

Retirement Fund for Religious

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News

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What to Do with This Old House?

In the long-running television series “This Old House,” a team of building experts restores historic homes to their former glory. Over the course of several episodes, deteriorating old houses are transformed into modern manors. The show highlights some of the particular challenges involved with renovating dated structures, such as asbestos or lead-based paint hazards. Yet the magic of television tends to mask the reality that the most challenging work often occurs long before hammer meets nail. Careful planning is the key to success. Nowhere is this more true than for religious communities trying to determine the best use of their outdated congregational properties.

Property management is among the most complex issues facing religious communities today. Decisions regarding congregational properties, particularly motherhouses, never exist in isolation. Rather, they are intricately entwined with a religious institute’s mission, ministry, finances, and elder care.

The challenges related to property management and/or divestment vary widely and are too numerous to enumerate; yet certain problems, such as handicap-accessibility issues or high maintenance costs, are consistently encountered. Often, motherhouses are sprawling structures built in the late 19th or early 20th centuries and designed to meet the basic housing needs of women and men religious in

Erected in 1935, the motherhouse for the Sisters of St. Dominic in Blauvelt, New York, is beautiful but not suited to today’s needs.



These motherhouse photos, provided by participants of the Planning and Implementation Assistance program, highlight the common challenges religious communities face when it comes to property planning and divestment. Designed for another era, these extremely large, single-use properties are expensive to maintain, hard to sell, and often even harder to renovate. Long, narrow hallways, steep stairwells, and poor lighting pose numerous obstacles for handicap accessibility, while bedrooms and bathrooms are ill-equipped for senior members.



Sisters of St. Joseph of Chambéry, West Hartford, Connecticut



Monastery of St. Gertrude, Cottonwood, Idaho



Servants of Mary, Omaha, Nebraska



Daughters of St. Paul, Boston, Massachusetts

What to Do with This Old House?, continued

their twenties. Hallways are long; doorframes are narrow; stairwells are steep; and safety issues abound, especially for those who are elderly. In today's market, these single-use buildings are a hard sale because they cannot be easily converted for other purposes or activities. Yet renovating them to meet the current needs of aging members is an extremely costly undertaking.

And, of course, motherhouses are much more than a bed and breakfast. Like any cherished home, they are places filled with memories and history. So, in addition to the numerous practical considerations involved with property management or divestment, religious communities must also come to terms with the emotional impact of selling or renovating treasured buildings.

More than half of the religious communities involved in the National Religious Retirement Office (NRRO) Planning and Implementation Assistance process are addressing property-related issues. Since the program was launched in 2009, some forty communities have received over \$6 million in financial support, as well as extensive consultative assistance. These communities know all too well that resolving difficult property issues is a time-consuming, labor-intensive process, requiring them to navigate a highly complex series of architectural, financial, legal, and municipal challenges.

Planning and Implementation Assistance provides eligible religious communities with the guidance and resources necessary to understand the myriad factors that could potentially impact their property-management goals. Participants complete a comprehensive analysis of their finances and member needs while evaluating the ways in which congregational properties support mission, ministry, and elder care. They also research the costs of renovation versus new construction, potential legal or municipal complications related to the properties, and the types of professional expertise needed to move forward.

As part of the property-planning process, participants are encouraged to develop and define a philosophy of aging that outlines how, when, and where retirement and elder care will take place. In so doing, they must consider whether or not the current method of elder-care delivery is safe and viable for the long-term. New models of care and possibilities for collaborative solutions must be investigated.

Top 10 Property-Planning Tips

1. Understand the role the property plays in supporting members, mission, and ministry.
2. Move beyond emotional attachment. Buildings are bricks and mortar; religious communities are people.
3. Do the math. Know total project costs, ongoing maintenance expenses, and the payback period.
4. Count heads. Compile current census numbers and obtain reliable demographic projections for the future.
5. Size it right. Know how much space will be needed in five years, ten years, fifteen years. If possible, structure adaptive re-use into the project plans.
6. Get help. Determine the specific types of expertise needed and look for professionals who have experience assisting religious communities.
7. Stay true to mission. Do not initiate a ministry for which your religious community does not have the skills or expertise simply to fill or save a building.
8. Expect dissent. Maintain open lines of communication, but do not let consensus building bring progress to a halt.
9. Remember, "green" is good, but it can put your finances in the red! Some buildings cannot be renovated, and the wrecking ball may be the best answer.
10. Develop a transition plan. Provide elder members with emotional support and practical help for moving day and the weeks and months to follow.

What to Do with This Old House?, continued

Significant among all these tasks is the necessity to make educated predictions regarding ongoing income, expenses, and health-care needs. To facilitate this process, NRRO recommends the use of TRENDS,* a forecasting model developed by the Resource Center for Religious Institutes. Accurately understanding current and future needs is central to the ability to “right-size” a project—that is, to develop a plan that not only addresses the immediate requirements of the community but also accommodates changing needs and resources over time.

Most religious communities enter Planning and Implementation Assistance with a broad understanding of the issues that must be addressed. Guidance from NRRO staff and volunteer consultants enables participants to hone in on their most pressing issues and to begin to develop strategies for addressing them. Monthly status calls ensure that planning stays on course. These calls also help to identify potential challenges early, so they can be addressed in a proactive rather than reactive manner.

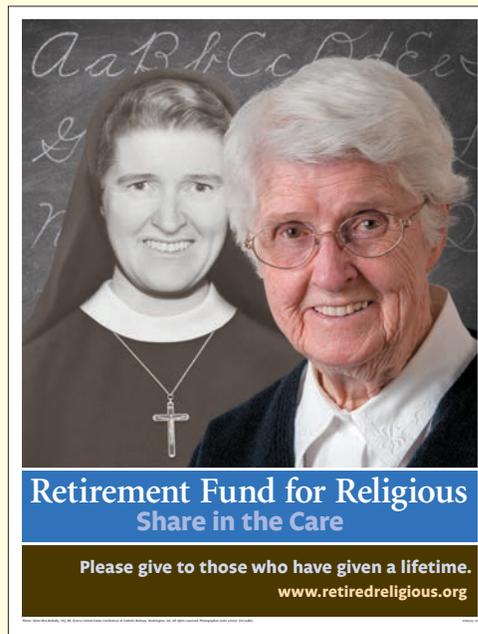
NRRO staff and consultants offer participating communities their professional expertise as well as the practical tips and insights gained from years of helping religious institutes address property-related issues. They can, for example, share strategies to help the leadership team communicate the progress of the project and build consensus about future directions. They can also furnish support when difficult decisions must be made.

Perhaps most importantly, participants in Planning and Implementation Assistance learn that effective property management can only take place within a framework that clearly incorporates the mission, ministry, and core values of the religious community. In the end, religious communities that are successful in addressing their property challenges come to understand that buildings exist to support the people inside—and not the other way around!

*TRENDS: Tracking Revenue, Expense, Net Assets, Demographics, Savings

Retirement Fund for Religious National Collection December 8–9, 2012

Please pray for the success of the annual appeal and for the intentions of our donors, who generously **Share in the Care** each year.



Sister Rita McNally, 88, a Sister of St. Joseph of Chambéry, is featured on the 2012 Retirement Fund for Religious (RFR) campaign materials. RFR funding has enabled her religious community to complete the Planning and Implementation Assistance process and to find new solutions to their property and elder-care challenges.

NRRO Calendar

December 2012

10–13 CMSM New Leaders' Workshop
(NRRO presentation is December 10.)
Washington, DC

12 Orientation for new NRRO consultants
Baltimore, MD

January 2013

2 Direct Care Assistance applications mailed

February 2013

1–3 NRRO Planning and Implementation Workshop
San Antonio, TX

March 2013

20–21 Workshop, *Through Grief to New Life:
A Spirituality for Meeting God in Transition Times*
Irvine, CA

Message from the Executive Director

As Thanksgiving approaches, our thoughts turn to hearth and home. Many of us will be traveling long distances to be with family, maybe even celebrating the day in the home of our childhood. We will indulge in the tastes and traditions of the past, sharing favored family recipes and recalling happy memories of days gone by. And we will remember those who are no longer at table with us and give thanks for those who are.

For most women and men religious, home is the motherhouse (or central house) of the community; and, as with any childhood home, it is a place full of memories, history, and tradition. Like me, most religious literally entered their vocation through the motherhouse front door. Memories of the motherhouse, then, are intricately linked to our identity. Just as we “grew up” in our family homes, we grew into religious life in our communities’ motherhouses.

Yet, as highlighted in our feature article, these “homes”—once filled with postulants and novices who could climb three flights of stairs without a

second thought—no longer meet the needs of thousands of elder religious. Today, many religious communities are facing the same kinds of decisions as “empty-nester” parents, namely, the need to downsize and find housing more suited to the demands of aging bodies. Relocation is a challenge for anyone, but for religious communities, it can be a particularly complex and arduous process.



Over the years, the NRRO has assisted numerous religious communities with both property divestment and the transition to new models of elder-care delivery. In this process, some of the most successful communities are those that have been able to let go of the emotional attachment to the motherhouse and recognize that the identity of their community lies in the members and not in a building.

In the end, on Thanksgiving—and every other day—it is the people gathered around the table that matter and not where the table is located. When I count my blessings this year, I will be thinking of all those who make the Retirement Fund for Religious possible. Your generosity and support enables us to assist numerous religious communities in ensuring a place at table for their elder members. May God bless you abundantly, and, as we approach the holy seasons of Advent and Christmas, may your homes be filled with grace and peace.

Gratefully,

Sister Janice Bader, CPPS

Announcements and Reminders

Go Green

To receive this newsletter electronically, please contact us at retirement@usccb.org to have your e-mail address added to our distribution list.

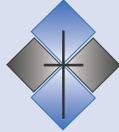
Stay Connected

Please send changes in address, phone, e-mail, or congregational leadership to NRRO, c/o Tiffany Lezama (tlezama@usccb.org), so that we may keep our records and mailing lists updated.

Bequests

If you would like to make a bequest or restricted gift to the National Religious Retirement Office, please use the following language:

To the United States Conference of Catholic Bishops Incorporated for the exclusive purpose of assisting Roman Catholic religious orders in the United States to provide for the retirement needs of their elderly members.



National Religious Retirement Office

Sponsor of the Retirement Fund for Religious

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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 reality and to plan for the future.

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