

To the United States Conference of Catholic Bishops Incorporated for the exclusive purpose of assisting Roman Catholic religious orders in the United States to provide for the retirement needs of their elderly members.

Retirement Fund for Religious National Collection December 7-8



The 2013 poster features Sister John Margaret Walsh, a member of the Congregation of Divine Providence of Melbourne, Kentucky. Financial and consultative assistance, made possible by the annual RFR collection, helped her community to address a myriad of challenges and to greatly improve their long-term retirement outlook.

Also pictured:
Father Ronald Turcich, OSA.



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The National Religious Retirement Office coordinates the national collection for the Retirement Fund for Religious and distributes these funds to eligible religious institutes for their retirement needs. Our mission is to support, educate, and assist religious institutes in the U.S. to embrace their current retirement realities and to plan for the future.

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