

Retirement Fund for Religious

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National Religious Retirement Office



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News

Message from the Director

In this Issue

Director's Message	1
Celebrating a Milestone	2
Impact of Your Support	2
NRRO Calendar	3
In Case You Missed It: Newest Video Series	3



It is with profound gratitude that I share the remarkable progress achieved by the Retirement Fund for Religious in this issue of our newsletter.

This year, we mark a significant milestone: surpassing \$1 billion in contributions to support the retirement needs of religious communities across the United States. Such an accomplishment is a testament to the unwavering generosity of US Catholics, who have supported the fund since its inception and have ensured that the essential needs of retired religious are met.

This newsletter highlights the impact of these funds and the stories of the religious who benefit from them. Individuals like Sister Brenda Cherry, OSP, and Father Bertrand Ebben, OP, exemplify the dedication and service of aging religious women and men whose lives continue to inspire us all.

Looking forward, I'm excited to share that the next round of Direct Care Assistance applications will be available in early January, helping us to ensure that the National Religious Retirement Office continues to provide the necessary support to eligible religious institutes, helping them plan for and secure the future care of their elderly members.

Thank you for your commitment to the Retirement Fund for Religious mission. Together, we stand as stewards of this vital work, ensuring that those who have given so much to us are cared for with the dignity and respect they deserve.

In Christ,

John Knutsen
Director

Celebrating a Milestone: Over \$1 Billion in Total Donations

The Retirement Fund for Religious has achieved an extraordinary milestone—since its inception in 1988, the fund has raised over \$1 billion to support religious communities.

Thanks to the generosity of US Catholics, the National Religious Retirement Office (NRRO) has been able to distribute almost \$870 million in Direct Care Assistance to eligible religious institutes to date, supporting the day-to-day care of elderly sisters, brothers, and religious order priests.

In addition to Direct Care Assistance, an additional \$103.5 million has been allocated from the Retirement Fund for Religious to provide various funding programs aimed at assisting religious communities to plan for their retirement needs. These include support for retirement planning strategies, financial assessments, and educational resources.

Communities can also receive financial assistance for the purchase of management tools, software, and workshops to strengthen their planning efforts. Additional services, such as eldercare consultations and retirement needs analyses, further help religious institutes assess their future needs and improve eldercare delivery.

With consistent contributions, support from Catholic leadership, and ongoing education efforts, the Retirement Fund for Religious continues to make a lasting impact on thousands of aging women and men religious nationwide.

A Billion-Dollar Impact

Over the years, the \$1 billion in donations to the collection have been pivotal in addressing the most pressing day-to-day needs of religious institutes, including health care, housing, and daily living expenses for aging members.

These funds ensure that retired religious, all of whom dedicated their lives to service, receive proper care in their later years. For example, religious institutes have been able to provide necessary medical treatments and secure, safe housing.

Such support underscores the continued importance of the collection, which improves the quality of life for those who have served their communities selflessly. The impact of this generosity is evident in the lives of religious like Sister Brenda Cherry, OSP, and Father Bertrand Ebben, OP, pictured below, and many others, whose commitment to service endures even in their senior years.

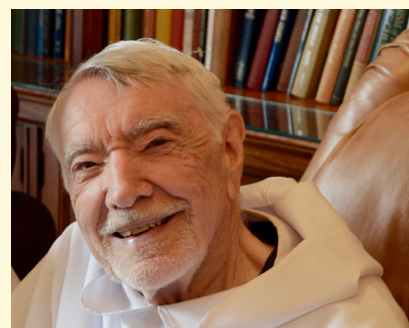
Impact of Your Support on Religious Communities

Sister Brenda Cherry, OSP, 85, who spent her ministry educating children in Baltimore; Washington, DC; and New Orleans, continues to serve at her community's child development center. Sister Brenda



credits the donors to the Retirement Fund for Religious for providing the support that allows her and her fellow sisters to live with dignity in their later years. “Our religious don’t retire—they just fade into glory,” she says, exemplifying the deep dedication that continues into their senior years.

Father Bertrand Ebben, OP, now 92 years old, continues to serve with humility and grace at St. Anthony’s Priory in New Orleans. His long life of dedication has been shaped by both pastoral



work and his commitment to teaching. Even in his retirement years, Father Bertrand’s work with the Southern Dominican Province has allowed him to stay connected to his community, providing spiritual guidance and pastoral care. Like so many religious, his ability to continue serving is made possible by assistance from the Retirement Fund for Religious. This critical support ensures that religious like Father Bertrand can live with dignity while continuing to make a meaningful impact.

Celebrating a Milestone: Over \$1 Billion in Total Donations, *continued***How the Retirement Fund for Religious Works: Collection and Distribution**

The Retirement Fund for Religious collection is held either on the second Sunday of December or at another time designated by individual (arch)dioceses. The money raised from participating (arch)dioceses is sent to the NRRO, where it is pooled into a collective fund. These funds are then distributed to religious institutes that apply and meet NRRO eligibility criteria.

Each year, the NRRO provides per capita distributions based on the number of religious members aged 60 and over within each institute. The distribution formula is carefully weighted, considering several critical aspects of each institute, including level of need, member age, and other criteria. Funds are distributed annually in June.

In 2023, contributions from the collection allowed the NRRO to distribute \$28 million in Direct Care Assistance to 286 eligible religious orders across the United States. The religious communities can apply these funds to immediate expenses or invest them for future care.

We're excited to announce that the next round of Direct Care Assistance applications will be available in early January. Religious institutes are encouraged to apply, and more information on the application process and eligibility criteria will be provided at that time.

Looking to the Future: Continuing the Mission

As we celebrate raising over \$1 billion for religious communities since 1988, we reflect on the lasting impact of this fund on the care of elderly religious. With the ongoing generosity of US Catholics and the support of the United States Conference of Catholic Bishops, we remain committed to ensuring the dignity and care of our aging sisters, brothers, and religious order priests.

Looking ahead, the NRRO will continue offering essential support through Direct Care and other programs, helping communities plan for the future. NRRO resources, such as eldercare consultations, webinars, and additional educational materials, will remain available to assist in addressing the evolving needs of religious communities.

Together, we can build on this legacy and ensure senior women and men religious continue receiving the support they deserve.

**In Case You Missed It:
Newest Video Series—Basic Elements of a
Comprehensive Retirement Plan**

Planning for the retirement needs of religious members can often feel daunting, and leaders of religious institutes may not always know where to start. Last year, the National Retirement Religious Retirement Office (NRRO) released its newest video series, titled **Basic Elements of a Comprehensive Retirement Plan**, to assist with this process.

This video series introduces five fundamental topics for constructing a retirement plan tailored for institutes of all sizes and types, including monastic and apostolic communities of both women and men.

The series is free to use and available for viewing at any time, in any order, and as often as needed, offering a solid foundation for anyone seeking to ensure the long-term care of religious members.

To access the series and explore other valuable resources, visit the NRRO website at usccb.org/nrro and navigate to the **Resources** section.

2024–2025 NRRO Calendar**December**

7–8 Retirement Fund for Religious
National Collection

January

3 Direct Care Assistance applications mailed

February

11 NRRO Webinar, Topic TBD

March

31 Direct Care Assistance applications due



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Stay Connected

Please send changes in address, phone, email, 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 United States to embrace their current retirement realities and to plan for the future.

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