

Retirement Fund for Religious

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National Religious Retirement Office



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News

~~Plan A, Plan B, Plan C: Faith and Perseverance~~ Pay Off for the Trinitarians

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In January 2014, the Order of the Most Holy Trinity and of the Captives—the Trinitarians—entered the National Religious Retirement Office (NRRO) Planning and Implementation Assistance program. Their goal was to increase retirement funding and develop a comprehensive policy on aging. Although they understood the process would be neither quick nor easy, they could never have anticipated the myriad challenges they would encounter—and overcome.

“Our first planning call with the community was in February 2014. Over almost six years, we had 41 conference calls, changes in leadership on their end and consultants on ours, and endless zoning issues. They could have given up at any point, but they persevered and can now look forward to a future that is much more secure.”

Sister Anna Marie Tag, a member of the Sisters of Mercy of the Americas and the NRRO's consultant to the Trinitarians.

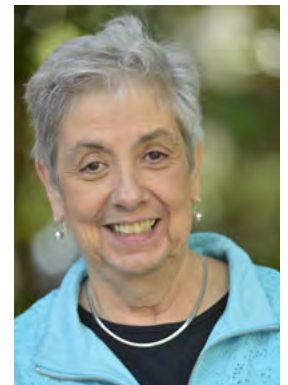


Photo: Jim Judkis

The Trinitarians participated in the NRRO Planning and Implementation Assistance process to determine the best use for their congregational property, which included a 30,000-square-foot retreat center (*right*).



Photos on pages 1–5 provided by the Trinitarians, except as noted.

Faith and Perseverance Pay Off for the Trinitarians, continued

Plan A

The Trinitarians—with 24 members, 15 of whom are older than 70—recognized that the only way to stabilize their retirement outlook was to determine the best use of their expansive but significantly underutilized provincial property. Situated on 36 acres in a suburb of Baltimore, the property includes a 30,000-square-foot retreat center and a circa 1900 mansion that houses the provincial offices and some living quarters. Maintaining the buildings and land was a continual drain on the community’s finances.

A 2015 feasibility study, funded by an NRRO planning award, found that the Trinitarians’ best option would be to sell the property for residential use or for senior

Located on 36 acres, the Trinitarians’ property was expensive to maintain and no longer suited to the needs of the community. Zoning issues limited the possibilities for alternative uses of the land.

living. The community liked the idea of selling to a Catholic health-care organization that could develop the property for assisted and independent senior living, thus continuing a legacy of service on their land.

This option, however, hit immediate roadblocks: The property was not zoned for senior housing, and zoning changes in the rural area were permitted only every four years. “We spent a lot of time, effort, and resources trying to have the property rezoned for senior living,” says Father Kurt Klismet, the community’s treasurer since 2003. “But the county ultimately denied our request.”



A mansion, built in 1909 and gifted to the community with the property, served as the provincial headquarters.



“We spent a lot of time, effort, and resources trying to have the property rezoned for senior living, but the county ultimately denied our request.”

Father Kurt Klismet, Treasurer

Faith and Perseverance Pay Off for the Trinitarians, continued

Plan B

With senior living eliminated, the Trinitarians focused on selling the property for residential use. In 2016, an additional NRRO planning award underwrote the legal and engineering services needed to divide the property into plots and ready it for sale. The new plan, which received county approval, allowed the community to keep the provincial house and cemetery but sell the remaining land and buildings.

In May 2019, the Trinitarians began seeking bids from developers and soon encountered new obstacles. Many developers were interested in the property but unwilling to take on the high cost of dismantling the retreat center, which contained asbestos. A declining housing market in the area further reduced the number of interested buyers.

Plan C: Success!

As prospective buyers dwindled, a friend of the Trinitarians suggested they sell the property to a nearby Jewish school that wanted to expand. Because the property would continue to be used for religious purposes, there were no zoning concerns. The school's initial bid was edged out by a developer whose higher offer fell apart during negotiations.

The school submitted a second bid but, this time, sought to buy the entire property. The new offer included a provision that the Trinitarians could remain in the provincial house for three years, and it also provided funds to relocate the provincial cemetery. The sale was finalized on June 29, 2020, almost six years after the community had submitted its first application for planning funds on June 30, 2014.



Ms. Adriana DiProspero, the Trinitarians' accountant (*left*), and Father Frank Whatley, Senior Care Coordinator, collaborated with Father Kurt (*see page 2*) as part of the community's Planning and Implementation Assistance team.



About the Trinitarians: Province of the Immaculate Heart of Mary

Founded by St. John de Matha and St. Felix of Valois in the late 12th century, the Trinitarians today are an international religious order ministering in countries around the globe. The order's USA foundation became the Province of the Immaculate Heart of Mary in 1950. Province members minister in parishes and educational institutions and have a special outreach to persecuted Christians and the poor. As such, a mission in the

Philippines was established in 2018. The province also supports the order's international efforts to provide education and job training for oppressed Christians and the disadvantaged in India and Syria. They sponsor DeMatha Catholic High School, a college preparatory school in Hyattsville, Maryland, that the community founded in 1946.

Faith and Perseverance Pay Off for the Trinitarians, continued

Staying the Course

The Trinitarians persevered not only through numerous obstacles but also through three changes in leadership. “From the beginning, our community was committed to seeing this process through,” says Father Kurt. “Although our minister provincial changed during the planning process, we had stability on other parts of the provincial council, which helped.”

Consistent, open communication was a key factor in the Trinitarians’ ability to weather the ups and downs of addressing their property concerns. Beginning in 2013, the leadership team organized regular meetings to apprise members of the province’s financial and demographic challenges and to seek feedback on proposed plans. Understanding the practical realities helped all members to accept the difficult decisions that had to be made.

As months turned into years, prayer and faith sustained the community. “Our order has a special devotion to Our Lady of Good Remedy,” says Father Kurt. “Throughout this process, we relied on her. The offer that eventually worked out came through on October 8, 2019—her feast day.”



Support for the Transitions of Aging

Entering the Planning and Implementation Assistance program, the Trinitarians recognized the need to develop a comprehensive plan for aging members. Their practice was and is that retired members who can live independently should remain in the local community houses where they have resided or ministered most recently. For elders who need some level of support, the community tries to find a nearby Catholic institution, ideally one that offers continuing care. “It’s so important to have those ongoing connections—to parishioners, to former apostolates, to the community they know,” says Father Kurt.

The Trinitarians’ policy on aging incorporated input from members across the community. *From left:* Fathers Bill Axe and Victor Scocco.



The Trinitarians needed to transform their practice into policy so they would have guidelines to support aging members in their transition from ministry to retirement and from independent living to receiving some level of care. A small committee was created to focus on the issue. The group consulted a broad section of the province, specifically gathering input from members who were not in leadership. They also incorporated advice and resources from eldercare professionals, including NRRO consultants. These efforts resulted in a policy on aging that offers objective criteria for assessing health and wellness and that addresses the practical, physical, and spiritual needs of the elder.

Faith and Perseverance Pay Off for the Trinitarians, continued

A Renewed Sense of Hope

With the sale of the property complete, the Trinitarians are moving quickly to implement other aspects of their long-term plan. A new trust, funded by proceeds of the sale, was created to ensure ongoing support for senior care, mission, and formation. The provincial cemetery was relocated to one owned by the Archdiocese of Baltimore. There, the Trinitarians have their own section.

Recently, the community purchased a large house that will serve as their new provincial headquarters and formation residence. The 16,000-square-foot dwelling features 10 bedrooms, gathering space, and an area for a chapel. The Trinitarians also bought their first house designated specifically for retired members who can live

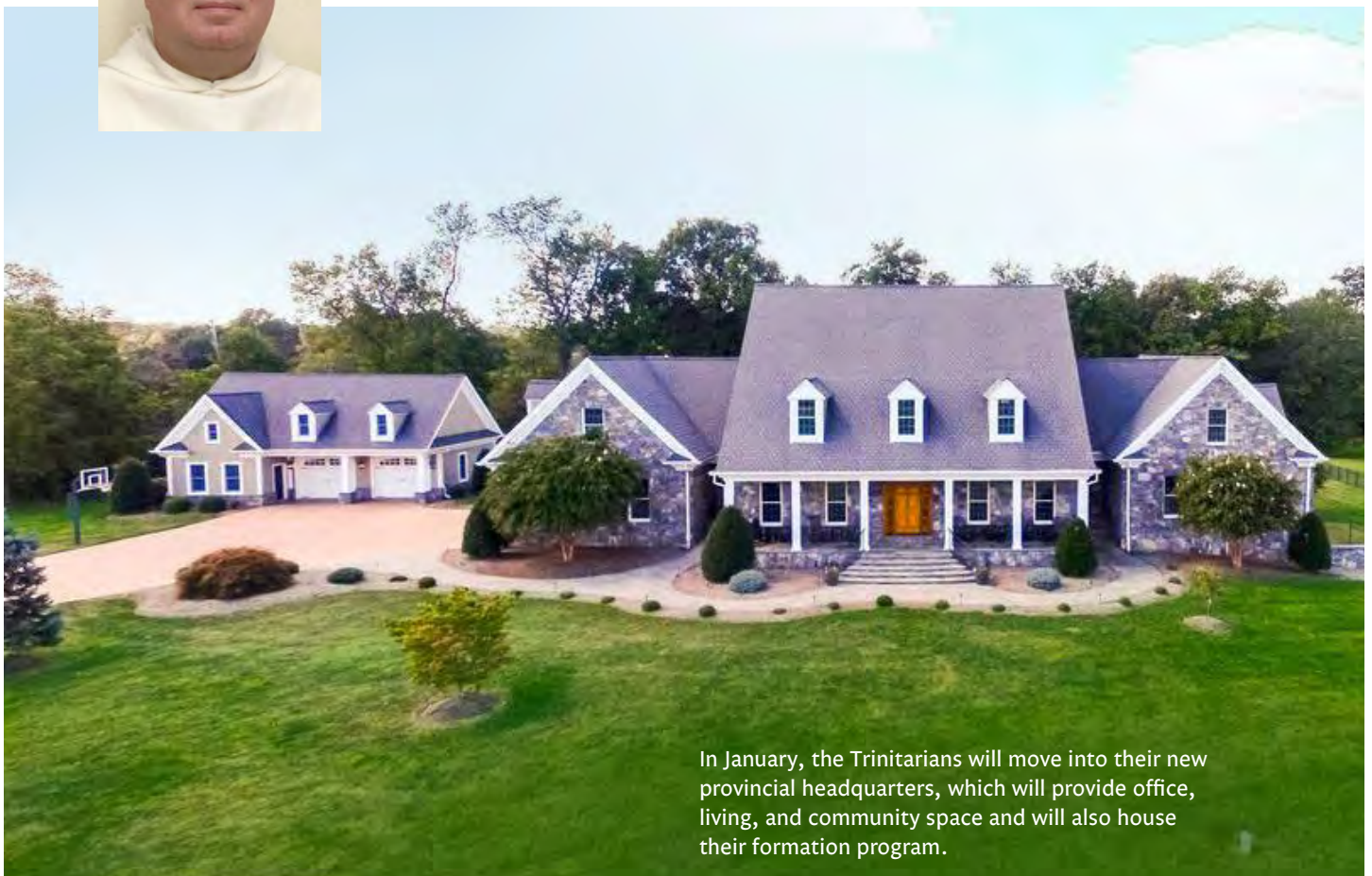
independently. Located in downtown Baltimore, the residence provides easy access to health-care facilities, the archdiocesan cathedral, and other amenities to help elders remain engaged and active.

The road to greater financial stability required patience and sacrifice, but members young and old are now excited and hopeful about the future. “We could never have moved forward and reached the decision to sell our property and set our sights on the future without everything the NRRO did to assist and support us, especially Sister Anna Marie,” says Father Albert Anuszewski, who became the minister provincial in 2018. “I truly believe this decision is the seed from which new life will spring forth.”



“I truly believe this decision is the seed from which new life will spring forth.”

Father Albert Anuszewski, Minister Provincial



In January, the Trinitarians will move into their new provincial headquarters, which will provide office, living, and community space and will also house their formation program.

Retirement Fund for Religious National Collection



The national Retirement Fund for Religious collection will be held in most US parishes December 12–13.

The annual appeal underwrites all the financial assistance, services, and educational resources that the National Religious Retirement Office (NRRO) provides. Due to ongoing Covid-19 concerns, many parishioners may be unable to attend Mass in person to learn about the appeal. More than ever, the success of the collection will rely on the collaboration we receive at the local level.

Please help raise awareness of the retirement-funding crisis that affects hundreds of US religious institutes. Downloadable resources, including text and images to share on social media, are available at retiredreligious.org/materials.

Above, from left:

Sister Alice Garcia, SSCJ
 Brother Martin Gonzales, OCSO
 Sister Theresa McGrath, CCVI
 Sister Anne Cecile Muldoon, OSU
 Abbot Emeritus Peter Eberle, OSB

Direct Care Assistance Reminder

Direct Care Assistance (DCA) applications for 2021 will be mailed from the NRRO on January 4. Downloadable forms will also be available on our website after January 1. The deadline to apply is March 31, 2021.

Whether or not your religious institute receives funding, please consider completing the DCA form. Your information helps the NRRO develop a more complete picture of retirement needs and assets among US religious institutes. If you have questions, please contact NRRO Grants Specialist Monica Glover at mglover@usccb.org or (202) 541-3216.



NRRO Calendar

December

12–13 Retirement Fund for Religious National Collection

January 2021

4 Direct Care Assistance applications mailed

February

9 NRRO Webinar, Topic TBD

March

8 CMSM New Leaders Workshop

31 Direct Care Assistance applications due

Message from the Executive Director

Long before I had heard of Covid-19, I found comfort in a well-known quote attributed to Julian of Norwich:

All shall be well, and all shall be well, and all manner of things shall be well.

These days, I and undoubtedly others have been feeling a special kinship with Julian because she, too, lived during a pandemic. From that vantage point, her assertion that “all shall be well” was rooted in the belief that “all” is in the hands of the God who loves us beyond measure.

Recently, however, I have been reflecting on these thoughts of Julian’s:

For there is a Force of Love moving through the universe that holds us fast and will never let us go.

This imagery is reassuring for so many aspects of our lives. For me, though, it relates in a profound way to our ministry at the National Religious Retirement Office. Certainly “Force of Love” best describes the senior sisters, brothers, and religious order priests whom we are privileged to serve. Inspired by love of God and neighbor, their prayer, witness, and ministry have transformed countless lives.

As the weeks of working remotely have turned into months, I think this same Force of Love has allowed us to find creative ways to sustain our mission. With a little help from technology and a lot from the Holy Spirit, we are continuing our educational and financial programs—including Direct Care Assistance, which represents the bulk of funding distributions. Our wonderful consultants are finding innovative ways to provide virtual support

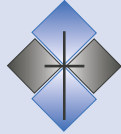
to communities striving to address retirement and eldercare concerns. And I am sure that Sister Anna Marie and the Trinitarians can testify that a Force of Love blessed their property-planning efforts. (See feature story on page 1.)

Soon, parishes across the United States will be holding the annual Retirement Fund for Religious collection, the proceeds of which underwrite all the work of our office. With many parishioners unable to attend Mass in person because of Covid-19 precautions, we are certainly concerned about this year’s appeal. Yet for more than 30 years, Catholics across the country have responded with thankful generosity to the retirement needs of religious communities—a tangible sign of love that is at once humbling and inspiring. So, even as I ask for your support and prayers for the collection, I trust that, indeed, *all shall be well*.

God bless,

Sister Stephanie Still, PBVM





National Religious Retirement Office

Sponsor of the Retirement Fund for Religious

**3211 Fourth Street NE
Washington DC 20017-1194**

Phone (202) 541-3215

Fax (202) 541-3053

Email retirement@usccb.org

Websites

usccb.org/nrro

retiredreligious.org

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.

Staff

Executive Director

Sister Stephanie Still, PBVM

sstill@usccb.org

Grants Specialist

Monica Glover

mglover@usccb.org

Education and Outreach Manager

Sister Georgette Lehmoth, OSF

glehmuth@usccb.org

Program Associate

Karen Cañas

kcanas@usccb.org

Adjunct Staff

Sister Anna Marie Tag, RSM

NRROConsult-AMTag@usccb.org

Ms. Dayna Larson-Hurst

NRROConsult-DLHurst@usccb.org

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.

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