

# Retirement Fund for Religious

Sponsored by the  
National Religious Retirement Office



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## News

### NRRO Receives \$2.5 Million from the Conrad N. Hilton Foundation

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Recently, the National Religious Retirement Office (NRRO) was awarded \$2.5 million by the Conrad N. Hilton Foundation. The grant, which is the largest in NRRO history, will be paid over three years and will support the NRRO's ongoing efforts to assist religious communities with long-term retirement and property planning. Part of the Hilton Foundation's multi-million dollar Catholic Sisters Initiative, the award also furnishes direct funding for the day-to-day care of senior sisters, brothers, and religious order priests.

The NRRO is responsible for coordinating the annual Retirement Fund for Religious (RFR) collection and for distributing the proceeds to eligible religious communities. "We recognize the love and sacrifice that donations to the RFR represent, and we are committed to ensuring the broadest, most beneficial allocation of these donations," said NRRO Executive Director Sister Janice Bader, CPPS. "The Hilton Foundation grant will allow us to evaluate the efficacy of our current programming and to design

future strategies that best support the retirement needs of religious communities across the country."

#### Program Evaluation

A portion of the grant will be directed toward a comprehensive review of the NRRO's Planning and Implementation Assistance program. Launched in 2009, Planning and Implementation Assistance is a cohesive process for providing financial and consultative support to religious communities that are 40 percent or more underfunded for retirement. The goal is to help these communities reduce their retirement-funding shortfalls and thus increase their long-term ability to care for senior members. The evaluation will help the NRRO assess the program's



The NRRO Staff

Front, from left: Brother Hank Sammon, FMS, and Ms. Tiffany Lezama  
Back, from left: Ms. Monica Glover, Brother Bob Metzger, SM,  
and Sister Janice Bader, CPPS

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effectiveness in terms of bolstering retirement savings and enhancing elder-care delivery. It will also enable the NRRO to compile the best practices of communities that have used Planning and Implementation Assistance to decrease their retirement-fund liabilities.



Participants attend an NRRO planning workshop.

available a team of consultants who can provide hands-on assistance to religious communities in need.

“Ultimately, this grant will enable us to enhance our outreach in ways that will impact the current and future viability of numerous religious communities,” said Sister Janice. “Words cannot express our gratitude to the Hilton Foundation.”

### Education in Property Management

The majority of the grant will be allocated for the development of educational programming and resources to help religious communities navigate the complex area of property planning and management. Increasingly, communities are struggling to determine the best use for their large but often outdated congregational properties. Resolving these issues is an expensive, complicated, and extremely time-consuming process.

The NRRO plans to design instructional opportunities that can be made available to all interested religious communities. This education will draw on the wisdom of congregations that have successfully navigated their property-planning challenges. In conjunction with the educational initiative, the NRRO also hopes to make

### NRRO Calendar

#### February 2014

**19** NRRO Webinar—  
*Establishing an Emergency Operations Plan*

#### March

**16-19** Vicars for Religious Annual Assembly, Chicago, IL

**31** Direct Care Assistance applications due

#### April

**10** NRRO Assistance Review Committee Meeting

**22** NRRO Management Committee Meeting

**29** NRRO Planning and Implementation Workshop, Menlo Park, CA (through May 1)

#### May

**13** NRRO Webinar—topic TBA

## About the Catholic Sisters Initiative

### “This grant testifies to the stellar reputation and great work of the NRRO.”

Sister Rosemarie Nassif, SSND, Director for the Catholic Sisters Initiative

The Hilton Foundation’s grant to the NRRO is part of its Catholic Sisters Initiative, which was launched in 2013. The Hilton Foundation recognizes the outstanding contributions Catholic sisters have made to human development through their spiritual witness and their service to those in need. The new initiative seeks to enhance the vitality of congregations throughout the world, enabling sisters to minister more widely and effectively. It furnishes strategic support for three primary areas: membership, congregational leadership,

and resources. The Hilton Foundation’s grant to the NRRO will help religious communities reduce their retirement-funding deficits, thus promoting ongoing viability for congregations in the United States and ensuring that today’s members can continue the good works begun by their elders.

Conrad N. Hilton  
FOUNDATION

## Message from the Executive Director

Around our office, the blessings of the Christmas season extend far into January as donations to the Retirement Fund for Religious (RFR) collection continue to arrive. Year after year, Catholics from across the nation respond to the annual appeal with overwhelming love and generosity. And year after year, I am moved by their kindness, prayers, and, particularly, words of thanksgiving for the lives and service of our elder religious.

Our office recognizes that the good we are able to accomplish is made possible through the love and sacrifice of our donors. We take seriously our responsibility to steward donations to the RFR. Our goal is to ensure that we use RFR resources in ways that will have the greatest impact in the lives of senior religious and in the ongoing viability of their communities.

In order to prepare effectively for the future, we know that religious communities must first assess their current situations. The generous grant from the Hilton Foundation will allow our office to do the same. By evaluating our existing programming, we will better understand areas that are working well and areas where we can strengthen our approach.

We are also grateful that the grant will enable us to expand our efforts to help religious communities address various property-planning concerns. Buildings that

are underutilized and/or unsuited to the needs of older members often are a major obstacle to adequate retirement funding. We aim to develop resources to assist those facing complex property issues and also to collect and disseminate the best practices of religious communities that have successfully managed such challenges. After all, one of the greatest assets religious communities have is each other.



Another way our office strives to steward RFR donations is by compiling statistics that allow us to gain the most complete picture of the retirement situation for women and men religious today. In this effort, we rely on the annual data provided by congregations that complete our Direct Care Assistance application. **We encourage all communities to complete and return this form, even if not applying for financial assistance.** Taken together, this information helps us to discern the impact the RFR is having on retirement funding and to better ascertain the remaining need.

As we continue to consider ways that we can enhance and expand the support we provide to religious communities, I am reminded of the countless individuals who share in our mission through their time, prayers, and generosity. To all those working to ensure the care and well-being of our senior religious—as well as ongoing viability for their congregations—I offer my abiding thanks. May our loving God bless you.

Gratefully,

Sister Janice Bader, CPPS

### Announcements and Reminders

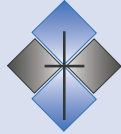
#### Stay Connected

Please send changes in address, phone, e-mail, or congregational leadership to the NRRO, c/o Tiffany Lezama ([tlezama@uscgb.org](mailto:tlezama@uscgb.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.



# National Religious Retirement Office

Sponsor of the Retirement Fund for Religious

**3211 4th Street, NE  
Washington DC 20017-1194**

**Phone:** (202) 541-3215

**Fax:** (202) 541-3053

**Email:** [retirement@usccb.org](mailto:retirement@usccb.org)

**Websites:**

[www.usccb.org/nrro](http://www.usccb.org/nrro)

[www.retiredreligious.org](http://www.retiredreligious.org)

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.

## Staff

### Executive Director

Sister Janice Bader, CPPS  
[jbader@usccb.org](mailto:jbader@usccb.org)

### Associate Director for Fund Distribution

Brother Henry Sammon, FMS, JCL  
[hsammon@usccb.org](mailto:hsammon@usccb.org)

### Associate Director for Planning and Education

Brother Robert Metzger, SM  
[rmetzger@usccb.org](mailto:rmetzger@usccb.org)

### Program Specialist

Monica Glover  
[mglover@usccb.org](mailto:mglover@usccb.org)

### Administrative Assistant

Tiffany Lezama  
[tlezama@usccb.org](mailto:tlezama@usccb.org)

U.S. Conference of Catholic Bishops  
National Religious Retirement Office  
3211 4th Street NE  
Washington DC 20017-1194  
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