



Engaging Aging

Salesians' Planning Ensures Healthy Future for Members

By Reverend Dennis Donovan, SDB

For several years during the 1990s, Father Tony Spano, one of our older members, an academic with a doctorate in biology, repeatedly raised a concern during provincial chapters. "We need to prepare a way to care for our senior members!" The urgency wasn't there yet since well over half the members in the province were under the age of 60. But Father Tony was forward looking. He wasn't necessarily sure how it should be done, but he knew it was necessary, especially as he was approaching age ninety himself!

Initial Plans

The province made a dramatic move in 2003 by investing in the construction of a senior care residence in Tampa, Florida. This large ranch-style house is named St. Philip the Apostle Residence, after the patron of our province. It includes a kitchen, dining room, living room, exercise room, chapel and thirteen bedrooms with private baths, appointed with all the comforts of home. The house is situated on the campus of Mary Help of Christians Center, which at the time was a former orphanage converted to a middle school. Located on East Lake in Tampa, the campus is an idyllic location for the senior residence.

"The community surrounds its sick and aged confreres with care and affection. They in their turn, accepting their condition and serving the community in whatever way they can, are a source of blessing for it; they enrich its family spirit and deepen its unity."

[Salesian Constitution, Article 53](#)



Father Dennis Donovan, SDB, is the province delegate for elder care for the Salesian Society, New Rochelle Province (Canada & Eastern USA). He serves as director of the Marian Shrine and Retreat Center in Stony Point, New York. Prior to that he served for nine years as the province treasurer and had previous assignments as the director of the Salesian Community in Tampa, Florida, and as executive director of the Salesian Boys & Girls Club of Columbus, Ohio.

Salesians' Planning Ensures Healthy Future for Members, continued

This accomplishment was a great relief to members of the province. Father Tony's dream had finally been fulfilled. The call to provide care for the elderly had been answered! Or so we thought.

It turned out to be a rough beginning. Only two elderly members were sent there, both with dementia. One had an advanced stage of Alzheimer's disease. Father Ken Shaw, SDB, was assigned to assist them, and he hired some additional staff to help. Unfortunately, the house developed a reputation as "the place where Salesians go to die." Nobody asked to be assigned there. Even Father Tony, who championed the urgency of eldercare planning, never actually saw the place.

I was assigned to Mary Help of Christians, the facility where the retirement residence is located, in 2004, first as the local treasurer and then as director from 2006-2012. Working together with Father Ken, we soon realized that as beautiful as the house was, and well furnished, there were some issues to be addressed.

Identifying Challenges

St. Philip Residence had been designed as a simple rectory for independent living with some assistance. But the men we sent required assisted-living services that were just short of skilled nursing care. Only two of the fourteen bathrooms in the house were Americans with Disability Act Standards for Design (ADA) compliant, and neither of those was in anyone's bedroom. The heating, ventilation, and air conditioning system (HVAC) was divided into three zones. Residents had a choice to live in the hot zone, where everyone kept their windows open because it was too cold, or in a cold zone, where the air conditioning was cranked up to freezer limits. Condensation dripped in places where the air conditioning was subjected to

Florida's high humidity. The dining room, chapel and living room were sort of in-between.

The kitchen and dining room presented spatial challenges. The dining room was too small, didn't have windows and was poorly separated from the kitchen. The sliding doors between the two rooms were never closed. Consequently, the senior Salesians, used to helping around the house all their lives, wandered in and out of the kitchen freely. At times, there were more of us in the kitchen than in the dining room!

Criteria for Placement Issues

An unwritten rule had been established when St. Philip Residence was built, that if anyone required the use of a wheelchair or could not dress or wash without assistance, he should be re-assigned to a nursing home. But the line between being independent and dependent was a blurry one. We also found that assigning persons to an assisted-living facility was totally unaffordable for the province.

Property Changes and Re-structuring

In May 2006, a new problem developed on campus that had an impact on the residence. The middle school on the property closed due to a lack of enrollment. The beautiful new senior residence, subsidized by the province, was gradually becoming surrounded by structures and property that were falling into disrepair for lack of income to support the upkeep of the campus.

After a one-year strategic replanning for the use of the property, the Salesian apostolate at Mary Help was restructured. Renamed as Mary Help of Christians Center, a new school was opened, a local parish relocated to the campus and a newly constructed Boys & Girls Club was built right next to St. Philip Residence. These changes brought life back to the Mary Help property. The sound of children playing in the

Salesians' Planning Ensures Healthy Future for Members, continued

yard made the setting more like that of the oratory of our founder, Don Bosco. Crowds of people came to worship, meet and play. A summer camp flourished as a joint venture between the Salesians and the Boys & Girls Club. Instead of two communities, one for the school and one for the senior members, we combined into one community, sharing our meals, prayer times and community meetings together.

With these improvements, St. Philip Residence became a more attractive option for the senior members of the province. The reputation of the residence improved, as did the quality of care. A steady stream of volunteers spent time with the senior members and took them on outings. St. Philip's became a fun place for Salesians to visit. Even a Salesian bishop entertained the idea of moving in when he retired.

Need for Expanded Planning

In 2012, I was given a new assignment as province treasurer. After two years on the job, it be-

came clear that the care for our older Salesians required something more than just the maintenance of a nice house. We lacked a clear plan for how to treat the individuals who needed assistance. The expenses were mounting as the house filled up. Almost all those over 65 were receiving Supplemental Security Income (SSI) and were enrolled in Medicare and Medicaid because very few had paid into Social Security during their lifetime. A few were receiving Veterans Affairs benefits. We had a retirement fund managed by a private foundation, but that wasn't quite enough. The lifesaver was the annual assistance we received from the National Religious Retirement Office (NRRO).

During the 2015 annual conference of the Resource Center for Religious Institutes, I was introduced to the Planning and Implementation process offered by the NRRO. Treasurers from other religious institutes told me about how wonderfully the program helped them to study, as-

St. Philip the Apostle Residence in Tampa, Florida, a senior care facility for Salesians of Don Bosco (all photos used with permission of Salesians of Don Bosco, Province of Canada and Eastern USA)



Salesians' Planning Ensures Healthy Future for Members, continued

sess and resolve some of the issues they were facing in caring for their elderly members. I also learned that the Salesians of Don Bosco were one of the few religious congregations that still had more younger members than older ones. They told me that it was an ideal time for the Salesians to prepare a way to meet the awesome responsibility of providing funds for something I had never heard of before: past service liability. This is the amount of funding that should have been collected during the lifetime of confreres in the past to pay for their long-term care in the present and future.

NRRO Education and Planning Assistance

In December 2015, the province sent a team of three, including myself, our vice provincial Father Timothy Zak, SDB, and one lay staff person, to attend an introductory meeting offered by the NRRO, at their expense, in San Antonio, Texas. We learned how to design a philosophy of eldercare and take steps to decrease the unfunded past service liability. I learned so much during that first meeting. We immediately decid-

ed to pursue the process further. A province eldercare team was commissioned to follow through, and the province committed to participating in the NRRO Planning and Implementation process.

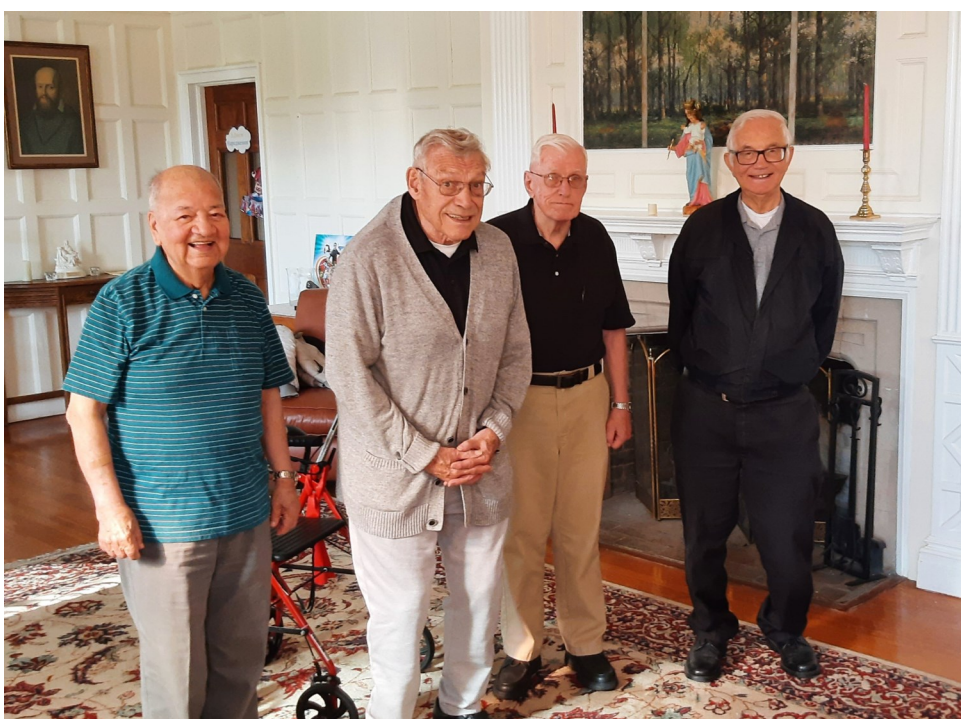
On June 11, 2016, the NRRO assigned consultants to guide the eldercare team: Sister Mary Pat LeRoy, SNJM, and Sister Hertha Longo, CSA. After their visit, and with the help of monthly meetings by phone, the eldercare team moved quickly. An eldercare site visit was conducted by Sister Ruth "Betsy" Goodwin, OSF, and Catherine M. Keevey on July 5-9, 2016. They visited St. Philip Residence in Tampa and issued a report following the consultation.

We learned quite a bit from that report. For example, it recommended that we make all bathrooms ADA compliant, that the furniture in the dining room should be age-appropriate for the elderly, that we need to secure the medicine cabinet (we still had a few members with memory issues), and that we should enforce the

rules about when to stay out of the small kitchen. Recommendations were made for the physical exercise of the members, meeting dietary needs, and the frequency of social outings. The dining room lacked sufficient space, creating fall hazards.

Our NRRO consultants also made a site visit to our community in Stony Point, New

(Left) Salesians of Don Bosco in Stony Point, New York, (from left) Brother Charles Thenier, Brother Henry Van der Velden, Brother Joseph Ackroyd, and Brother Richard Pasaik.



Saleians' Planning Ensures Healthy Future for Members, continued

York, where several of our senior members lived. Their observations there were, likewise, helpful. These trips and resulting reports were funded through the NRRO because of our commitment to the process.

Sister Hertha Longo made a special visit to our provincial center in New Rochelle, New York, on August 10-13, 2016, to help us set up another vital tool in the process: TRENDS. This software tool was developed by the National Association of Treasurers of Religious Institutes (NATRI) in 2000 for Tracking Revenue, Expenses, Net assets, Demographics, and Savings. Data input was provided by our province bookkeeper, Mary Kate Havranek. Sister Hertha generated our first TRENDS report. This was presented to the members of the province and used by the provincial council in making plans for the two-year period to follow. This report was updated in subsequent years.

The eldercare team attended a follow-up training hosted by the NRRO at the Bethany Center in Lutz, Florida, on September 20-22, 2016. There, we prepared an initial outline document which would include our province's comprehensive plan for aging and eldercare and a timeline for its development. The first draft of the plan was given the title "Transitions in Life."

Keeping Members Informed

To communicate what we were doing to the rest of the province membership, the team worked on a creative video about the Planning and Implementation process. Simply using PowerPoint, the video was produced and sent to each community on a DVD, along with a worksheet



(Above) Father Javier Aracil, SDB, offers daily Mass at the Marian Shrine Residence in Stony Point, New York.

with questions to be considered by the members. These tools engaged every member in the process of creating the written comprehensive plan. The video included photos of the members and details about each location. The video is available for viewing on YouTube at <https://youtu.be/lga3pSjcEkY>

On November 14, 2016, Fr. Tim, who had by this time become the provincial, distributed to all the members a twenty-page study booklet: "Transitions in Life for Salesians of Don Bosco: Reflections and Conversations on the Process of Aging." Our local communities were encouraged to study and discuss the contents of the document. The responses to the study were used in revising the "philosophy of aging" section of the comprehensive plan. Subsequently, the plan was disseminated chapter by chapter for study and comment in the local communities.

Comprehensive Plan

By the time we finished, our comprehensive plan, "Transitions in Life," covered:

Salesians' Planning Ensures Healthy Future for Members, continued

- our province philosophy of aging and eldercare;
- the provisions we made for eldercare services including the levels of care;
- a review of the physical, spiritual, and psycho-social needs of our members;
- recommendations for the financial management of existing funds and sources of future funding;
- steps for the management of our facilities to build the capacity to serve older members.

This plan was the first step in a process that is now continually updated as the needs of our members and the situations around us change. Two areas of particular importance for us involved our levels of care and the capacity to house and provide safe quality care for the members who required assisted living.

Physical Plant Study

Through 2017, the eldercare team continued to meet monthly, either in person or via teleconference. Then the NRRO awarded the province a planning grant of \$118,000 to take our planning to the next level. We used this grant to acquire the services of Joseph C. Hafner of Hafner Architects. With his help we deciphered the results collected during the "Transitions in Life" study and created a plan to upgrade our property to increase our capacity to provide for the long-term care of our senior members. He translated the plan into an architectural design for expansion of the St. Philip Residence to add nine new ADA compliant bedrooms, enlarge the kitchen and add a new dining room with a verandah facing the lake. He also directed us to interior decorators and furniture consultants with experience in assisted living settings. This process lasted about one year. However, we never

actually implemented that capacity building plan in its entirety.

Shifting Needs Come to Light

Beginning in late 2018, we noticed that many of the conditions we were addressing changed in a short period of time. These came to light in four ways:

- an updated TRENDS report;
- members who were speaking up that they wanted an alternative to the Florida option;
- the creativity of the members already living in Tampa;
- the COVID-19 pandemic.

However, the education we received from our architectural consultant helped us to broaden our vision and make the necessary adjustments.

TRENDS reports generated from 2018 to 2020, a year before my term as treasurer expired, indicated that the need for extra rooms for older Salesians was not as critical as we first thought. The larger local communities in the province were making accommodations so that their senior members could stay at their location with services provided through Medicare. When the pandemic struck, it claimed the lives of some of our senior members, diminishing our membership in a multitude of ways. For all these reasons, our need for expanded capacity became less urgent, at least for the time being.

Residents Suggest Their Own Changes

The members of the local community in Tampa, who by this time have taken ownership of their own version of the Planning and Implementation process, suggested another option to improve their living situation: swapping the living and dining rooms. This made great sense because the living room had glass sliding doors to a large verandah. It was almost twice the size of the

Salesians' Planning Ensures Healthy Future for Members, continued



(Left) Salesian of Don Bosco Father Jay Horan celebrates his 40th ordination anniversary at St. Philip Residence, Florida

dining room and situated about forty feet from the kitchen. The light from the verandah was bright, making it difficult to watch television comfortably. The former dining room, without win-

dows, became the perfect setting for TV watching. The sliding doors to the kitchen were closed and a sofa placed in front of them. Since fewer people navigated to the kitchen, the cooks were able to move about freely without Salesians in the way.

These simple solutions saved us considerable money, about \$500,000, which the province then placed into the province retirement fund. By now also, the local communities have a better awareness of the importance of contributing to the senior care retirement fund. Voluntary contributions by the communities have increased substantially so that the value of the fund is more than double what it was when we started the process.

Looking Forward Today

As of this writing, most of the goals set by our planning have been implemented. While there were funds available from the NRRO for an implementation phase, we did not find it necessary to apply for them.

Today the province has a written senior care plan. It will be presented to the province for in-

clusion into our official Province Handbook this summer during our next provincial chapter.

Our properties for the care of our senior members have been improved. We have seven new ADA compliant rooms for seniors at our residence in Stony Point, along with physical and professional accommodations to help the men. The senior residence in Tampa has a larger dining room, a comfortable living room and a manageable kitchen. Renovations are underway to make the bathrooms there ADA compliant. Backup electrical generators are in place at both the Stony Point and Tampa locations.

A process for an annual review is in place. Once travel and other restrictions are fully lifted for the eldercare team of the province, we will make our first official visit to both locations to evaluate the situation of the facilities and to hear from the members who reside there. Through the province delegates for eldercare, all of the members of the province, regardless of age, have opportunities to express their concerns.

The Planning and Implementation process, from first conception to our official adoption of the senior care plan in our Province Handbook and implementation of the plan, took just under seven years. And this, in spite of a pandemic!

Our provincial, Father Timothy Zak, who participated in the process from the very beginning as a member of the eldercare team, sums up the process in this way: "I'm very grateful to the NRRO for the Planning and Implementation process. The eldercare team and province leadership learned so much."

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

Phone: (202) 541-3215

Fax: (202) 541-3053

Email: retirement@usccb.org

Websites:

www.usccb.org/nrro

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Staff

Executive Director

Sister Stephanie Still, PBVM
sstill@usccb.org

Grants Specialist

Monica Glover
mglover@usccb.org

Program Associate

Karen Canas
kcanas@usccb.org

Education & Outreach Manager

John Knutsen
jknutsen@usccb.org

Affiliated Independent Consultants

Sister Anna Marie Tag, RSM
NRROConsult-AMTag@usccb.org

Ms. Dayna Larson-Hurst
NRROConsult-DLHurst@usccb.org