2020 RCRI Virtual Conference

Joy of the Gospel: Path for Renewal in Uncertain Times

12:00 noon - 4:00 PM (ET)
Friday, October 23, 2020
Friday, October 30, 2020
Friday, November 6, 2020
WELCOME TO THE 2020 VIRTUAL CONFERENCE!!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, I welcome you to the 2020 virtual Conference. Though different from our in-person conferences, we look forward to an enriching conference experience as RCRI begins a new decade of service.

We have developed a program of 18 workshop/webinars for the virtual experience with topics that we hope will assist you in addressing the financial and legal issues facing your institutes, especially during these uncertain times. This year’s conference theme is *Joy of the Gospel: A Path for Renewal in Uncertain Times* reflecting the joy and newness of the Gospel. Pope Francis urges us in *New Wine in New Wineskins* “to not have fear of making changes according to the law of the Gospel...leave aside fleeting structures - they are not necessary...and get new wineskins, those of the Gospel.” He goes on to say that “one can fully live the Gospel only in a joyous heart and in a renewed heart” (page 31).

Fifty-five years ago this October, the Decree on the Renewal of Religious Life, *Perfectae caritatis* was approved by the Second Vatican Council. The document calls religious and the entire Church to adaptation and renewal of religious life based on a return to the spirit of the founders in the light of the signs of the times. Today, some 55 years later, while remaining steadfast in faith in Jesus Christ, in the joy and truth of the Gospel, religious institutes continue to respond to this call for renewal in 2020 in light of the signs of the times.

We welcome you to the 2020 virtual conference and look forward to sharing this time with you.

Sincerely,

Sr. Sharon Euart, RSM
Executive Director
2020 RCRI Virtual Conference

Friday, October 23

12:00 pm to 1:00 pm - Exhibit Hall

1:00 pm - Opening and Prayer

**Session 1 - 1:15 pm to 2:15 pm**


2. Balancing data and dialogue when making decisions about properties and ministries - Bethany Jaeger

3. Pandemic Online Security Lessons Learned - Tom Drez

2:15 pm to 3:00 pm - Break and Exhibit Hall

**Session 2 - 3:00 pm to 4:00 pm**

4. Faith Based Investing in a Time of Climate Crisis: The Promise of *Laudato Si* - Beth Collins, Lauren Compere & Bryan Pini

5. United States Conference of Catholic Bishops Group Exemption Overview and Recent Tax Developments - Madeline Obler


4:00 pm to 5:00 pm - Exhibit Hall

Friday, October 30

12:00 pm to 1:00 pm - Exhibit Hall

1:00 pm - Prayer

**Session 3 - 1:15 pm to 2:15 pm**


2:15 pm to 3:00 pm - Break and Exhibit Hall

Session 4 - 3:00 pm to 4:00 pm

10. New Governance Challenges and Opportunities - Mark Chopko & Jennifer Gniady

11. Impact Investing: A way to address Class, Race and Gender Inequity - Mary Bruce Alford, Sr. Corinne Florek, OP, Jeannine Jacokes, Carla Mannings & Sarah Smith

12. Maintaining a Legacy of Marygrove College: A Case Study - Dr. Elizabeth Burns & Sr. Mary Jane Herb, IHM

4:00 pm to 5:00 pm - Exhibit Hall

Friday, November 6

12:00 pm to 1:00 pm - Exhibit Hall

1:00 pm - Prayer

Session 5 - 1:15 pm to 2:15 pm

13. Legal Risks when Institutes Combine Across Borders - Kenneth Alderfer, Miriam Foley and Mark MacDougall

14. Legacy Planning Utilizing Facility Assessments and Master Planning - Tomas Jaster, Shane Larsen & Sr. Leticia De Jesus Rodriguez, CCVI

15. Catholic Impact Investing through a Private Markets Portfolio - Tim Dolezel, Sr. Suzanne Brennan, CSC Tom Lanctot & Jackie Rantanen

2:15 pm to 3:00 pm - Break and Exhibit Hall

Session 6 - 3:00 pm to 4:00 pm

16. Integration and Orientation for Foreign-Born Religious Workers in R-1 status - Miguel Naranjo & Leya Speasmaker


18. Faith & Finance: How to be a more effective active owner across asset classes - John Geissinger, Hoa Quach & Julie Tanner

4:00 pm to 5:00 pm - Exhibit Hall
Webinar Descriptions

Friday, October 23
Session 1 - 1:15 pm to 2:15 pm

   This legal update on employment law will discuss the complexities of COVID-19 on the religious institute as an employer, and provide the latest EEOC technical guidance in this area. This workshop will provide advice regarding new developments in light of the pandemic, and the application of these laws to the workplace. It will also discuss a variety of topics relevant to the religious institute, including, Title VII and the application of Title VII’s exemptions and the ever-evolving “ministerial exception.” Lastly, legal and practical tips will be provided to help the religious institute prepare for, and defend against, employment matters before and after they arise.

2. Balancing data and dialogue when making decisions about properties and ministries - Bethany Jaeger
   There is no common, accepted standard or benchmark used by individual religious institutes or by national religious organizations to define the point at which a Motherhouse or other major property should be vacated and/or sold. Similarly, there is no checklist a religious institute can apply to know exactly when it is time to divest of a sponsored ministry. No metric can compassionately consider Sisters’ quality of spiritual or community lives. This virtual workshop will discuss how Leadership Teams and Finance Offices can work together to consider metrics and indicators on one hand, and dialogue and discernment with membership and ministries on the other. Workshop participants will receive handouts that include general frameworks for evaluating property stewardship and for evaluating the sustainability of a religious institute’s relationship with its sponsored ministries to support such dialogue.

3. Pandemic Online Security Lessons Learned - Tom Drez
   The pandemic forced everyone online very quickly, religious institutes, churches, businesses, employees, and consumers. Some were prepared well to function in an online environment, some were not. This session will highlight aspects of a high-functioning, secure, online environment and explore some lessons learned including remote working, consumption of online services (e.g. Zoom), and more.

Session 2 - 3:00 pm to 4:00 pm

4. Faith Based Investing in a Time of Climate Crisis: The Promise of Laudato Si - Beth Collins, Lauren Compere & Bryan Pini
   In his encyclical, *Laudato Si*, Pope Francis calls all of us to consider our actions, including our financial decisions, which have an impact on the planet. As Christians, we are united by the concern for our planet, and especially the poorest and most vulnerable. The panel will explore how we can best align our investable assets in a way that honors the Pope’s call. Expert panelists will discuss how frameworks like the UN’s Sustainable Development Goals provide guidance to investors, how Catholic institutions are integrating concern for the climate in their investment decisions and
how we can use our voice as asset owners to improve financial and sustainability performance.

5. United States Conference of Catholic Bishops Group Exemption Overview and Recent Tax Developments - Madeline Obler
This session will go over the United States Conference of Catholic Bishop's IRS Group Exemption and the Official Catholic Directory, including what it means to be part of the USCCB's group exemption, how to apply for inclusion, and ways to modify current listings. This session will also go over recent tax developments relevant to religious organizations.

With the Covid-19 pandemic the way our lives “have always been” is no longer. While this has caused huge challenges it also gives us an opportunity to step back and learn how we might want to live and support our elders a bit differently. Many of you have learned that communication can be challenging and disruption to routines can cause struggles. Experiencing what it is like to live with others day-to-day without the normal outlets of recreation, socializing, and ministry has been a challenge for many communities. Those with cognitive and physical decline are special concerns. Noticing the need for increased services, new uses of technology or new ways to make best use of the physical plant has forced us to be creative. This workshop will raise questions for you to ponder and potential answers that you may want to consider as your community learns new ways of being together as you age.

Friday, October 30
Session 3 - 1:15 pm to 2:15 pm

Today many religious institutes are involved in planning for the future and, along with other issues, discerning what possibilities might exist for canonical governance in their institutes. For some the need may be more immediate than for others, nonetheless, it is not too soon to begin the conversation about the changing realities facing religious today. During this workshop the panelists will discuss the decision-making process, advantages and challenges of the options chosen, learnings from the experience, and offer suggestions and resources for those planning for the future.

Pope Francis wrote in is Apostolic Letter You Are the Light of the World addressing the crimes of sexual abuse in the Church: “[W]e must continue to learn from the bitter lessons of past, looking with hope towards the future.” In light of the Pope’s call, the current climate in the United States, and the rapidly changing state laws regarding statutes of limitations, it is critical for both female and male religious institutes to know how to best address an allegation of abuse. This workshop will detail an overview of the steps that should be taken immediately following an allegation, the gathering of essential information, and pastorally responding to those who state they have been
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harmed. This workshop will also focus on locating applicable insurance and tendering claims to the insurance companies. Further, the workshop will discuss the protocol pertaining to working with civil legal counsel in analyzing legal issues, identifying witnesses, and the overall investigation and litigation plan. Special attention will be given to resolving these legal disputes through the mediation process. Finally, this session will show how “the bitter lessons of the past” should be the religious institute’s foundation for hope in the future.

You will hear a brief overview of the principles of development for fundraising for mission or retirement needs. How do development, finance and leadership work together to create a culture of stewardship and philanthropy? Who is responsible for cultivating donors? Asking for donations? Recording gifts? Thanking, communicating or interacting with donors? In light of donor privacy laws, learn what information can be shared by development with leadership. We will discuss ways leadership can assist the development efforts of your community.

Session 4 - 3:00 pm to 4:00 pm

10. New Governance Challenges and Opportunities - Mark Chopko & Jennifer Gniady
All organizations have governance challenges, including religious institutes. This workshop looks at the creative opportunities religious institutes have to design governance, particularly in using ministerial public juridic person forms to continue established ministries. We will address options to encourage the successful use of civil structures and increase lay participation, such as conveying religious intent and authority through civil legal documents, managing the shift in control from a religious institution to a lay board over time, training board members in both fiduciary duties and spiritual formation, and preparing to manage public expectations and obedience to church authority.

What does impact mean in an age of gender, race, and class inequity? This panel will explore how religious investors and Community Development Finance Institutions (CDFIs) can work together to influence conversations about diversity, equity, and inclusion given gospel values and the mission of Jesus. This workshop will provide thought provoking ideas about how each of us can address systemic classism, gender bias, and racism through investing and lending practices.

12. Maintaining a Legacy of Marygrove College: A Case Study - Dr. Elizabeth Burns & Sr. Mary Jane Herb, IHM
In 2019, amidst many challenges, Marygrove College in Detroit, which had been sponsored by the IHM Congregation for over 100 years, closed. The Marygrove Conservancy, a 501 c3 organization, was formed, focused on cradle to career education on the campus of Marygrove College. The IHM Congregation helped shape the vision and share in this death and resurrection story. Initial partners include the Detroit Public Schools, Kresge Foundation, University of Michigan and Starfish Family Services.
Friday, November 6
Session 5 - 1:15 pm to 2:15 pm

13. Legal Risks when Institutes Combine Across Borders - Kenneth Alderfer, Miriam Foley and Mark MacDougall
Planning for the continuation of ministry, in the face of changing demographics and leadership profiles, is an uncertain task. The process is complicated when reconfiguration crosses borders and leads to changes in direction and priorities. Frequently, these changes will impact the legal rights, status and assets of the communities in the United States. In truth, the rule of law - the protections afforded to religious institutions, enforcement of contracts, property rights and the availability of civil courts not marked by corruption - does not exist in much of the world. As U.S. religious institutes consider integration with foreign communities, even within the same congregation, the risk of exposure to foreign legal systems and governments can be substantial. The aim of this workshop is to define and discuss the civil tools that will allow religious institutes in the United States to understand and mitigate the risks that may attend consolidation with foreign communities. The first half of the workshop will address major risks that may arise when the legal interests of U.S. religious community are placed under foreign control. The second half of the workshop will involve the use of comprehensive fact patterns to prompt discussion among workshop participants. The fact patterns will be distributed to workshop participants with the conference materials and will be used to sponsor lively discussion of each case and to prompt questions from workshop participants.

14. Legacy Planning Utilizing Facility Assessments and Master Planning - Tomas Jaster, Shane Larsen & Sr. Leticia De Jesus Rodriguez, CCVI
Many religious communities have challenges balancing building and property needs while continuing to support legacy planning. This session will breakdown what facility assessments and master plans are and how they can prepare communities for the difficult decisions ahead. In addition, two case studies (Sisters of Charity of the Incarnate Word, Augustinians of the Assumption) will be discussed on how they navigated this process.

15. Catholic Impact Investing through a Private Markets Portfolio - Tim Dolezel, Sr. Suzanne Brennan, CSC, Tom Lanctot & Jackie Rantanen
Much of Catholic investing to date has been through exclusionary screens or “avoidance of evil” approaches. Today, however, there is growing interest in investing through inclusionary impact screens or “Intentional Doing of Good” approaches through private markets portfolios. Hear experts in the field discuss how to build a private markets portfolio with measurable impact while keeping a Catholic Ethical Lens.

Session 6 - 3:00 pm to 4:00 pm

16. Integration and Orientation for Foreign-Born Religious Workers in R-1 status - Miguel Naranjo & Leya Speasmaker
As the recruitment of foreign-born religious workers increases, integration into the American way of life as well as orientation to the U.S. immigration regulations should be the utmost priority for the religious leaders. In this workshop, we will discuss integration (opposed to assimilation) of the foreign-born religious workers and cover the key components of successful immigrant integration initiatives as well as tips to
implement them successfully in your community. We will then present materials that can serve as a basic orientation for foreign born religious workers when they arrive in the U.S. with an R-1 visa, such as how to obtain a social security number and driver’s license, identify important immigration documents, and avoid falling out of R-1 status.

17. **Know When to Hold Them, Know When to Fold Them** – Sr. Nancy Conway, CSJ, Todd Dvorak & Julie Heiberger

Many congregations face the daunting task of deciding what to do with their older buildings. While useful for decades, many are becoming obsolete and a burden for evolving congregations with decreasing memberships. We’ll explore the options available, including repurposing for continued use, assessing the market for sale, restoring for a different purpose or ministry, deconstructing responsibly, or preserving for historical purposes. Our presenters will share insights on how others have handled this situation.

18. **Faith & Finance: How to be a more effective active owner across asset classes** – John Geissinger, Hoa Quach & Julie Tanner

Our faith compels us to be active owners. How can Catholic organizations leverage their assets to influence and shape the policies and practices of the companies, projects and governments in which they invest? Whether your investments are in large cap, small cap, or international equity, fixed income, or other strategies, there are ways to get involved, bear witness and serve the common good. Panelists will:

- Identify the unique challenges and opportunities of various investment strategies to effect positive change
- Share examples and case studies of the ways leading asset managers, faith investors, and coalitions are engaging to tackle some of the greatest challenges facing the Church and the global community
- Provide tools and tips to engage across asset classes

**Speaker Bios**

**Michael A. Airdo** is a founding Member of Kopon Airdo, LLC. His practice focuses on the handling of complex civil litigation matters, including healthcare litigation, catastrophic injury claims, and cases involving not-for-profit entities, including educational facilities. He has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. Mr. Airdo has a wide array of experience in resolving matters through the alternative dispute resolution process. Michael is a frequent lecturer on topics related to his legal practice, including board governance and fiduciary liabilities and the legal and pastoral response of child-serving organizations to victims of childhood sexual abuse. He served on the Board of Trustees for the Village of Bartlett from 2001 to 2011 and Mayor of Bartlett from 2011 to 2013. Mr. Airdo serves as National Coordinating Counsel for the Christian Brothers Risk Pooling Trust and is civil legal counsel for the Resource Center for Religious Institutes. Mr. Airdo is a Member of the International Association of Defense Counsel and serves as Chair of the Alternative Dispute Resolution Committee and Midwest Regional Chair of the Membership Committee. He received both his undergraduate degree, summa cum laude, and his law degree, with honors, from DePaul University in Chicago.

**Kenneth Alderfer** is a tax attorney with Akin Gump Strauss Hauer & Feld LLP whose practice focuses primarily on providing tax and corporate advice to various types of nonprofit and other tax-exempt organizations. He also represents individuals and entities contributing to and/or engaging in transactions with tax-exempt organizations. Mr. Alderfer is a leading practitioner
on tax, corporate, and trust aspects of civil reconfigurations of religious orders and has represented a large number of religious institutes and congregations in the U.S., Canada, and Europe. Mr. Alderfer previously has presented at the national conference for the Resource Center for Religious Institutes and speaks regularly regarding governance for nonprofit organizations.

**Mary Bruce Alford** Vice President, Investor Relations for HOPE Enterprise, is responsible for managing relationships with investors and developing a diverse investor base. These funders and investors help fuel HOPE’s work to strengthen communities, build assets and improve lives in economically distressed areas of the Deep South. Mary Bruce has contributed to raising more than $50MM to support HOPE’s work and regularly communicates the impact and nature of HOPE’s work. Mary Bruce is an expert in grant writing for CDFI Fund applications, having worked on more than a dozen CDFI Fund applications, with a 90% success rate. Prior to joining HOPE, Mary Bruce spent ten years working for The Trust for Public Land as a Senior Research Associate and Southeast Field Manager. Mary Bruce serves as Vice President of the Cloud Forest School Foundation, holds a master’s from Mississippi State University and a B.A. from Sewanee: The University of the South.

**Sr. Janice Bader, CPPS** is the president of the Sisters of the Most Precious Blood from O’Fallon, MO, and she has served her community as Treasurer General and as Secretary General. She served at the National Religious Retirement Office from 1999-2016, first as Project Director of Retirement Services and then as Executive Director. Janice served on the boards of the NATRI and RCRI and as a member of the LCWR Finance Committee. Janice holds a master’s degree in business administration from Southern Illinois University at Edwardsville.

**Sr. Suzanne Brennan, CSC,** General Treasurer, Sisters of Holy Cross. Sr. Suzanne taught in Illinois and Indiana before entering various social service ministries. In South Bend, Indiana, she served at Northern Indiana Children’s Hospital; at Madison Center, where she worked for eight years as director of outpatient therapy; and at La Casa de Amistad as a youth counselor. Sr. Suzanne later served as president and CEO of Our Lady of Mercy Hospital in Cincinnati - a position she held for five years - and as president and CEO of Providence Hospital, Anchorage, Alaska. She ministered in various capacities in Utah, where she served as vice president of Holy Cross Hospital in Salt Lake City, and as president of Three Rivers Investments in Park City. In partnership with Catholic Community Services of Utah in Salt Lake City, she launched a business for area residents who were homeless, which prepared them to start their own small businesses. For 16 years, Sister Suzanne also held the position of director of Holy Cross Ministries in Salt Lake City. Sr. Suzanne was elected to her current role with the Congregation’s General Leadership Team in 2014. She graduated from Saint Mary’s College with a Bachelor of Arts and earned her Master of Social Work from Loyola University. She also earned a master’s degree in public administration and finance from Roosevelt University in Chicago.

**Dr. Elizabeth Burns, MD, MA.** Dr. Burns recently completed her term as the ninth President of Marygrove College in Detroit, MI. Prior to appointment as President, she served as Interim Provost at Marygrove. She retired in July 2015 as Associate Dean for Faculty and Clinical Affairs and Assistant Dean for Graduate Medical Education at Western Michigan University Homer Stryker M.D. School of Medicine in Kalamazoo, MI. Dr. Burns is magna cum laude graduate of Marygrove College. She has served in various leadership positions at a number of schools of medicine in Iowa, Illinois and North Dakota before settling in Michigan. Dr. Burns also founded and directed the UND National Center of Excellence in Women’s Health Region
VIII Demonstration Project. She served on several boards, including Marygrove College before her service in administration at the college.

**Mark E. Chopko** is a Partner and Chair of the Nonprofit & Religious Organizations practice group of Stradley, Ronon, Stevens & Young, LLP, in its Washington, D.C. office. He advises religious and nonprofit institutions across the United States and internationally on structural, risk management and avoidance issues, and defends them in complex litigation. In addition to his legal practice, Mr. Chopko is an Adjunct Professor of Law at Georgetown University. He is a graduate of the Cornell Law School. From 1987-2007, he was General Counsel, United States Conference of Catholic Bishops, Washington, DC. He has served the American Law Institute as an advisor on the recent Restatement of the Law, Charitable Nonprofit Organizations.

**Beth Collins**, Catholic Relief Services’ (CRS) Managing Director of Impact Investing, has structured and led CRS’s impact investing and innovative finance activities since their inception in 2015. A leading global humanitarian and development agency, CRS reaches over 130 million people across more than 110 countries. Beth oversees CRS’ impact investing strategy and serves as Chair of Azure Source Capital, LLC, a financing vehicle developed by CRS to expand communities’ access to water services in Latin America. She also leads CRS’ advocacy efforts on impact investing and social enterprise, having produced two Vatican Impact Investing Conferences and acting as Chair of the Caritas Internationalis Impact Investing & Social Enterprise Working Group. Beth holds a BA in International Studies from Miami University and an MBA in Finance from NYU.

**Lauren Compere**, Managing Director and Director of Shareowner Engagement- Boston Common Asset Management, Boston, MA [Moderator]. Lauren heads Boston Common’s shareowner engagement program. She has worked in the responsible investment industry for almost 30 years and has 18 years of experience in global responsible investing. She is a frequent speaker at industry conferences in the US, Europe, and Asia and a guest contributor to the Huffington Post. Ms. Compere sits on the Governing Board of the Interfaith Center on Corporate Responsibility (ICCR) and previously served as Treasurer. She also serves on the Business Ethics and Systemic Risk Committee for the International Corporate Governance Network (ICGN). Additionally, she sits on the board of Access to Nutrition Foundation and serves as the Chair of the Audit Committee. Ms. Compere was Co-Chair of the Emerging Markets Disclosure Project (EMDP) and co-lead for the EMDP Korean team (2009-2012).

**Sr. Nancy Conway, CSJ**, a native of Cleveland, entered the founding congregation there in 1966. Her educational background includes a Bachelor of Arts in Spanish, a Master of Science in Social Administration, and a Ph.D. in Organizational Development. Nancy’s ministry experience includes teaching at the high school level, social work (both in a hospital and at a women’s agency), and five years of service on the Cleveland Leadership Team. Nancy also has more than 30 years of experience in organizational consulting/facilitation. Most recently, she was a member of the Leadership Team of the Congregation of St. Joseph, a new institute formed from seven CSJ congregations in 2007. In that role she facilitated the Congregation’s movement regarding its buildings and properties across six states.

**Tim Dolezal** is an Investment Director for the University of Notre Dame, a senior member of the team responsible for investment of the University’s endowment, working capital, pension and life income assets of over $14 billion. Tim joined the Notre Dame Investment Office in 2002 and is responsible for the University’s $5.3 billion private equity program which includes investments in venture capital, growth equity, and leveraged buyouts on a global basis. Prior
to assuming his responsibilities in private equity, Mr. Dolezal oversaw Notre Dame’s public equity program. He holds a B.B.A. *summa cum laude* in Finance from the University of Notre Dame where he was selected Valedictorian of his graduating class. He is a CFA Charter holder. Tim serves on several non-profit boards including the Diocese of Fort Wayne South Bend and the Catholic Community Foundation of North East Indiana. Tim lives in South Bend, Indiana with his wife Kathleen and their six children.

**Tom Drez** is the Chief Information Officer, Chief Privacy Officer, Chief Security Officer and Managing Director of Information Technology Services for Christian Brothers Services (CBS), a Lasallian enterprise which serves Catholic institutions and organizations by administering and managing employee health benefit and retirement plans, religious health trusts and institutional risk management services. Tom joined CBS in 1987 to lead the ITS division. Information & Technology Services at CBS includes all information technology operations, software design and development, and education and proficiency. Tom holds a Bachelor of Arts degree in computer science from Lewis University in Romeoville, Illinois. He holds the designation of Certified Information Privacy Professional (CIPP) from the International Association of Privacy Professionals (IAPP), is Chairman of the Church Benefits Association’s Information Technology Group, and is a member of the Diocesan Information Systems Conference (DISC). Tom is also a member of the Lemont Lions Club providing community and humanitarian services to those in need, working at club, district and state level of Lions Clubs International.

**Todd Dvorak** AIA is Hoffman Planning, Design & Construction, Inc.’s Worship Market Leader and a project architect. Throughout his twenty-year career, Todd has worked with seven religious communities and sixteen churches across the country. Todd is a graduate of the University of Wisconsin-Milwaukee, where he earned both his Bachelor of Science in Architectural Studies and his Master’s in Architecture. While he boasts a diverse project portfolio, Todd has a passion for designing worship spaces. His Master’s thesis was titled “Built Theology: Analyzing Lutheran Church Architecture” and he has presented on church architecture multiple times. Todd has prepared and documented two preliminary reports and one full report for the National Register of Historic Places.

**Sr. Sharon Euart, RSM** is the Executive Director of the Resource Center for Religious Institutes. She is a member of the Sisters of Mercy of the Americas. She holds master’s degrees in liberal arts and in administration and supervision from Johns Hopkins University and a doctorate in canon law from the Catholic University of America in Washington, D.C. Sister Sharon previously served as Associate General Secretary for the United States Conference of Catholic Bishops, Executive Coordinator of the Canon Law Society of America and as a visiting lecturer in the School of Canon Law at The Catholic University of America. She currently serves as a consultant to the USCCB Committee on Clergy, Consecrated Life and Vocation. She is a past president of the Canon Law Society of America and 2015 recipient of its Role of Law Award.

**Sr. Corinne Florek, OP** for forty years as an Adrian Dominican Sister, has been working in the field of community economic development as a manager, educator, consultant, financial administrator and strategic planner. Sister Corinne’s work has focused on using capital innovatively to empower low-income people. Corinne received an MBA from the University of Notre Dame and has worked with a number of loan funds and nonprofits including the Mercy Partnership Fund, a community investment fund for the Sisters of Mercy which she directed for over 12 years and the Religious Communities Investment Fund, a collaborative fund sponsored by thirty Catholic women’s religious congregations, she directed for 13 years.
Corinne is currently the Portfolio Manager for the Adrian Dominican Sisters’ community investment program. Corinne was awarded the Ned Gramlich Lifetime Achievement Award from the Opportunity Finance Network in 2010 and the Community Impact Award from the Northern California Community Loan Fund in 2014.

**Miriam Foley** has a diverse corporate practice across a wide variety of industries. She represents both for-profit and non-profit organizations, including religious organizations, private foundations and public charities, on strategic planning and a broad range of corporate transactions, including, mergers and acquisitions, restructurings, private equity investments, debt financing transactions and joint ventures, as well as advising clients on general corporate and governance matters. Ms. Foley received her J.D. from New York University and her B.Soc.Sc. from University College Dublin. She sits on the board of Rockflower Partners, Inc., a New York nonprofit which operates globally to benefit women and girls.

**John Geissinger, CFA** is the Chief Investment Officer at CBIS, a Catholic, socially responsible investment manager with over $7 billion in assets under management. Mr. Geissinger is responsible for developing investment policies and programs that achieve the investment objectives of the organization and its investors. He is responsible the development of CBIS’ overall investment philosophy and direction, including ultimate responsibility for the manager-of-managers function. He is a member of the firm's Executive Committee. John brings 30 years of portfolio and risk management experience in prominent financial services firms. He was a partner with Hewitt EnnisKnupp (2012-2014), a provider of investment consulting to corporate and public pension plans, endowments, foundations and defined contribution plans.

**Jennifer Gniady** is Counsel in the Nonprofit and Religious Organizations practice group of Stradley, Ronon, Stevens, & Young, LLP. She has represented nonprofits continuously for more than a decade, advising them on tax-exempt regulations, governance issues, lobbying, and fundraising practices. She assists religious institutes in matters of governance, corporate structures, and trust formation. She has also worked with lay religious groups and religious associations on business transactions, tax-exempt regulatory guidance, and tax characterization of income. She is a graduate of Fordham University School of Law and clerked for the D.C. Court of Appeals before entering private practice in the Washington, D.C. area.

**Julie Heiberger** AIA NCARB LEED® AP, with more than 20 years of experience, has provided design and planning services to more than 20 religious orders throughout the United States. The Religious Market Leader and a senior project architect for Hoffman Planning, Design & Construction, Inc., Julie is a Leadership in Energy and Environmental Design (LEED®) Accredited Professional and a member of the American Institute of Architects, the Society of the Advancement of Gerontological Environments, and a National Council of Architecture Registration Boards certificate holder. She received her Master of Architecture, with an emphasis in Environmental Behavior, and her Bachelor of Science in Architectural Studies from the University of Wisconsin—Milwaukee, where she also spent time as an adjunct professor of architecture. Julie’s project experience includes two senior care facilities that have received national design recognition from DESIGN/Environments for Aging. An accomplished author and presenter, Julie has spoken at past RCRI National Conferences.

**(Mary) Jane Herb, IHM, PhD** Jane is currently serving in her second term as President of the Sisters, Servants of the Immaculate Heart of Mary in Monroe, MI. She is also the chairperson of the Marygrove Conservancy Board. Jane serves as president elect of LCWR and a member on the LCWR Finance and Audit Committee. She is also a member of RCRI’s
Board of Directors. Prior to congregational leadership, Jane was superintendent of Catholic schools in the Diocese of Albany, NY for fifteen years. Jane holds a doctorate in educational administration from Boston College and has served in various capacities within Catholic schools. Until recently, Jane was an adjunct professor in the Mary Ann Remick Catholic School Leadership program at the University of Notre Dame.

**Jeannine Jacokes** serves as Chief Executive Officer of Partners for the Common Good, which is a national Community Development Finance Institutions (CDFI) wholesale participation lender and owner of CapNexus, an online platform connects community development lenders, borrowers to capital sources. Jeannine concurrently serves as CEO of the Community Development Bankers Association, the national trade association of the community development banking industry. Jeannine previously served as a senior member of the management team at the U.S. Department of the Treasury's CDFI Fund and was formerly senior policy staff for the U.S. Senate Committee on Banking, Housing and Urban Affairs. She holds a master’s degree from the University of North Carolina at Chapel Hill and B.A. from Aquinas College. Jeannine serves on the Board of Directors of the CDFI Coalition; New Market Tax Credit Advisory Boards - Reinvestment Fund, AmCREF, and Waveland Ventures.

**Tomas Jaster** is an experienced Business Manager with a demonstrated history of working for Catholic Religious Orders. Skilled in Market Research, Management, Student Development, Organizational Development, Bookkeeping, and Social Media. Strong finance professional with an MBA focused on International and Domestic Business for the Assumptionists.

**Andrew Kopon Jr.** is a founding partner of Kopon Airdo, LLC. His practice focuses on the handling of complex civil litigation matters, including catastrophic injury and wrongful death cases. He has tried high profile cases and has argued in federal and state appellate courts and the Illinois Supreme Court. Mr. Kopon’s trial practice is in a variety of areas and includes product liability, professional malpractice, employment law and insurance coverage matters. He currently serves as National Counsel for a religious risk pooling trust that covers educational institutions, nursing homes and the missions of religious institutes. Mr. Kopon had the privilege of serving as the President of the International Association of Defense Counsel (IADC) in 2017-2018. Mr. Kopon is a charter member of the Leading Lawyers Network Advisory Board whose members are selected based upon their reputation and professional ethics. He has been named an Illinois Super Lawyer for 2019 and in multiple prior years. He is a former member of the Board of Trustees for Loyola Academy located in Wilmette, Illinois. Mr. Kopon was the 2018 honoree of the De La Salle Institute Founder’s Award.

**Colette Kopon** handles a range of complex civil litigation matters, including advising and defending clients in all aspects of employment disputes and litigation. Her trial practice also includes fire loss, product liability, personal injury, class actions, and insurance coverage matters, as well as internal investigations. Ms. Kopon represents clients in a variety of industries and not-for-profit ministries, including healthcare, education, retail, and insurance. Ms. Kopon is also a frequent speaker on topics related to her legal practice and has been named a Rising Star by Illinois Super Lawyers, as well as an Emerging Lawyer by Leading Lawyers. Previously, Ms. Kopon served as a judicial law clerk to the Honorable Virginia M. Kendall in the U.S. District Court for the Northern District of Illinois.

**Lyn Korte** graduated from Southern Illinois University at Carbondale with a Bachelor of Science degree, majoring in journalism with minors in economics and Spanish. She started
her career as an editor at a daily newspaper in southern Illinois before moving to Elsevier where she advanced over a 15-year tenure in publishing for professional healthcare associations from managing and editing journals to leading global marketing teams, developing strategies, and managing publishing business. Lyn moved to Wisconsin in 2014 to join the leadership team at ASQ (American Society for Quality), serving in several positions with the association. After leading an 18-month research and development program, she was named Executive Director of Organizational Solutions, leading the new product development and corporate relations functions among other areas. In 2017, she earned the Certified Association Executive (CAE) designation awarded by the American Society of Association Executives. Lyn joined Wisconsin Religious Collaborative as Executive Director in 2019 and works from her home office in Fox Lake, Wisconsin.

**Sr. Ann Lacour, MSC,** is a member of the Marianites of Holy Cross, an international congregation. She has served in the ministry of leadership in her congregation since 2007 and has held the role of Congregational Leader since 2012. She will be completing her second term in 2022. She has served in a variety of ministries including Superintendent of Schools for the Diocese of Alexandria, LA and as Director of Development for her Congregation as well as for Catholic Charities of New Orleans. Ann was appointed by the Holy See to serve as the Pontifical Commissary for the Sisters of the Most Holy Sacrament in 2015. Ann holds a Master’s in Theology from the University of St. Thomas and a Doctor of Humane Letters from the University of Holy Cross.

**Tom Lanctot** joined Catholic Investment Services as Chief Executive Officer in 2019 and has been a Trustee of CIS since its founding in 2014. He is a retired Partner of William Blair & Company, a global asset management and investment management firm, where he managed five fixed income business units serving institutional clients and originated and managed asset management relationships with major institutional investors, including large public employee pension funds. Before joining William Blair, Tom practiced law for 23 years at a major law firm, where he was a partner and chaired the firm’s largest department. Tom is a seasoned fiduciary, serving in leadership roles on the boards of CIS, the Vanguard Charitable Endowment Program, the Big Shoulders Fund, which supports Chicago’s inner-city Catholic schools, Illinois Institute of Technology (Vice Chair), Rush University Medical Center, the Chicago Botanic Garden, the CORE Foundation and the Forest Preserve Foundation. Tom is a graduate of The Law School of The University of Chicago. He attended the University of Pennsylvania and received his B.A. from Northwestern University.

**Shane Larsen** is a registered Architect and has been working with religious institutes across the United States for 10 years. He prides himself on open communication and leading large group brain-storming sessions. On several occasions he has led groups of 100+ attendees while integrating audience participation.

**Dayna Larson-Hurst** has worked in Catholic health care for over 20 years. As a leader and consultant, she has a passion for devising innovative ways to help congregations develop and implement strategic-change initiatives that lead to the creation of life-giving communities. Much of her work now is focused on both well-being as we age and working with congregations to implement person-directed care particularly for those with dementia. She is currently an adjunct staff member with the NRRO as well as a consultant for Catholic religious congregations throughout the United States. Dayna is a registered nurse with a BA in Business and a master’s degree in Organization Development.
Sr. Kathleen Lunsmann, IHM

As president of SOAR!, Sister Kathleen leads, manages and establishes a clear vision and direction for the organization and its staff. Sr. Kathleen has been with SOAR! since 2010. Prior to this, she served as the director of development of her own congregation, the Sisters, Servants of the Immaculate Heart of Mary in Scranton, Pennsylvania. Sr. Kathleen earned a master’s in public administration from the Wagner School of Public Service at New York University and has been involved in the ministry of fundraising for more than 20 years. Originally from New Jersey, Sister Kathleen enjoys everything about living in Washington, DC except the traffic.

Mark MacDougall

has been a partner in the Washington, D.C. office of Akin Gump Strauss Hauer & Feld, LLP since 1994. A former federal prosecutor, Mark is a fellow of the American College of Trial Lawyers and for more than a decade has provided pro bono trial representation to indigent defendants facing the death penalty in South Carolina. In addition to his trial work, Mark is a recognized authority on civil law as it relates to religious institutes. He is a regular speaker and contributor at programs sponsored by the Resource Center for Religious Institutes.

Carla Mannings

is the Chief Business Development Officer at Partners for the Common Good (PCG), where her primary responsibility is to serve in an executive leadership capacity for program and business development across PCG’s capital fundraising, lending, CapNexus platform, and other programmatic initiatives. Carla previously served as Relationship Manager for NeighborWorks America and Commercial Real Estate Loan Officer for Community Housing Capital. Carla also spent over 20 years in the banking industry, primarily with Wells Fargo Bank. She currently serves as a Board Member with National Disability Finance Coalition (Vice Chair), Opportunity Finance Network (OFN), and Loan Committee member with NCALL Loan Fund. Carla holds a Bachelor of Arts degree from Howard University and a Master of Business Administration from Brenau University.

Sr. Patricia McDermott, RSM

is a member of the Institute of the Sister of Mercy of the Americas. A native of Omaha, NE, Pat has served as president of the Institute since 2011, located in Silver Spring, MD. Prior to this role, Pat served in other leadership roles for the Sisters of Mercy. Pat’s background is in education and pastoral theology having taught both in secondary schools and higher education. Pat has served and benefited by serving on boards for the ministries of healthcare, education and social services.

Miguel Naranjo

is the Director of the Religious Immigration Services section of CLINIC. He leads a group of immigration attorneys who assist more than 170 archdioceses, dioceses and religious communities throughout the U.S. in bringing international priests, brothers, sisters, novices, seminarians and other religious workers into the U.S. to serve the church. Naranjo joined CLINIC in 2006 and has been practicing immigration law since 2002. He is a graduate of the University of Notre Dame and the University of Pittsburgh School of Law.

Sr. Mary Jo Nelson, OLVM

is a member of Our Lady of Victory Missionary Sisters, and currently serves as the president of her congregation. During her term she has led her congregation through an extensive planning process that is preparing them to move into a new way of being a community with a Commissary. She has been involved in LCWR for 20 years, and just recently ended her term on the National Board. She has extensive experience working with women’s religious congregations as a consultant and facilitator, as well as many years in service to her congregation in elected leadership, vocation and formation ministry, as well as mission integration. In addition to her ministry in and with religious congregations, she served in a variety of leadership roles in the Diocese of San Bernardino for many years,
including Director of Pastoral Planning and Chancellor. Sister Mary Jo earned her BA in inter-divisional studies from Regis University, an MA in Religious Education from the University of San Francisco, and an MA in Organization Development from Loyola University in Chicago. She is also a trained spiritual director.

Madeline Obler is Assistant General Counsel for the United States Conference of Catholic Bishops in Washington, D.C. Her primary responsibilities include administration and maintenance of the Conference’s group ruling and tax and corporate compliance for the Conference, including annual reporting requirements, political activity and lobbying, substantiation, disclosure, and reporting of charitable contributions, unrelated business income tax, entity choice, formation, and governance, grantmaking, income tax withholding, and other tax matters. Prior to joining the Conference, Ms. Obler was a tax associate with the law offices of Crowell & Moring LLP and Blank Rome LLP in Washington, D.C., where she practiced in a variety of tax matters related to exempt organizations, federal and state tax controversy, state and local tax, and corporate tax. Before that, Ms. Obler was a judicial law clerk to the Honorable John O. Colvin of the United States Tax Court. Ms. Obler currently serves as an adjunct professor at Georgetown University Law Center where she teaches Tax Research and Writing. Ms. Obler received her law degree magna cum laude from Elon University School of Law and her LL.M. in Taxation, with honors, from Georgetown University Law Center. She is a member of the bars of the District of Columbia and Maryland.

Bryan Pini, CFA, is the President and Chief Investment Officer of Mercy Investment Services, the asset management program for the Sisters of Mercy of the Americas and its ministries. Prior to joining in 2007, Bryan was the Treasurer and Chief Investment Officer of Saint Louis University. Previously, he served as the Director of Finance and Administration for the Jewish Federation of St. Louis and the Director of Treasury Services for the Sisters of Mercy Health System. Bryan holds a Bachelor of Science degree in Accounting from Bradley University and a Master of Business Administration degree in Finance from Washington University.

Hoa Quach, CFA, is a Managing Director with the Catholic Responsible Investments SM team. As a senior member of the team, she works directly with internal and external stakeholders and is responsible for manager due diligence and research, portfolio construction and evaluating risk, marketing and product development, and product management. Hoa brings over 25 years of experience in prominent consulting and asset management firms.

Jackie Rantanen, Head of Product Management, North America, is a Managing Director and the head of Hamilton Lane’s Product Management Group, where she has responsibility for the firm’s Specialized funds including secondaries, direct equity, direct credit, and multi-strategy. Jackie is also an Investment Committee member. Jackie began her career with Hamilton Lane on the Fund Investment Team, and she has held roles in Relationship Management, PR and Marketing. Prior to joining Hamilton Lane in 1997, Jackie was a Corporate Finance Analyst for Comcast Corporation. Previously, she was a member of the Chemical Division’s Financial Analysis Department for Sunoco, Inc. Jackie received an M.B.A. from Villanova University and a B.S. from Drexel University.

Sr. Leticia De Jesus Rodriguez, CCVI is a member of the sisters of Charity of the Incarnate Word since 1988. She has been in mission in Mexico, Zambia, Africa, and currently serves as the General Treasurer for the Congregation.
**Sarah Smith** is the Director of Mercy Partnership Fund, the global community investing program of Mercy Investment Services, the socially responsible asset management program for the Sisters of Mercy and its ministries. Sarah oversees a portfolio that includes below-market rate investments to 60 mission-driven organizations working on high social and environmental projects. Sarah has spent more than 30 years working in the community development field as a community organizer, housing developer, program administrator, strategic planner and impact fund manager. Prior to joining Mercy Investment Services, Sarah served as president and CEO of Community Development Ventures, Inc., a professional services consulting firm specializing in organizing community and economic development projects and related public policy initiatives for corporate, nonprofit and public sector clients. Sarah holds a bachelor’s degree from Boston College, a master's degree from George Washington University, and a master’s degree from the University of Missouri - St. Louis.

**Leya Speasmaker** serves as a Field Support Coordinator and Integration Program Manager for CLINIC. As a Field Support Coordinator, she provides training and consultation to organizations on program management and capacity building. As the Integration Program Manager, she coordinates CLINIC’s resources and technical support on integration within the CLINIC network. She is a graduate of the University of Virginia, where she earned a bachelor’s degree in English and a Master of Teaching degree. She is also a graduate of the University of Texas at Austin, where she earned master’s degrees in public affairs and Latin American studies. Prior to working at CLINIC, she taught English as a second language in Virginia, Ecuador and Texas, and she speaks Spanish.

**Sr. Stephanie Still, PBVM** is a Sister of the Presentation of the Blessed Virgin Mary, San Francisco. Earning her degrees and teaching credential from the University of California, Berkeley, led to fifteen years in high school education as a teacher and administrator. She was elected to the Congregation’s Council in 1998. Following that term, she served in various positions for the Congregation including Director of Vocations, Communicator, and Chair of the Community Support Trust. She has experience serving on boards, including Boards of Trustees for Presentation sponsored ministries, and Boards of Directors for SafeHouse, a residential program for prostituted women, and Vallombrosa Retreat Center. She was elected President of her congregation for a six-year term in 2010. She became the Executive Director of the National Religious Retirement Office in October 2016.

**Julie Tanner** joined CBIS in September 2002. She leads the development and implementation of CBIS’ Catholic Responsible Investments℠ Program and oversees the Catholic investment screening, engagement and proxy voting activities, to integrate Catholic Responsible Investments℠ into the investment process. In addition, she crafts substantive agreements and strategic initiatives with boards and senior management in order to positively influence corporations and their impact on society.

**Sr. Marlene Weisenbeck, FSPA** is a member of the Franciscan Sisters of Perpetual Adoration (FSPA), La Crosse, Wisconsin. She has served in several leadership roles pertaining to religious life, including general councilor (1988-1996) and president of her congregation (2002-2010), president of the National Conference of Vicars for Religious (1998-2000) and of the Leadership Conference of Women Religious (2009-2011). In recent years she has served as a consultant/facilitator on various questions and topics for numerous communities, including international congregations. Four of these congregations have been in the process of completion/fulfillment. Marlene’s academic degrees include a Ph.D. in Higher Education Administration and a J.C.L. in Canon Law.
CONFERENCE AND REGISTRATION INFORMATION


Registration Fees

RCRI Members $300
Non-Members $400

*RCRI members include all members and employees of religious institutes with paid 2020 membership in RCRI, not only the named representative.

Cancellation Policy

- For written cancellations before October 2nd, RCRI will refund 50% of the registration fee.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by registered attendee, naming his/her substitute.

EXHIBITOR INFORMATION

Event Sponsorship

RCRI is grateful to any organization that can sponsor any of the following opportunities:

- **Logo in Virtual Lobby** - Your logo with a clickable link to your company’s website will be prominently displayed in the lobby of the virtual environment which each attendee will visit in order to access the webinar sessions and exhibit hall for the Assembly.
- **Logo on Sponsor Acknowledgement Page of Registration Site** - Your logo with a clickable link to your company’s website will be prominently displayed on the sponsor acknowledgement page of the registration site which each attendee will visit to register for the Assembly. This is a great opportunity to drive attendees to your website and encourage them to learn more about your brand!
- **Logo on Week Before, Day Before, and Day Of Emails to Attendees** - Your logo will be displayed on the week before, day before, and day of emails sent to all registered attendees prior to the Assembly. These emails are viewed frequently as they contain important updates and access information for the virtual Assembly.
- **Session Sponsor with Logo** - Your logo will be displayed in the background of the webinar screen throughout the entirety of the session.
- **Session Sponsor with Video Message in Virtual Waiting Room** - Promote your company by providing a one-minute introduction video to be played in the virtual waiting room where attendees wait to enter sessions throughout the entirety of the conference.
- **Primary Exhibit Booth Placement** - If exhibiting, your company’s virtual exhibit booth will be placed in primary location in the virtual exhibit hall.

Please contact Sabrina Hidalgo, shidalgo@trcri.org or 301-589-8143 for more information.
Exhibit Information
See exhibitor materials on our website https://www.trcri.org/page/NC2020 for booth fees, registration forms, sponsorship opportunities and cancellation policy. You can also contact Nix Conference and Meeting Management at 314-645-1455 and mention the RCRI conference for more information. To assure inclusion of information in conference materials, please register by September 28, 2020.