

Retirement Fund for Religious

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News

From Vision to Reality

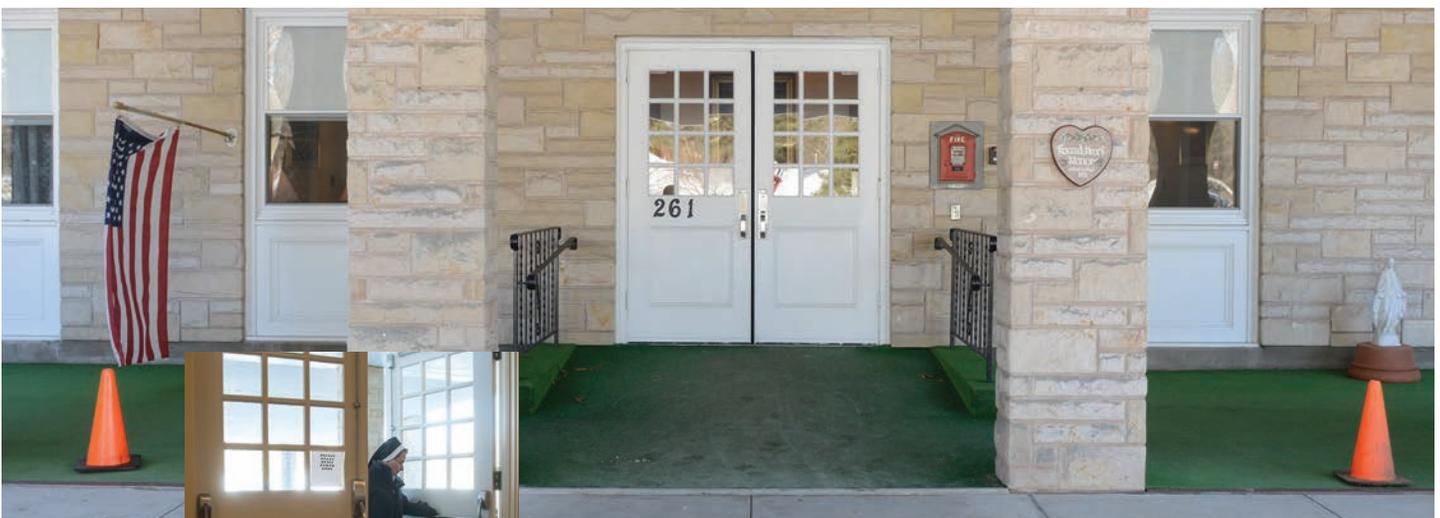
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Planning and Implementation Assistance was designed by the National Religious Retirement Office (NRRO) to be a twelve- to eighteen-month process, during which a religious community identifies its greatest retirement-funding challenges and develops a plan to address them. But finding a solution is only the beginning of the journey; implementing the solution requires time, energy, and a continued commitment to the vision developed during the planning phase. Often the vision and solution are created by one leadership team and realized by another.

The Apostles of the Sacred Heart of Jesus of Hamden, Connecticut, entered Planning and Implementation Assistance because the cost of operating their retirement facility was generating a significant deficit between income and expenses. They also needed to determine how best to allocate the space in their facility, parts of which were underutilized, to accommodate current and future census projections.

The community's retirement home, Sacred Heart Manor, was built in 1976 and is licensed for assisted living. The forty-bed facility is staffed by a team of nurses and certified nursing assistants, including three sisters who are registered nurses. Elder



Through participation in Planning and Implementation Assistance, the Apostles of the Sacred Heart of Jesus have developed a strategy to defray eldercare costs and renovate their retirement facility. *Above and left:* Automatic doors and an enclosure with security cameras will replace manual doors at the main entrance. *Left:* Sister Ann Maria Sforza.

From Vision to Reality

Creating the Vision

The ASCJ team attended a planning workshop with their NRRO consultants in January 2011. *From left (seated):* Sister Sarah Bertler, OSF, NRRO consultant; Sister Maureen Martin, ASCJ, former provincial superior; *(standing)* Sister Mary Anne Sharron, ASCJ, former retirement director; Sister Barbara Winnals, SSJ, NRRO consultant; and Sister Anne D'Alessio, former treasurer.



sisters living at the Manor are designated as Apostle Adorers for their extra devotion to the ministry of prayer. Some receive skilled care while others require only basic support for the activities of daily living.

In January 2011, the former superior, retirement director, and treasurer—Sisters Maureen Martin, Mary Anne Sharron, and Anne D'Alessio—attended the initial planning workshop. With the support of NRRO volunteer consultants, this team then spent the next two years assessing the community's long-term finances and evaluating potential solutions to their retirement challenges. A 2012 Planning Award of \$69,495 underwrote various research and analyses, including a certified financial audit, a feasibility study for buying into Social Security, a market study of area senior housing, and the hiring of a development consultant. While buying into Social Security was found to be cost prohibitive, the Apostles learned a solution involving senior housing might offer the additional revenue they needed.

About the Apostles

The Apostles of the Sacred Heart of Jesus are an international religious community founded in Italy in 1894. The U.S. Province is headquartered in Hamden, Connecticut, and has 127 members, including eleven in various stages of formation. Sisters serve in five states, and the community sponsors several ministries, including two high schools and a residential and vocational facility for children and adults with special needs. The community also operates a mission in Taiwan in the Republic of China.

Related to senior housing was the option to become licensed as a Residential Care Home (RCH) by the State of Connecticut. RCH facilities provide a room, meals, and support but not nursing care for well-elderly adults. The state furnishes a daily, per person allowance for this type of housing, and many of the community's sisters would qualify for this subsidy. Moreover, since Sacred

Heart Manor functions as an assisted living facility, the additional expense of operating as an RCH would be minimal. The potential income, on the other hand, could be quite significant. In order to move forward, renovations would be necessary to bring the facility into compliance with RCH guidelines and to ensure the safety and well-being of the sisters.

In the spring of 2013, the Apostles received \$500,000 in Implementation Assistance to initiate renovations, and, in July, a new congregational leadership team was installed. Led by Provincial Superior Sister Anne Walsh, the team continues to pursue the goals identified during the planning process. Renovation of Sacred Heart

From Vision to Reality



Implementing the Plan

The new provincial team, installed in 2013, reviews plans for the renovation of Sacred Heart Manor. *Clockwise from left:* Sister Maureen Flynn, provincial treasurer; Sister Lisa Retort, provincial secretary; Sister Linda Pettinella, vice provincial and councilor; Sister Anne Walsh, provincial superior (*seated*), and Sister Virginia Herbers, councilor.

Manor, which began in June 2014 and is anticipated to conclude in March 2015, is proceeding in four phases. Highlights include a new, secure main entrance for the building with safety cameras and automated doors. The skilled and dementia care wing will also receive a secure entry. New carpet, paint, lighting, and a new sprinkler system are being installed, and bathrooms are being made handicap accessible.

Many of the updates reflect the Apostles' person-centered approach to eldercare. The facility's community rooms are being refurbished to make them more homelike and senior-friendly, and the entire building is being wired for Internet access. In addition, community rooms will be tailored to the needs and activities of the residents, with one room outfitted for sisters with physical challenges and memory loss and one for well elders.

Originally, the congregation discussed making space available to area seniors, but further investigation revealed that the accommodations they could offer would not meet the needs and expectations of lay seniors. Additionally, the Apostles anticipate having the rooms designated for RCH to be fully occupied within the next eighteen months, as some members who are currently

missioned in community apostolates retire. Although census projections indicate that the RCH rooms will be filled by their own sisters for the next several years, the rooms could be offered to senior religious from other congregations, as space permits.

Initial approval for the RCH license has already been granted by Connecticut's Department of Social Service, and the community is working to complete the remaining requirements outlined by the state's



Novices make daily visits to Sacred Heart Manor, time that is beneficial both to senior sisters and to them. "There is such a strong sense of being loved," says Sister Elizabeth Doyle. "I can imagine how it must have felt to be their students." *From left:* Sister Electa LaGrutta, 86, Sister Elizabeth Doyle, and Sister Christina Skelley.

From Vision to Reality

Department of Public Health. Once approved, they will be informed of the daily subsidy they can expect per resident. This income is anticipated to significantly reduce the gap in operating expenses.

The Apostles' new policy on aging will help ensure that each sister who comes to the Manor has a personalized plan for transitioning from active ministry to retirement. With a preschool and adult day center located on the lower level of Sacred Heart Manor, not to mention the community's high school and spirituality center on the same campus, elder sisters will continue to have numerous opportunities for volunteer ministry.

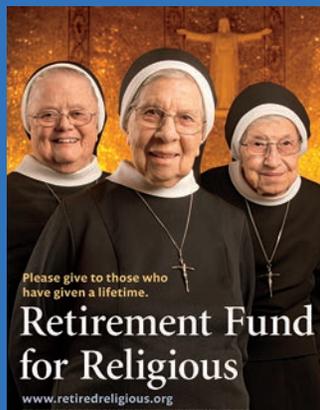
Like all projects, there have been challenges along the way, not the least of which has been that senior sisters have to be relocated as different areas of the Manor are renovated. Yet the Apostles remain focused on the future. "We feel like we have a clearer direction now," said Sister Anne. "I am grateful to the NRRO for enabling us to feel more secure as we move into the future."



Sister Anne Walsh

Retirement Fund for Religious National Collection: December 13-14

Members of the Apostles of the Sacred Heart of Jesus are featured on this year's campaign materials. *From left:* Sister Elizabeth Mary Knight, 79; Sister Carolyn Capobianco, 99; and Sister Bridget Esposito, who recently passed away at the age of 96. We know Sister Bridget will continue to bless us from heaven as she did on earth.



Developing Security

Although the funding from the RCH license is projected to cover the gap in spending, the Apostles are committed to safeguarding their financial future in other ways. Through their initial Planning Award, the community engaged a development consultant to help them expand and enhance their mission advancement program. Their efforts over the last three years have enabled them to identify and secure additional funding. For example, they applied for and received a grant from Support Our Aging Religious (SOAR!) to pay for bathroom renovations on five of the RCH rooms. In addition, they have nearly completed A Manor Chapel Appeal, an initiative to undertake needed renovations of the chapel at Sacred Heart Manor.

The Apostles are also one of thirteen religious communities selected for "Advancing Mission: Women Religious in the 21st Century," a fundraising and mission advancement program developed by Indiana University's Lilly Family School of Philanthropy and funded by grants from the Conrad N. Hilton Foundation and the GHR Foundation. As part of their participation in this program, more than a dozen sisters are training to be Apostle Ambassadors and will soon start making development visits on behalf of the congregation.

"Our focus on fundraising is important, both to help support retirement and for the education and formation of our younger sisters," said Sister Anne.



Sacred Heart Manor Chapel

Message from the Executive Director

Advent is always a highly anticipated season in our Church. For women and men religious, it is especially so this year as the First Sunday of Advent marks the beginning of the Year of Consecrated Life. Pope Francis proclaimed this special year and called on consecrated women and men to—in his now famous words—“wake up the world”¹ with their Christian witness.

As I look to the year ahead and consider the ways I might answer the Pope’s call, I find my inspiration in the lives of our senior religious and their wonderful example of “waking up the world” by making God’s presence tangible—touchable—on earth.

Our office receives countless letters from individuals expressing gratitude for all that senior religious did and do. Yet, it is not their works alone that fill us with a sense of God’s presence. Rather, it is, as Sister Elizabeth describes in our feature article, that strong feeling of being loved (*see lower photo, page 3*). And this love—God’s love—was and is manifest to us in multiplication tables on the blackboard and the listening ear of a trusted counselor, in the warm cup of soup for a hungry person and the hand that comforts the sick, and in the countless prayers that each of us might come to know and love God as they do.

During the Year of Consecrated Life, Pope Francis also calls on the faithful to express their thanks for the lives of consecrated religious. In our country, Catholics

have been doing this for the last twenty-six years through donations to the Retirement Fund for Religious. As the national collection approaches in December, we ask for and rely on continued generosity. My thankfulness for this support is joined with the prayers—and love—of some 35,000 senior sisters, brothers, and religious order priests who benefit from the annual collection. Thanks be to God for all who give to those who have given a lifetime.



Gratefully,

Sister Janice Bader, CPPS

¹Antonio Spadaro, S.J., “Wake up the World’: Conversations with Pope Francis About the Religious Life,” *La Civiltà Cattolica*, http://www.laciviltacattolica.it/articoli_download/extra/Wake_up_the_world.pdf, p.3, (accessed 11/3/14).

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.

NRRO Calendar

November 2014

17–20 CMSM New Leaders’ Workshop, Washington, DC

18 NRRO Webinar—*Preparing for Close Encounters of the Healthcare Kind*

December

13–14 Retirement Fund for Religious National Collection

January 2015

2 Direct Care Applications sent via hard copy and e-mail.

15 NRRO Assistance Review Committee Meeting

20 NRRO Management Committee Meeting

27–29 NRRO Planning and Implementation Workshop, San Antonio, TX

March

18–22 LCWR New Leaders’ Workshop, Mundelein, IL

31 Direct Care Assistance applications due.



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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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