

# Retirement Fund for Religious

Sponsored by the  
National Religious Retirement Office



Spring 2019  
Volume 32  
No. 2

## News

### NRRO Eldercare Consultations: The Inside Scoop

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In addition to the team in Washington, the National Religious Retirement Office (NRRO) has two adjunct staff members who take the NRRO mission on the road. Sister Anna Marie Tag, a member of the Sisters of Mercy, Mid-Atlantic Community, oversees the NRRO's eldercare consultation program. Dayna Larson-Hurst develops educational opportunities related to retirement and eldercare concerns.

Both also serve as NRRO consultants, providing hands-on support to religious communities with various challenges. Their extensive and wide-ranging experience offers them an insider's understanding of the NRRO's eldercare consultation process. Here they share why it can be a crucial step in retirement planning.



Sister Anna Marie Tag, RSM

#### Can you please give us an overview of a typical eldercare consultation?

**Sister Anna Marie:** Each community is paired with one or two NRRO volunteer consultants. All eldercare consultants have a background in health-care administration, nursing, or social work. Each brings different experiences and perspectives, and we try to match those skill sets with a community's expressed needs. Consultants make a two- or three-day, on-site visit. Depending on the community's situation, they may analyze anything from care delivery to demographic and financial data. The visit includes a high-level facility assessment, as related to the needs of the elders, and short interviews with residents and staff. Consultants compile their findings and send a final report to the community and the NRRO.

#### Why should an eldercare consultation be part of the overall retirement planning process?

**Sister Anna Marie:** Eldercare does not exist in a vacuum. Property, finances, staffing, ministries, and the physical and emotional well-being of members—regardless of age—all come into play when a religious institute is planning for retirement. Reviewing these factors helps a community better evaluate their viability and their ongoing ability to provide adequate care and support.

**Dayna:** I think what communities really want to know is what are our possibilities and our options. It's impossible to predict these options without first assessing the current state of affairs. That is, what is working and what could maybe be enhanced. An eldercare consultation puts relevant issues on the table and helps a community determine how best to focus their energies and resources.



Dayna Larson-Hurst

## NRRO Eldercare Consultations: The Inside Scoop, continued

### What do you wish more communities understood about the process?

**Sister Anna Marie:** Eldercare is not just about providing skilled or assisted care. Those levels of care are important, but the need for support and services, such as housekeeping or transportation, begins much earlier and often increases incrementally. I wish communities understood that it is never too early or too late to address retirement and eldercare needs. Starting the process is critical, although it may feel overwhelming. It may not be possible to solve every challenge, but tackling even a few will make a difference. An eldercare consultation helps communities identify which issues are most urgent.

**Dayna:** I agree. You just have to start. As I always tell communities, not making decisions is making a decision. A consultation brings a community's realities into focus. Often, it provides leadership with the momentum necessary to help the congregation move forward. While there may be challenges, a consult provides an opportunity to consider new care options and to have a say in what those options will be.

Both in the workshops that I help the NRRO develop and in my own experience working with communities, I find that most religious are looking for practical assistance. Often, they just don't know where to begin. In my workshops and consultations, I always include material on resources that communities can easily access—from information on person-centered care to low-cost safety enhancements. I also make sure communities are aware of various programs and tools sponsored by organizations that serve religious institutes, especially those offered by the NRRO.

### What are some surprises or benefits that communities find upon completing the process?

**Sister Anna Marie:** I think a common perception is that retirement planning focuses on loss: downsizing, selling property, closing infirmaries, or discontinuing beloved ministries. But effective planning helps religious institutes to reshape the conversation so that decisions, even painful ones, can be part of a larger mission to ensure charism and ministries can be sustained in new ways. I think congregations are reassured to discover how an outside, unbiased observer can help in reframing member care. Once they have a plan for the present reality, they can, perhaps, imagine a legacy for the future.

**Dayna:** What I see time and again is how relieved community members are once a decision is finally made, even if that decision is not what they had originally envisioned. There is a lot of peace in having a plan.

*Left:* Dayna Larson-Hurst is a frequent workshop presenter, particularly on topics related to wellness for elders.



*Above:* As adjunct staff members, Sister Anna Marie Tag (left), RSM, and Dayna Larson-Hurst collaborate on NRRO programming initiatives that enhance eldercare delivery.

## Message from the Executive Director

As with so many issues in life, satisfaction with retirement planning is often a matter of perspective. Is the glass half empty or half full? In our feature article, Sister Anna Marie notes that planning need not focus solely on downsizing and loss. Yes, current realities must be defined and accepted, and traditional approaches to community living and member care may have to change. Yet, with the right outlook, these decisions can be life giving.

A key to viewing change in a positive light is how we approach the planning process. It is tempting to jump in feet first and focus on what appears to be most pressing—whether that be finances, property management, or eldercare delivery. But doing so forgoes an important opportunity to frame decisions in light of congregational charism and mission. In my opinion, retirement planning is most successful when it begins with mission and with an understanding of an institute's history and its charism today.

Our congregational histories often include stories of founders and later generations reassessing mission in order to meet the needs of day. As religious, our vows call us daily to the possibility of conversion and

transformation. It cannot be denied that hard choices must be made. Yet, with mission as the starting point, these decisions can be framed and accepted as a means for renewal. Although expressions of mission may change, new ones will emerge.

If we can learn to view retirement planning as an opportunity rather than an end, we will discover the Holy Spirit not only blessing our journey but helping us to bless others along the way.

May your glass always runneth over!

Sister Stephanie Still, PBVM



### In Memory

**Sister Mary Ann Leahy, SP**  
1935–2019

Former National Religious Retirement Office (NRRO) Director Sister Mary Ann Leahy passed away on April 30.

A member of the Sisters of Providence of Saint Mary-of-the Woods, Indiana, she served at the NRRO from June 1997 to May 2000. Sister Mary brought with her a wealth of experience in development and fund-raising. During her tenure at the NRRO, she implemented initiatives to raise the profile of the annual Retirement Fund for Religious collection and to shed light on the needs of senior religious and their communities. The NRRO staff expresses deep thanksgiving for her contributions to our mission. Our prayers remain with Sister Mary, her community, and her loved ones.



### NRRO Calendar

#### May

**20** Retirement Needs Analysis mailed  
(Return corrections by May 31)

#### June

**11–14** USCCB Spring General Assembly, Baltimore, MD

**24–28** Direct Care Assistance checks mailed

#### July

**8** NRRO Assistance Review Committee meeting

#### August

**6–8** CMSM Assembly, San Antonio, TX

**13–16** LCWR Assembly, Scottsdale, AZ

**20** NRRO webinar: Topic TBD



# 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](mailto:retirement@usccb.org)

Websites:

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

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

## Staff

**Executive Director**

**Sister Stephanie Still, PBVM**

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

**Grants Administrator**

**Monica Glover**

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

**Administrative Assistant**

**Karen Cañas**

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

**Adjunct Staff**

**Sister Anna Marie Tag, RSM**

[NRROConsult-AMTag@usccb.org](mailto:NRROConsult-AMTag@usccb.org)

**Ms. Dayna Larson-Hurst**

[NRROConsult-DLHurst@usccb.org](mailto: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](mailto:kcanas@usccb.org)), so that we may keep our records and mailing lists updated.

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 US to embrace their current retirement realities and to plan for the future.

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National Religious Retirement Office  
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Washington DC 20017-1194  
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