

Retirement Fund for Religious

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National Religious Retirement Office



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News

Conference Highlights: Discover What You Can Learn

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For the second year in a row, the National Religious Retirement Office (NRRO) presented a series of educational workshops at the Resource Center for Religious Institutes (RCRI) national conference. Two thousand eighteen marked the ninth year for the conference, which draws an average of 500–550 participants. The jam-packed gathering offered 37 different workshops as well as three half-day, pre-conference sessions. In addition, a large exhibit hall allowed attendees to meet representatives from numerous companies and organizations that furnish products and services for religious institutes.

The NRRO track focused on aging, health care, planning, and retirement. Topics ranged from interpreting financial and demographic data to alternative models of eldercare delivery. Participants gained practical information while networking with various professionals and connecting with religious from across the country. Read on to learn more about the 2018 sessions and why you should make plans to attend the 2019 RCRI conference.

Participant Sister Angela Wagner (*standing, left*), DLJC, visits the NRRO booth at the RCRI conference and chats with NRRO staff members Karen Cañas and Sister Stephanie Still (*seated*), PBVM.



Conference Highlights

Explore highlights from the 2018 event and make plans now to attend the 2019 gathering (September 30–October 4 in Dallas, TX). The NRRO will once again offer an eldercare track.



Executive Director Sister Stephanie Still, PBVM, introduces a workshop on the NRRO eldercare track.

About the Resource Center for Religious Institutes (RCRI)

Established in 2009, the RCRI resulted from the merger of the National Association of Treasurers of Religious Institutes (NATRI) and the Legal Resource Center for Religious (LRCR). The RCRI is a membership organization that offers education, support, advocacy, and consultation on the myriad legal and financial issues impacting religious institutes. Its proprietary software, Tracking Revenue Expenses Net Assets Demographics Savings (TRENDS) is a forecasting tool that helps religious communities project long-term needs and assets.



trcri.org

The Path to Well-Being and Hearts to Hearts: Connecting with Persons with Dementia

Dayna Larson-Hurst

As an adjunct NRRO staff member, Dayna Larson-Hurst works to develop educational experiences that help leadership better support the needs of aging members. Primary areas of concern are promoting well-being and advancing the person-directed care model for elders with dementia. Dayna presented two workshops during the conference. *The Path to Well-Being* helped participants explore alternatives to traditional models of eldercare, while *Hearts to Hearts* offered strategies for more effectively engaging those with dementia.



Dayna Larson-Hurst



Above (clockwise from left): Participants Sister Christine Garcia, SSND; Sister Patricia Warbritton, CSJ; and Sister M. Juliana Monti, SSMO

Conference Highlights, continued

**Making Sense of Your Data
What Do You Do Now?**

Sister Anna Marie Tag, RSM

Among other responsibilities, adjunct NRRO staff member Sister Anna Marie Tag coordinates the eldercare consultation program. She focuses on helping underfunded religious communities—especially small institutes—plan for ongoing retirement needs. Her workshop provided insights on how communities can use demographic, financial, and property information to identify critical issues, name priorities, and plan for their unique realities.



Sister Anna Marie Tag (left), RSM, chats with participant Sister Leticia Rodriguez, CCVI.

**Hurricanes, Fire, and Floods: Will Your
Emergency Plan Work When You Need It?**

**Ray Mattes, IHM
Sister Roselle Haas, rc**

This session provided an overview of emergency preparedness for religious institutes, including the development and periodic review of a disaster plan. Longtime NRRO consultant Ray Mattes outlined steps for collaborating and coordinating with community care partners before, during, and after a disaster. Sister Roselle Haas, whose community was hit by a hurricane in 2017, shared insights and lessons learned from their ongoing recovery efforts. A question and answer period followed.



Participant Lori Pinkerton



Sister Roselle Haas, rc, and Ray Mattes, IHM



Participant Sister Margaret Wilhelm, FMA

Conference Highlights, continued

When Partnering is the Best Answer: How and When to Create Partnerships

Sister Rita Ann Bregenhorn, OSU
Brother Joseph Markel, SM
Ellette Gibson

This panel presentation featured insights and information from representatives of religious communities that have successfully developed partnerships in order to meet various congregational needs. Presenters offered their experiences and suggestions for identifying the right partner and developing the relationship. In addition, Sister Rita Ann Bregenhorn, provincial of the Ursulines of the Central Province, and Ellette Gibson, the community's chief financial officer, shared how participation in the NRRO's Planning and Implementation Assistance program aided their efforts.



Sister Rita Ann Bregenhorn (left), OSU; Brother Joseph Markel, SM; and Ellette Gibson



Catherine Keevey

Working Side by Side: Lay Staff and Religious Working Effectively Together

Catherine Keevey
Sister Julia Lanigan, GNSH

Sister Julia Lanigan, who just completed a 10-year term as congregational president, and Catherine Keevey, a former health-care coordinator who has worked extensively with religious institutes, recognize the pivotal role that lay staff play in eldercare. Both NRRO consultants, they offered tips and information on creating a climate of collaboration and how lay staff can share in congregational charism and mission.



Sister Julia Lanigan, GNSH



Conference Highlights, continued

Living Possibilities: Aging in the Right Place for Now

Sister Judith Mayer, SNJM

Where is the best place for us to live as we age? What options are available? What if our needs change? In her session, Sister Judith Mayer helped participants explore these and other questions. She also shared ways to help elders adapt to changes in living situations and ministry that may accompany aging. Participants were given an opportunity to share their questions, insights, and experiences, both in small groups and with the larger gathering.



Above:
Sister Judith
Mayer, SNJM

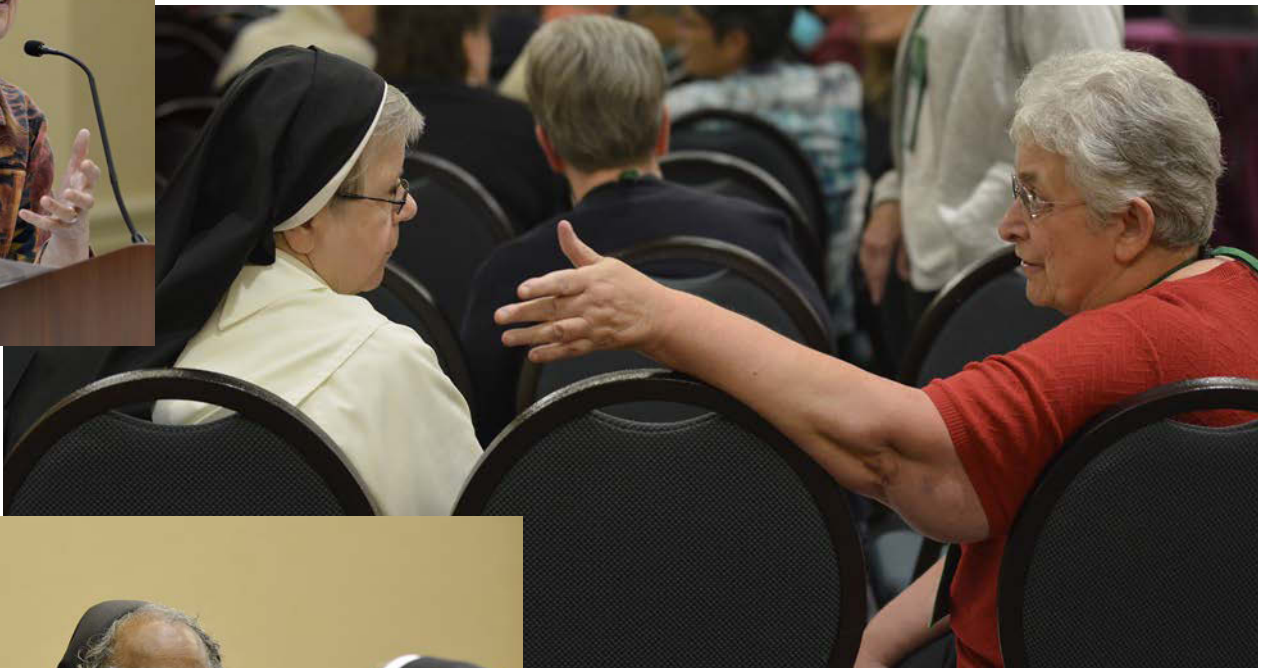
Partnering With Your Health-Care Provider

Sister Barbara Battista, SP

Navigating the health-care landscape can be complicated. In her workshop, Pharmacist and Physician Assistant Sister Barbara Battista shared strategies for improving wellness by making the most of interactions with doctors, physical therapists, and other medical professionals.



Sister Barbara Battista, SP



Above: Participants Sister Judith Ross, OP,
and Sister Marian Sgriccia, OSF

Left (center): Participant Sister Leona Bruner, SSF



Management and Continuing Education Assistance

Want to attend a workshop or maybe purchase forecasting software, but there's no money in the budget? The National Religious Retirement Office (NRRO) may be able to help. Each year, a portion of the annual Retirement Fund for Religious collection proceeds is set aside for Management and Continuing Education Assistance (M/CE).

M/CE offers eligible religious institutes distributions of up to \$5,000 per calendar year for the ongoing education and training of key management and health-care personnel as well as for the acquisition of basic management tools. Applications can be submitted throughout the year.

Distributions can be used for a wide variety of training and hands-on tools, including

- Participation in educational workshops and conferences, such as those sponsored by the National Catholic Development Conference (NCDC) and the Resource Center for Religious Institutes (RCRI)
- An NRRO Eldercare Consultation
- Financial assistance to underwrite forecasting software and related training and support
- Expenses for a facilitator to assist community leadership or members with eldercare processes
- Computers, software, and training for first-time computerization of accounting and/or development functions

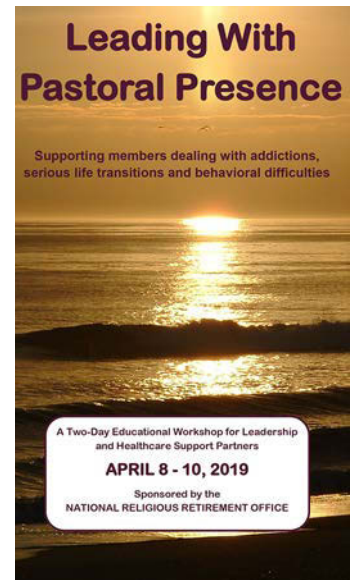
To learn more, visit usccb.org/nrro or contact Karen Cañas at (202) 541 3215 or kcanas@usccb.org.



Register for New Workshop: Leading with Pastoral Presence

April 8-10, 2019
Carmelite Retreat Center, Darien, Illinois

Designed for leadership and health-care support partners, this two-day workshop will offer hands-on strategies for supporting members battling addiction, depression, and other challenges. Increase your understanding of the difficulties these members face while learning how to connect them with available resources.



Learn more and download a registration form at usccb.org/nrro/resources.

TENDING THE VINEYARD

Stewardship of Religious Property

Tending the Vineyard Video Series

Need assistance with property planning? Our hands-on video series can help. Funded by a grant from the Conrad N. Hilton Foundation, the series features five videos and accompanying support materials that include tips, information, and methodologies for addressing specific property-planning issues. The videos offer guidance from property experts and insights from religious who have completed property initiatives at their own communities. Visit the Tending the Vineyard page on our website to access one or all five (usccb.org/nrro).

Message from the Executive Director

As a teacher for many years, education is one of my favorite topics. I suspect I am not alone, particularly among the audience for this newsletter! Whether we ministered in the classroom or maybe were a mentor for a young nursing student or retreat director, we all know that education is a central component of effecting change. I believe this is especially true when it comes to retirement planning and eldercare delivery.

Despite overwhelming and ongoing generosity to the annual Retirement Fund for Religious collection, there is no way the appeal alone could address all the retirement challenges faced by religious institutes. Even with adequate funding, communities would still need to understand and prepare for the physical and psychological changes that aging members may experience. Finding solutions to such issues as how and where to deliver eldercare, how to increase retirement savings, or how best to support members with dementia begins with learning the factors involved and the options available. Our workshops, publications, and online resources offer valuable information on these topics and practical steps for addressing them.

Collaboration with various organizations has enabled our office to expand the content and reach of our educational offerings. Given our long history with the Resource Center for Religious Institutes (RCRI), we are delighted to now be part of their annual conference. Our workshops are, I think, a useful complement to the RCRI's focus on legal and financial issues. I encourage every religious institute to attend this annual gathering. If funding is a problem, our program of Management and Continuing Education Assistance may help. (*See page 6.*)



Our quarterly webinars, offered in conjunction with the Avila Institute of Gerontology, address a wide range of topics and last just one hour. If the date or time is not convenient, online recordings can be accessed 24-7, as can a host of additional resources. We are also continually striving to develop workshops that tackle concerns ranging from the pragmatic to the pastoral. Our newest, *Leading with Pastoral Presence*, is targeted for congregational leaders and health-care support partners. (*See page 6 for more information.*)

I hope you will visit our website, join us for a workshop, or simply call our office for assistance. Learning is a critical step on the path to a stable retirement. Let us walk with you on that journey.

God bless,

Sister Stephanie Still, PBVM

NRRO Calendar

March

31 Direct Care Assistance applications due*

April

8-10 NRRO Workshop: *Leading with Pastoral Presence*
Darien, IL

11 NRRO Assistance Review Committee meeting

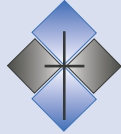
25 NRRO Management Committee meeting

May

13-16 NRRO Planning and Implementation
Assistance Workshop, Dayton, OH

14 NRRO Webinar, *Civil and Canon Law Issues
Related to Health Care*

*Must be postmarked by this date.



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Stay Connected

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

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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