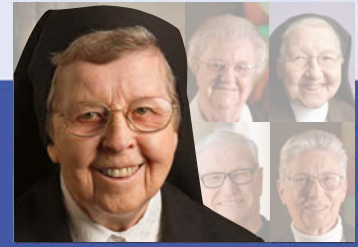


Retirement Fund for Religious

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News

Slow and Steady: How the Guadalupanas Won the Race

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Addressing retirement-funding challenges is a marathon, not a sprint. The National Religious Retirement Office (NRRO) estimates that religious institutes involved in Planning and Implementation (P and I) Assistance will spend roughly 12–24 months identifying their most pressing issues and developing plans to address them. Implementing these strategies can require time and effort that extends well past P and I participation. And, as the Missionaries Guadalupanas of the Holy Spirit learned, doing everything right in terms of planning does not guarantee a smooth road to project completion. Navigating potholes is part of the journey.

Based in Los Angeles, California, the Missionaries Guadalupanas of the Holy Spirit have 44 members and serve in multiple states and the Dominican Republic. When they began the P and I process in April 2011, they had a median age of 63 and limited eldercare needs. Yet they were proactive in preparing for the future. Previous Management and Continuing Education Assistance awards from the NRRO had provided financial education and training that enabled the community to strengthen their financial portfolio. Likewise, an NRRO Eldercare Consultation had prompted efforts to develop a comprehensive retirement and eldercare strategy.



Cross of the Missionaries Guadalupanas

Right: Participation in Planning and Implementation Assistance enabled the Missionaries Guadalupanas of the Holy Spirit to transform their outdated provincial headquarters into a space where sisters young and old can live, pray, and minister in community.



Slow and Steady: How the Guadalupanas Won the Race, continued

Upon entering P and I, the community quickly identified their primary challenges as (1) determining the best location for senior housing and (2) generating additional financial resources to underwrite retirement needs while sustaining vital ministries.

The community's vision was to provide centralized, senior-friendly retirement housing for elder members who were physically and mentally healthy but would benefit from basic services. Previously, older sisters had aged in place at local convents, with younger members providing support as needed. Centralized housing would allow elder sisters to live in community while reducing costs and administrative time. In fact, a single retirement residence was projected to produce a roughly \$1.5 million savings over 10 years.

The existing provincial facility, which also housed the community's novitiate, was built in 1930. A November 2011 planning grant provided funding for a structural assessment of the building. Findings revealed it would be more cost efficient to renovate their existing and underutilized facility than to undertake new construction. In 2013, an implementation award enabled the Guadalupanas to hire a firm to develop architectural

renderings for the space and initiate the remodeling. With the first set of plans in place, the community anticipated completing the project by the spring of 2014. But that was not to be.

Delays

The community's original plan was to add a two-story addition for elder housing. However, issues with the aging building required the development of a second set of plans—and a third and a fourth. Various difficulties with city ordinances caused further delays. Ultimately, construction did not begin until June 2015. As is often the case with renovating older buildings, fixing one issue lead to the identification of others. Although the community had planned only to add senior housing, they determined it would be most cost-effective to update the novitiate area and provincial offices at the same time.

Developing a Future

In conjunction with the senior-housing efforts, the Guadalupanas recognized the need to bolster income, both to meet ongoing retirement needs and to sustain ministries in support of their missionary charism. An April 2013 planning award provided financial assistance for a second feasibility study to assess the possibility of

launching comprehensive fund-raising efforts.

Later that same year, implementation funding underwrote training for



Left: Shown during demolition in 2015, the community's provincial house was built in 1930. It needed to be expanded and renovated to provide elder-friendly space for senior members.

Slow and Steady: How the Guadalupanas Won the Race, continued

Sister Marta L. Tobón, the community's first development director. It also allowed the community to contract with consultants who provided a framework for establishing a development office.

The construction delays prompted Sister Marta to work toward building the community's base of annual support while identifying additional funding to help underwrite renovation costs. She procured donated graphic design and print services for

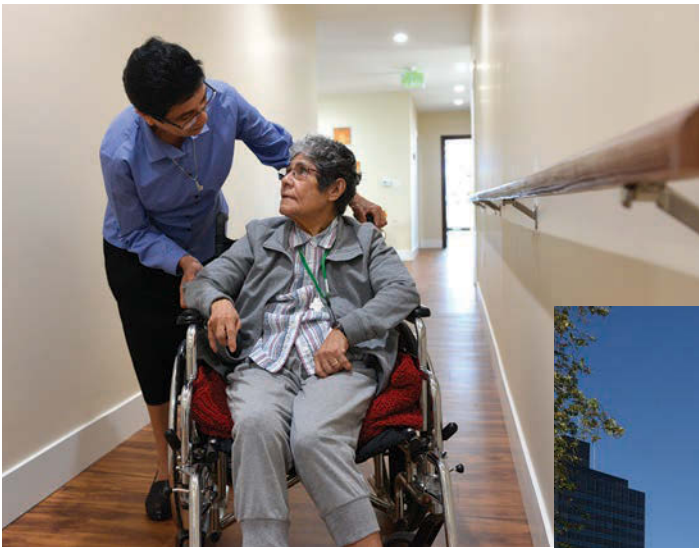


Right: Sister Marta L. Tobón (standing) and Mrs. Ana Castillo initiated the community's first development office.

the creation of campaign materials and launched a brief appeal, known as the Miracle Campaign. The campaign garnered financial and in-kind support for the renovation, and it expanded the community's donor base. Additionally, the Guadalupanas received grants from Support Our Aging Religious (SOAR) to underwrite the purchase of hospital beds and the installation of a handicap-accessible ramp.

A Provincial Home

By December 2016, the Guadalupanas were able to host an open house to share their building's transformation. Named *Casa Rougier* in honor of Father Félix de Jesús Rougier, MSpS, the community's founder, the new senior-living space features wide hallways and elder-friendly bedrooms equipped with either private or semi-private, handicap-accessible bathrooms. Common areas include an exercise room, a community room, and a large kitchen/dining area. Although located in the heart of Los Angeles, several small balconies and a large patio offer ample areas to enjoy the outdoors. Renovations to the novitiate area include remodeled bedrooms and bathrooms and the addition of a large library/computer area. Updated provincial offices now house the community's new development efforts.



Above: A wide hallway connects bedrooms to the living area and chapel. Pictured: Sister Antonia López (left), local coordinator for the retirement community, and Sister Ernestina Hernández.

Right: The renovated provincial headquarters houses offices, the novitiate, and senior-living space.



Slow and Steady: How the Guadalupanas Won the Race, continued

The building facilitates easy interaction between retired and active members, and a modest but lovely chapel allows the entire community to pray together. As needed, elder sisters receive assistance with meals, housekeeping, transportation, and other basic activities. Each day, sisters working in the formation and provincial offices join with elder sisters for prayer and a meal. The community continues to work toward securing Medi-Cal, California's Medicaid program, to provide assistance with in-home services, outpatient medical equipment, and physical therapies. When care needs increase, the Guadalupanas have maintained an existing arrangement with a nearby nursing facility, where senior members are eligible for Medicaid beds. At present, they have one sister at this location, and she receives frequent visits to keep her connected to the community.

Although their P and I journey was bumpy at times, the Guadalupanas are grateful for their new provincial home. They continue to work on other aspects of the master plan they developed during the process. "We don't know where we would be without the NRRO," says provincial leader Sister Ana Gabriela Castro. "We can't say thank you enough!"



Above: Sister Maria Guadalupe Malvais (*center*) gets a knitting lesson from Sister Emilia Irene Lara (*left*) and Sister Beatriz Cortés.



"We don't know where we would be without the NRRO. We can't say thank you enough!"

Sister Ana Gabriela Castro,
provincial leader

A Philosophy of Aging (and More)

Rather than lamenting time lost to construction delays, the Guadalupanas used the extra months to address other aspects of retirement planning. Founded in Mexico in 1930, the community began ministering in the continental United States in 1964. The U.S. Province, however, was not canonically established until 2008, and the community had some catching up to do in terms of codifying provincial policies and guidelines.

Throughout their participation in Planning and Implementation Assistance, the community had

been working toward developing a philosophy of aging and an accompanying retirement policy. Their basic premise was that elder members should, as they desired and were able, age in place in local convents.

To help develop the new guidelines, the Guadalupanas requested retirement policies from three other religious communities. In so doing, they discovered a host of other areas to consider. At the time, the community had begun a three-year theological reflection on how their vows of poverty, chastity, and

obedience were reflected by their missionary charism and supported by their constitutions. They decided to address the various policy guidelines in conjunction with their vow reflections. The process has been an unexpected but welcome blessing for the community. "Creating the new policies has sometimes been difficult, but all the sisters embrace the wisdom behind the process," notes Sister Hilda Mateo, who facilitated the theological reflection. "They appreciate knowing what to expect."

Slow and Steady: How the Guadalupanas Won the Race, continued

“We think of this house as a place where our sisters go forth into mission and where they return when their years as missionaries are complete.”

Sister Hilda Mateo, renovation coordinator



Above: Members gather in the new community room. *Clockwise from left:* Sisters Emilia Irene Lara, Beatriz Cortés, Marta L. Tobón, Antonia López, Gloria Rodriguez, Elva Mendez, Ana Gabriela Castro, Maria Guadalupe Malvais, and Ernestina Hernández.



Left: Bedrooms in the senior-living section feature private or semi-private handicap accessible bathrooms and hospital-grade beds. *Pictured:* Sister Beatriz Cortés.

5 Things We Learned

“The construction process was a big learning curve for me. I was trained as a theologian, not an architect,”

says Sister Hilda Mateo, who coordinated the renovation project for the Missionaries Guadalupanas and holds a Doctor of Ministry in Hispanic Theology. Below she shares tips and lessons learned.



Designate a project manager or liaison.

Our provincial leadership team assigned me as the point person for the construction project. This freed them to continue focusing on their ministry to our community. I kept them informed and involved them when there were big decisions to be made. They gave me authority to make certain day-to-day choices. Being a member of the community, I understood what our real needs were—what was essential to our way of life and what wasn't. I communicated these to our contractor and really advocated for our sisters.

Hire a local architect.

The firm we chose for the renovation was the same one we initially used to conduct a structural analysis of our facility. They had experience with senior-living facilities, and, even though they were based out of state, we felt comfortable choosing them from among the bids we received. Once we got into the actual renovation project, we learned the architects were not up to speed on various city ordinances, which caused serious delays. And some of the recommendations they made, like what kind of windows we should have installed, were not well suited to our local realities. At least in our situation, we felt a local firm may have been better suited to our needs.

Ritualize the transition.

For each senior sister who came to live at our new facility, we had two rituals. The first was a sending forth ceremony from the local convent where the sister had been living. This gave the sister a chance to say goodbye and to acknowledge what she was leaving behind. Then we had a welcoming rite, commissioning the sisters in our retirement community for the next phase of their lives as religious.

Document the project.

As a community, we discerned together how best to provide space for senior members and sustain our missionary charism. Our sisters were on board with the project, but seeing it come together is a different kind of reality. So, at the end of every week, I took pictures and posted a three-minute video to document the progress. Most of our sisters minister in local missions and may visit the provincial house only once or twice a year. Seeing the changes from week to week helped give them a sense that this is their home too. (Documenting the project also served a practical purpose. At one point, it was my photos that enabled us to go back and identify a problem the contractor had missed.)

Make peace with the timeline and budget.

At some point, we had to acknowledge that we were not in control of the construction timeline. From the weather to materials being backordered, many aspects of the project were out of our hands. Construction delays sometimes impacted our budget, which was stressful. (In the end, we found ways to cut certain expenses to maintain our bottom line.) We had to learn to embrace patience, be flexible when plans needed to change, and trust in Divine Providence. Ultimately, we had to let go—which was as much a spiritual exercise as a practical one.

Our project implementation did not proceed as we initially imagined, but it was filled with blessings. We think of this house as a place where our sisters go forth into mission and where they return when their years as missionaries are complete.

—Sister Hilda Mateo, renovation coordinator

Message from the Executive Director

A sister experienced in leadership once told me, “Being a leader is like getting on a train that is already moving. It soon picks up speed and stops in unexpected places.” The speed and unexpected places take on elements of chaos. As we rattle along on the train, the temptation is to take time out in the dining car or a sleeping berth or, in last resort, pull the emergency stop cord!

Such delaying and denying tactics are not our call today. Organizational thinkers, spiritual teachers, and our own experience as religious call us to lean into the chaos—to claim that energy—and use our tools of prayer, communal reflection, discernment, and commitment to conversion to move through to a new reality. As Sister Hilda Mateo discusses in our lessons learned article (*see page 6*), there are times when we must surrender control and trust in the path God has prepared. Opening to the chaos puts us in touch with our values and our truest selves, helping us to renew charism and mission.

Of course, the train keeps moving! And we must attend to the practical realities the journey demands as we plan for new expressions of religious life. Whatever issues are calling for attention in an institute, we are gifted with many tools to address them: networking relationships with other like-minded entities; collaboration among religious institutes; Catholic organizations that aid leadership, finance, or eldercare decision-making; and the fruits of communal discernment. The perseverance of previous generations of religious and our continued commitment to mission inspire the needed work.



The National Religious Retirement Office is on the train with you and stands ready to help through our various programs.

Blessings for the journey,

Sister Stephanie Still, PBVM

NRRO Calendar

May

15-19 Retirement Needs Analysis (RNA) mailed. (Return corrections by May 30.)

16 NRRO Webinar:
Forgiveness: Essential to the Healing Process

June

14-16 USCCB General Assembly Meeting, Indianapolis, IN

26-30 Direct Care Assistance checks mailed

July

10 NRRO Assistance Review Committee meeting

17 NRRO Management Committee meeting

August

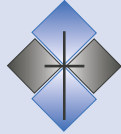
1-4 CMSM Assembly, Scottsdale, AZ

8-11 LCWR Assembly, Orlando, FL

22 NRRO Webinar: Topic TBD

September

26-28 NRRO Planning and Implementation Assistance workshop, Tampa, FL



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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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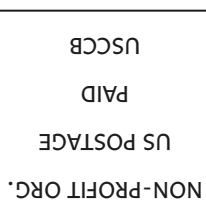
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Stay Connected

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



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