

# Retirement Fund for Religious

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National Religious Retirement Office



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## News

### Hands-On Help: Workshops Offer Support for Retirement and Eldercare Challenges

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Two-thousand sixteen may well go down as the year of the workshop for the National Religious Retirement Office (NRRO), with staff members orchestrating a total of 11 gatherings in multiple cities. In addition to the workshops required for participation in the Planning and Implementation Assistance program, the NRRO also launched two brand-new educational experiences and hosted training for volunteer consultants. The various gatherings addressed a wide range of topics while offering participants opportunities to share their insights and experiences.

#### Tending the Vineyard Property-Planning Workshops

Funded by a grant from the Conrad N. Hilton Foundation, Tending the Vineyard (TTV) is a three-year initiative by the NRRO to disseminate resources and educational programming to promote effective property planning among religious institutes. For numerous institutes, the greatest obstacle to adequate retirement funding is determining the best use of outdated congregational properties, whether that means divestment or creative reutilization.

The TTV workshop was a jam-packed, two-day program that furnished information, training, and resources on complex property issues. It was designed for religious communities currently involved in property planning and those for whom property-related decisions are imminent. Speakers addressed topics including green building, legal concerns, renovation vs. new construction, and how effective planning can help



In 2016, the NRRO hosted 11 workshops on various topics.

*Above:* Sister Carol Zinn, SSJ, offers the keynote address during the Tending the Vineyard workshop.

*Right:* NRRO volunteer consultants at a February 2016 seminar.



## Hands-On Help, continued

sustain mission and charism. Multiple breakout sessions featured issues such as community mergers and capital campaigns. Participants left the conference with new ideas and resources as well as connections to other religious communities facing similar challenges.

The first TTV workshop was held in Baltimore on March 15–16, and a second workshop was held in St. Louis in September. More than 250 individuals from 123 religious communities attended these events. Other than travel expenses, all costs—including meals, accommodations, and materials—were covered by the grant from the Conrad N. Hilton Foundation.

### Dementia Workshop

The NRRO also launched another new workshop in 2016, *Moments of Grace: Learning to Companion Community Members with Dementia*. The workshop arose out of the need to provide education and support

*Right:* Brother Stephen Glodek, SM, is the project coordinator for TTV and oversaw development of the two-day workshop.



*Above:* Mr. Ryan Snow of the U.S Green Building Council offers a presentation on environmental issues and actions for congregational properties and land at the TTV workshop.

to those responsible for the health and well-being of elder members with various types of memory loss. Congregational leaders were invited to attend with one to two key members of the eldercare support team, such as the nurse manager and/or retirement coordinator.

The workshop took place over two full days. It began by defining the various types of dementia and overviewing signs and symptoms. Later, participants examined how to promote health, improve communication, and create more supportive living environments for members with memory-related challenges. The second day of the workshop offered tips and information on a team approach to care and highlighted the necessity of providing support to the caregiver. Participants also received details on various resources available to assist their efforts.

The inaugural workshop was held in May at the Bergamo Center in Dayton, Ohio, with 64 participants from 31 religious communities in attendance. It was so oversubscribed that the NRRO decided to offer a second workshop on November 1–2. Eighty-four participants attended, and there was still a waiting list. Workshop expenses were heavily subsidized by proceeds from the Retirement Fund for Religious. Participants paid a modest registration fee that included all meals, materials, and two or three nights of accommodations.



*Above:* Participants at the *Moments of Grace* workshop learn how to better support members with memory-loss.

**Hands-On Help, continued**

Feedback on the new workshop has been extremely positive. Many participants expressed satisfaction that much of what was learned could be put to immediate use.

**Consultant In-Service**

The NRRO trains and coordinates a network of more than 60 volunteer consultants who are experts in eldercare, financial planning, and community leadership. In conjunction with the NRRO staff, they provide personal, hands-on support for religious communities in assessing and addressing specific retirement issues. Periodically, the NRRO provides in-service gatherings to furnish consultants with professional updates as well as important developments related to NRRO programming and funding.

The NRRO hosted one such workshop February 10–12 in Baltimore, Maryland. A primary goal was to share findings from a comprehensive evaluation of Planning and Implementation Assistance. (*See below.*) Consultants also received information and support for various aspects of their work with religious institutes. Additional

mini-training sessions were held in April and September for new consultants and those who could not attend the February workshop.



Above: Sister Margaret Wick (center), OSF, shares thoughts with Father Scott Wallenfelz (right), SDS, during a February in-service workshop.

**Evaluation of Planning and Implementation Assistance**

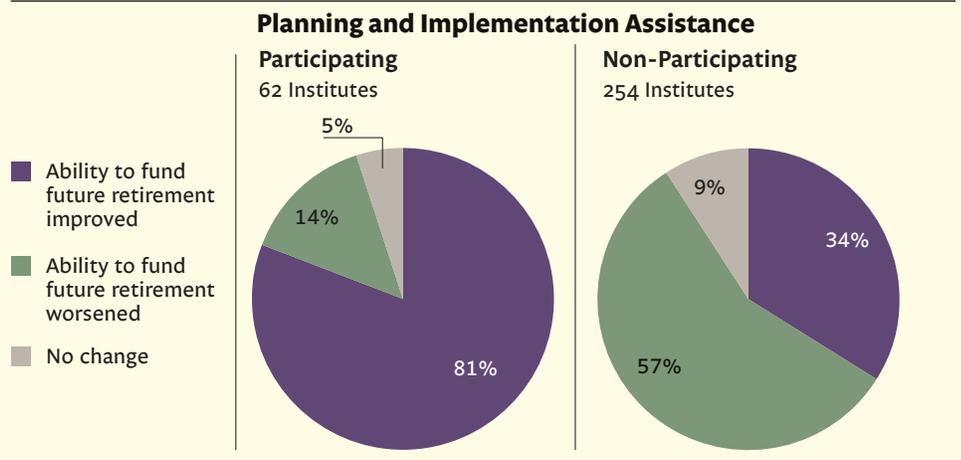
In 2014, the NRRO commissioned an evaluation of the Planning and Implementation Assistance (P and I) program, which was made possible by a grant from the Conrad N. Hilton Foundation. The review was conducted by Kerber, Eck, and Brackell, a firm specializing in providing consultative support to religious communities, and Sister Regina Fox, SSND.

The evaluation also analyzed the effect of P and I on specified quality of life indicators. One surprising result was that community life was often strengthened by the intense focus on retirement and eldercare required by the planning process. This focus led to a new awareness of the realities and long-term challenges facing

the community and an accompanying openness to change for the good of both the individual and the congregation.

The NRRO continues to implement various process improvements identified by the evaluation.

The assessment was conducted in 2014 and 2015. It analyzed the progress and outcomes of religious institutes that participated in P and I between January 1, 2009, and December 31, 2013. The final report, published in February 2016, details both tangible and intangible results of the program. Perhaps the most significant fiscal finding was the determination that, overall, program participants realized greater financial gains and improvements than those experienced by non-participating religious institutes. (*See graph.*)



## Hands-On Help, continued

### Planning Workshops

Three times a year, the NRRO hosts planning workshops for religious institutes beginning their participation in Planning and Implementation (P and I) Assistance. P and I offers extensive financial and consultative support to religious communities that are significantly underfunded for retirement. The planning workshop provides a concentrated opportunity for participants to work with assigned NRRO consultants to identify critical retirement challenges and develop preliminary plans to address them. Following the workshop, participants spend several months assessing long-term needs, evaluating the viability of proposed solutions, and, ultimately, implementing a plan that increases the ability to care for senior members.

In 2016, the NRRO rolled out an enhanced version of P and I, based on a comprehensive evaluation of the program. (See page 3.) Religious institutes eligible and interested in P and I were invited to attend one of two informational gatherings in January. The gatherings

provided a detailed overview of P and I and time for participants to work with NRRO consultants to better understand the planning process. Following the workshop, congregations decided whether or not to move forward with the program. Those choosing to continue then had a choice of attending an April or September planning workshop.

### Join Us!

NRRO workshops are a great opportunity to gain valuable information on retirement planning and eldercare while connecting with other religious congregations facing similar challenges. Attendance at these workshops is heavily subsidized by proceeds from the annual Retirement Fund for Religious collection, and eligible religious communities can apply for Management and Continuing Education Assistance to help defray travel costs. Watch for NRRO e-bulletins announcing offerings in 2017.

## NRRO Calendar

### November

**14-17** USCCB Fall General Assembly  
Baltimore, MD

**15** NRRO Webinar:  
*Living at Home, Thriving at Home*

### December

**10-11** Retirement Fund for Religious  
National Collection

**12-15** CMSM New Leaders' Workshop, Washington, DC

### January

**2** Direct Care Assistance Applications mailed

**13** NRRO Assistance Review Committee meeting

**22-24, 24-26** Informational meetings on Planning and  
Implementation Assistance,  
San Antonio, TX

**31** NRRO Management Committee meeting

### February

**14** NRRO Webinar: Topic TBD

## A Word of Thanks

*The staff of the NRRO wish to express our deepest gratitude to Sister Susan Schorsten, HM, for her service and leadership as interim executive director from June through September. We are grateful for her efforts to see the office through this period of transition, and we look forward to her collaboration in her continuing role as an NRRO volunteer consultant.*



## Message from the Executive Director

I am privileged to be greeting you for the first time as executive director of the National Religious Retirement Office (NRRO). I have been on the job for a little more than five weeks, and what a whirlwind it has been! Having served as president of my religious community, the Sisters of the Presentation of San Francisco, I was certainly aware of the financial assistance and programming the NRRO coordinates. Yet I have gained a new appreciation for just how many people work together to support senior religious and their communities, including our generous donors and the countless individuals who share their time and experience to further the NRRO mission.

As a former teacher, I value the NRRO's commitment to retirement and eldercare education. Many reading this newsletter likely spent at least some time in the classroom, and teaching was or is an important ministry for your community. As Presentation Sisters, education is in our congregational bones. We believe it empowers change. And when this education happens in a group setting—like one of the workshops highlighted in our feature story—it gains an added dimension. The value of these gatherings is not just in the tools, information, and resources acquired but in the exchange of ideas and experiences. Often, participants find others whose communities have faced similar retirement challenges and who can offer new insights or maybe just the comfort of an understanding ear.

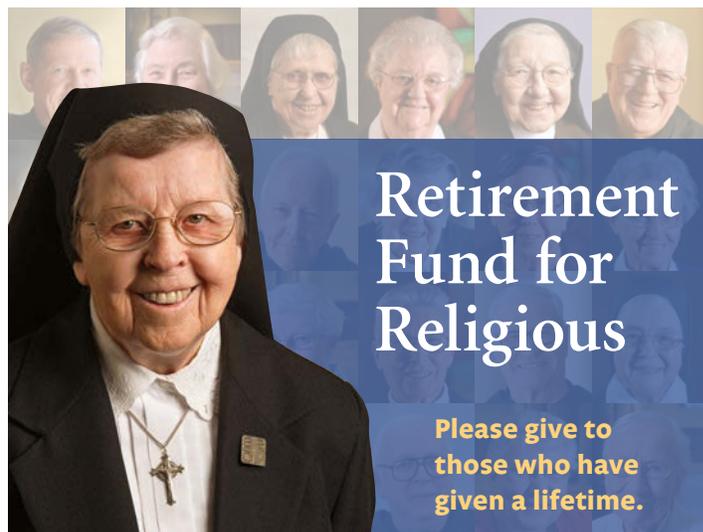
Recently, I attended the Resource Center for Religious Institutes (RCRI) annual conference. Religious visiting our booth spoke movingly about how much they value and rely on the assistance the NRRO provides, educational and otherwise. Since day one, I have understood that everything our office does is possible only through the generosity and sacrifice of Catholics across the United States who donate to the Retirement Fund for Religious (RFR).

The RFR collection is currently slated to end in 2017. Next week, at their Fall General Assembly, U.S. bishops will consider a request to renew the collection for an additional 10 years. My sincere thanks goes to Sister Susan Schorsten, HM, for her leadership and to the

NRRO staff for all their efforts during the critical period of preparation for this meeting. I ask for your prayers that the bishops will once again renew this vital collection. I also ask that you pray for the success of the 2016 national appeal, scheduled for December 10–11, and for the intentions of our donors, who continue to bless our nation's elder religious.

With gratitude,

Sister Stephanie Still, PBVM



### National Collection: December 10-11

Please help us raise awareness about the ongoing retirement needs of senior religious. Consider speaking at Mass and/or writing local pastors to express support of the collection. Most importantly, please join in praying for the success of the 2016 appeal and for the intentions of our generous donors.

The 2016 campaign materials feature 37 senior women and men religious. Meet them at [retiredreligious.org/2016photos](http://retiredreligious.org/2016photos).



# National Religious Retirement Office

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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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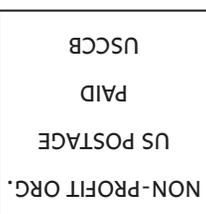
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## Stay Connected

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



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