



A Project of National Religious Retirement Office
Retirement Fund for Religious 3211 Fourth Street, NE, Washington, DC 20017 Phone: 202-541-3215
Funded by the Conrad N. Hilton Foundation. Bro. Stephen Glodek, S.M., Project Manager

Property Planning Workshop Schedule September 12-13, 2016

Monday September 12, 2016

7:30 Liturgy

8:00 Breakfast

9:00 Welcome: Susan Schorsten, HM
Prayer: Stephen Glodek, SM
Introduction: Susan Schorsten, HM

9:15 ***Leading Today to Sustain Tomorrow: Carol Zinn, SSJ***

Religious Institutes face enormous planning realities focused on present needs in the hope of serving the future. Might it be possible that the actual planning capable of birthing a future has more to do with the mission and charism than the congregation/membership needs? We will engage this question together as we continue to discern the role of leadership in sustaining the mission and charism of your institute for tomorrow.

10:30 Break

11:00 ***Property Challenges: Choosing among options:***
Mary Ann Dooling, OSU –

Fran Raia, CPPS - The 2004 CPPS General Chapter mandated that leadership explore options for underutilized Motherhouse space. We entered into a partnership with a for profit developer to renovate the space into 60 senior apartments and renovate the skilled care area of 50 beds. Through the advice and consultation with experts we were able to license the entire facility.

Sister Fran will share information about the decision making process, selecting a viable partner, communication with the community, and bringing the project to completion.

Susan Scholl, FSM – What are the various aspects and challenges of selling the Motherhouse? A discussion of the learnings when property is sold to one of your ministries, valuation issues, and a third party is involved; will also briefly review the transition for the congregation and related challenges and blessings.

12:30 Lunch

2:00 ***Coordinating the Project and Guarding the interests of the congregation:***
Mr. Thomas Richter

Starting a project can be very intimidating. We will discuss how a typical project comes together and how to avoid some of the major pitfalls.

3:00 Break

3:30 ***Green Building and Land Conservation; Stewardship in Action:***
Ms. Emily Andrews and Mr. Paul Todd Merrill

Faith communities are stewards of the earth and its inhabitants. Care for God's creation, the poor and the vulnerable are the core of Catholic social teachings. In *Laudato Si'*, Pope Francis calls us to act by addressing pollution, climate change, water, bio-diversity and global inequity. This session presents green building as a practical action to address these Catholic values by improving the environmental, economic and human health performance of our properties and landscapes.

5:30 Dinner

7:30 Refreshments and informal conversation with presenters

Tuesday September 13, 2016

7:30 Liturgy

8:00 Breakfast

9:00 Announcements

9:10 ***Diagramming a Dream:*** **Alfred Bradley, CSSR**

Without clear direction and crucial skills, a desire for adaptive change can often lead to confusion, frustration and inertia. To move a project from vision to fruition, organizational leaders can benefit from exposure to varying approaches and methodologies. The process of gathering and evaluating information, clarifying objectives, soliciting support and developing a plan can seem daunting. In this session, we will share how a collaborative process and acquired skills helped one community realize a dream.

10:15 Break

10:45 ***Renovate: Build or Renovate: Build Not - Elder Care Considerations:***
Anna Marie Tag, RSM

If your buildings are no longer suitable for the physical needs of your members, this session will provide you with tools to use and questions to ask yourselves to determine if you should Renovate/Build or Renovate/Build **Not** at this time in the life of your community.

12:00 Lunch

1:30 ***Partnership: What do you look for in a partner and what are the legal pitfalls? What are the negotiables and non-negotiables?***

Ms. Rosemary Corsetti – Ms. Corsetti will review the civil legal process of deciding on the best means of “partnering” with other organizations, whether that be from the congregational, provincial or ministry perspective. She will outline the best practices for such a project, projected timelines and the necessary approvals that may need to take place in this partnering process. Rosemary has served as in house general counsel to three national long term care chains, so she brings the operational expertise of how long term care actually works, and how the different type of long term care facilities may affect the partnering decision making process.

Sr. Doris Gottemoeller, RSM – I will focus on the experience of numerous joint ventures and collaborative efforts among and between religious institutes, focusing especially on the prior understandings and cultural elements which promote successful outcomes. What are some pitfalls to be avoided and some best practices to be adopted?

Dale Thompson – My experience/expertise will be in the arms of selecting a “Property Partner” / Negotiables and Non-Negotiable of the partnership, etc. I will offer information regarding two to three actual case studies of successful partnerships.

3:00 Break

3:30 **Breakout Sessions**

Financing Alternatives: Gerry Hempstead

We can dream and we can plan but at the end of the day the question comes up: “How are we going to pay for this?” Gerry has experience in working with developers, banks, and other institutions to find financing alternatives that can work.

Merging Provinces: Mary Owens, SSND and Jane Graves, DC

Lessons Learned, a conversation about the lessons learned leading up to, during the initial years, and following the merging of our different provinces. The processes leading up the Property Planning and the challenges of doing so as a new Province are also explored.

Capital campaigns: Georgette Lehmuth, OSF

Capital campaigns can be transformational experiences for the leadership and the vowed membership of a religious institute. It can also be an extraordinary experience for those invited to participate in such an effort. Explore the significance of a decision to begin a campaign, how to prepare both internally and externally for it, some tips and strategies that might be helpful, and some recommendations about what to do once the campaign has ended.

4:45 Conclusion: Carol Zinn, SSJ

5:30 Dinner

7:30 Refreshments and informal conversation with presenters

Wednesday September 14, 2016

8:00 Breakfast