

## On the Path to a Sustainable Future



Numerous religious institutes rely on the buildings and land they have acquired as the foundation for their financial futures. On the plus side, these properties,

many purchased fifty, seventy-five, or even one-hundred years ago, have appreciated tremendously in value. On the downside, maintenance costs continue to escalate, while the ability of these aging facilities to meet community needs, especially for aging and infirm members, diminishes almost daily.

Determining how to make the best use of these significant assets is a time-consuming, labor-intensive endeavor that often takes years to complete. Undertaking the property planning process forces communities to deal with legal, architectural, tax, and municipal issues that are not part of the training for religious life. Congregations must also consider how their properties relate to and impact their overall mission and charism. Successful management of this process is often intricately linked to a religious institute's ability to care for aging and infirm members. Difficult decisions usually have to be made: build or renovate, leave or stay, give care or accept care.

Recognizing the need to help religious communities tackle the myriad challenges associated with managing their most important financial assets, NRRO developed a workshop on property planning. A committee of NRRO and professional consultants with experience in property planning and eldercare worked with the NRRO staff to create targeted programming for the three-day event.

*Property Planning for Religious Institutes* was held November 28-30, 2007. More than 160 religious and lay participants from congregations across the country attended the workshop. Financial assistance from NRRO allowed religious communities in need to take advantage of the conference, which was held at the Conference Center at the Maritime Institute in Baltimore, MD.



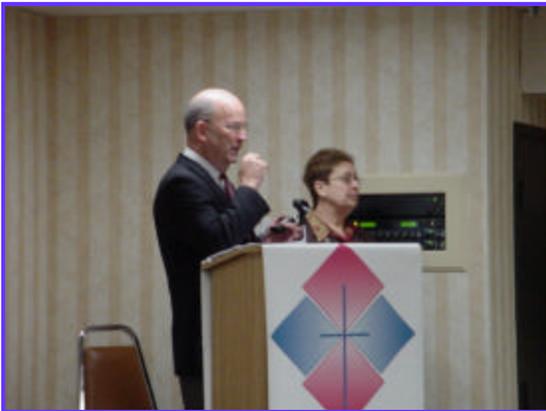
Participants at the workshop

The gathering furnished information, resources, and strategies to assist religious institutes in preparing effectively for their current and future facility needs, particularly as they relate to caring for aging and infirm members. The format rotated among theoretical discussions of the planning process, presentations by experts, and real life case studies.

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The initial framework for the planning process was addressed in the beginning of the conference. Sister Kathleen Kalinowski, OSB, a member of the planning committee, furnished an overview of the planning process as related to congregational concerns. She stressed that all planning must start with mission. She defined the key components of planning as internal and external communication, a proactive approach and consultation. Sister Rita Kraemer, OSF, also a member of the planning committee, addressed elements of project management, again underscoring its relationship to mission and charisma.



Gerard Hempstead and Sister Fran Raia

Later in the conference, a session was conducted on how to assess various property options. Sister Fran Raia, CPPS, project coordinator for the renovation of her community's 150 year old motherhouse and development of thirty-two adjoining acres, and Gerard Hempstead, a lawyer working with the community, outlined how to analyze potential revenues from property holdings. They discussed the nuts and bolts of such planning tools as a market feasibility study, Requests for Proposals, and facilities' analysis. They also described evaluating care options for aging and infirm members.

Throughout the conference, members of religious institutes who had successfully addressed their property planning challenges provided practical examples of how to navigate various fiscal and facility issues. They also



Participants at the workshop

provided insight into the emotional impact of making major changes to congregational properties, particularly motherhouses.

The case studies highlighted the role that mission and ministry play in the choices religious institutes make. For example, Sister Ellen Carr, OSF, shared how their efforts to make the best use of their spacious but sorely outdated motherhouse led them to partner with a non-profit organization. The end result has allowed the Sisters of St. Francis of Assisi in Baltimore, MD, not only to care for their infirm and well-elderly members, but also to advance their core mission of service to low-income, inner-city residents.

Various experts provided participants with up-to-date information on topics related to property planning for religious and eldercare. Michael Holtz, President of Architectural Energy Corporation, presented tips for sustainable design strategies and stressed the importance of building "green." Robin Eggert, Co-Founder of the REALM Consulting Group, discussed trends in senior housing and eldercare, including facts and figures on assisted living, skilled care, and Medicaid/Medicare. And Margaret Calkins, Ph.D., a widely-recognized expert in the creation and evaluation of long-term care settings, particularly for people with dementia, presented the concept of Resident Directed Care. She underscored the growing shift towards a more home-like setting for residents.

Survey responses to the event were extremely positive. Participants commented again and again on how helpful and informative the case studies were. They were pleased with the materials provided, especially the workshop booklet which contained copies of each presentation, space for notes, a glossary of terms discussed, and a list of individuals and resources available to assist religious institutes with their property planning efforts. Attendees also appreciated the daily masses and the time allocated for prayer and fellowship.

Many participants were encouraged by what they had seen and heard. One concluded, "This has been a great workshop! Thank you for helping us ask the right questions, foresee possible alternatives, and prevent serious errors by presenting real experiences."

## **Property Planning Workshop II**

*Are You Interested?*



We are considering hosting a second Property Planning Workshop, but we want to be sure there is sufficient interest. If you would like to attend, please contact our database manager, Monica Glover, at [mglover@usccb.org](mailto:mglover@usccb.org).

Please include your institute name and mailing address to help us determine the most central location. Thanks!



### **Message from the Executive Director**

As I write this article, it is a beautiful spring-like day here in Washington, D.C. I am reminded of the exuberant words of poet e.e. cummings in his work *Three Poems*: "**I thank You God for most this amazing day.**"

This day, I am amazed not only by the anticipated beauty of springtime, an expectation heightened by the daffodils and tulips beginning to peek from the ground, but also by the generosity of those who continue to support the Retirement Fund for Religious (RFR).

In the past nineteen years, Catholics have contributed over a half billion dollars to support our elder religious. Now *that* is truly amazing! Yet in June 2006, the United States Conference of Catholic Bishops approved an extension of the collection for another ten years. Their decision was largely based on the estimated \$7 billion shortfall in retirement funding for religious. With the unprecedented generosity shown the RFR over the years, it may be difficult to understand how there could still be such a significant gap between need and funding.

Though this is a complex, multi-faceted problem, the abridged answer is that health care costs continue to rise, we all continue to age, and many of us are blessed with a longer life than was projected twenty years ago. The issues facing religious institutes are, in one sense, a harbinger of the challenge that will soon be facing Social Security and Medicare. Costs are rising, people are living longer, and benefits are being distributed at a rate greater than that of contributions to the reserves. Religious have reached the peak of the bell curve somewhat earlier than the baby boomers in our nation, but the underlying issues are similar.

The forecast may seem gloomy, but even in this, there is still an “amazing day.” The RFR has had far greater impact than may appear evident when looking solely at the projected funding deficit. Religious institutes have used the funds wisely, both to meet their immediate needs and also to engage in comprehensive, long-range financial planning. As such, numerous communities have made significant progress in reducing their unfunded retirement liability. Others are decreasing the shortfall more gradually but still have a working strategy.

In the past several years, NRRO has been placing more emphasis on providing tools to address the underlying fiscal issues. Through workshops, consultations, and educational materials, we have sought to empower religious institutes with the knowledge, resources, and hopefully, confidence, to take charge of their financial futures. The property planning workshop featured in this edition is an excellent example of these efforts. While less than one cent of every donor dollar has been dedicated to educational activities, we believe the return on that investment will result in more “amazing days.” As we plan for the next ten years, we will continue to seek ways to help religious institutes help themselves.

It is both affirming and humbling for religious to realize that our ministries could be capable of inspiring the kind of ongoing generosity that has been shown to the RFR. We remain deeply grateful to all who continue to respond with such munificence, and we remember you constantly before God. May you be blessed in this Pascal springtime with many, many “amazing days.”



*Sister Janice Baden, CPPS*



## Person-Centered Care Conference—Moving Forward

In the fall of 2006, NRRO co-hosted with Mather LifeWays Institute on Aging, a Person-Centered Care Conference in Chicago, Illinois. Person-centered care is an approach that respects the dignity and complexity of older adults by striving to furnish them with more autonomy in their daily activities and more input in their care options. The conference sessions were designed by Mather Lifeways, a not-for-profit organization based in Evanston, Illinois.

Participants from religious institutes around the country gathered to learn how to implement the person-centered care philosophy in their own environments. Conference organizers asked that each institute send two staff members who could commit to disseminating the information to the rest of their staff within six months. Participants also agreed to take part in all aspects of the conference evaluation process.

As a means of evaluating the effectiveness of the training, NRRO and Mather Lifeways have been

monitoring participants’ progress since the conference. Six-month follow-up surveys revealed that ninety percent of respondents found their staff’s care either “somewhat or much more person-centered” than before the training. Eighty percent reported that they were “likely” or “very likely” to implement the training on a long-term basis in their institutes.

Today, a total of 1,782 care workers across the country have been trained by conference attendees in at least one module of the person-centered care program. The result has been improved care for residents and a happier, more productive working environment for staff with little to no additional costs. In fact, the program has been so successful that tentative plans are underway to offer a second training conference this fall.

*If you or someone in your community is interested in attending, please contact Andrew Small, [asmall@matherlifeways.com](mailto:asmall@matherlifeways.com). In your e-mail, please include your mailing address, phone number, and your preferred training site: Baltimore, MD, or Chicago, IL.*



### Check This Out

NRRO has developed a planning manual and DVD to assist religious institutes in their planning efforts. Topics addressed in the DVD include: property utilization and elder care, partnering with lay colleagues, and new membership.

To learn more, please visit our website at [www.usccb.org/nrro](http://www.usccb.org/nrro). Click on "Resources" and then on "Planning Materials Order Form."

### Did You Know?

#### May is Older Americans Month



The theme for this year's celebration is "Working Together for Strong, Healthy, and Supportive Communities." The goal is to highlight various issues affecting older adults, including healthy lifestyles and short and long-term care options. The U.S. Administration on Aging encourages communities to join the efforts to "improve the health and well being of our Nation's older adults and pave the way for future generations."



For more information and to download materials, visit: [www.aoa.gov](http://www.aoa.gov)



*If you would like to make a bequest or restricted gift to the National Religious Retirement Office, the following information should be used:*

To the United 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.

*Please send changes in address, phone, E-mail or congregational leadership to NRRO c/o Jean Smith so that we may keep our records and mailing lists updated.*

*Thank You!*



#### NRRO

3211 4<sup>th</sup> Street, NE  
Washington, DC 20017-1194  
Phone: 202-541-3215  
FAX: 020-541-3053

[www.retiredreligious.org](http://www.retiredreligious.org)

or

[www.usccb.org/nrro](http://www.usccb.org/nrro)

Executive Director

Sister Janice Bader, CPPS

[jbader@usccb.org](mailto:jbader@usccb.org)

Associate Director

Br. Henry M. Sammon, FMS, JCL

[hsammon@usccb.org](mailto:hsammon@usccb.org)

Database Administrator

Monica Glover

[mglover@usccb.org](mailto:mglover@usccb.org)

Staff Assistant

Jean Smith

[jsmith@usccb.org](mailto:jsmith@usccb.org)

## CALENDAR

(Arch)Diocesan RFR Collection Proceeds <i>Due in Office</i>	March 31, 2008
Basic Grant Eligibility Forms <i>Postmark Deadline</i>	March 31, 2008
Special Assistance Grant Applications <i>Due in Office</i>	March 31, 2008
NRRO Management Board Meeting	April 11, 2008
Supplemental Grant Applications <i>Due in Office</i> (for December Cycle)	April 15, 2008
NRRO Planning Meeting	May 5-7, 2008
National Catholic Development Conference, "Fundamentals and More" Workshop	May 20-22, 2008
Grant Awards Distributed	June 2008
NATRI Orientation to Financial Management Workshop, Plymouth, MI	June 2-6, 2008

RETURN SERVICE REQUESTED

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National Religious Retirement Office  
3211 4<sup>th</sup> Street N.E.  
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