Pre-Conference Workshop

9:00 – 12:00

2021 Law Update: Law in the Time of a New Supreme Court, New President, and a Post-Pandemic World – Michael Airdo & Colette Kopon

The civil legal landscape continues to become more complex for religious institutes. With each year, new statutes and cases draw new boundaries and distinctions that can impact all aspects of an institution’s operations. Religious institutes faced unique challenges in 2020, and 2021 is no different. From navigating the rollout of vaccines, to evolved employee expectations with respect to working remotely, all employers, including religious institutes, are continuing to chart unprecedented legal terrain. This workshop will focus on the practical implications of the latest employment guidance from courts and administrative agencies on topics ranging from the transition to a post-pandemic workplace, the latest wage and hour issues, and the ever-changing “ministerial exception.” In this Pre-Conference Workshop, the presenters will also provide an overview of topics that all religious institutes must be aware of, including the most common liability risks facing congregations today. This Pre-Conference Workshop will also provide the latest advice and best practices on sexual misconduct issues. It will provide attendees with an understanding of a myriad of topics, allowing them to engage more thoroughly in other workshops throughout the Conference.

Welcome and Prayer

2:00

Keynote Address - Sr. Helen Prejean, CSJ

As has happened from the earliest days of those who sought to follow Jesus of Nazareth, I, too, come before you to give witness to “what I have seen with my eyes and touched with my hands... the Word of life” (1 Jn:1:1). Unexpectedly, my witness to the life-changing power of Christ has happened in execution chambers – and in the sorrowful company of grieving murder victims’ families. When at last I woke up to the Gospel call to do justice, I moved into an African American inner-city project in New Orleans, and one day was invited to write to a Louisiana death row inmate, Patrick Sonnier. That first letter led to visits and
then to the experience that forever changed my life: I witnessed Pat’s death by electrocution, and that experience, distilled to its simplest form, is why I write books and travel the country, sharing my experience with my fellow citizens and people of faith (including two popes!) about the moral imperative to stop state torture and killing.

My latest book, *River of Fire*, is an account of how I woke up to the social Gospel. It recounts the seismic changes of Vatican II and how we nuns transformed our lives around its mandates. I hope to share it with you at a very reduced price when I come (thanks to a donor). Its last page is the first page of *Dead Man Walking*.

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**Workshop Session 1 – 3:30 – 5:00**

1. **Sharing Experiences & Lessons on Advancing Mission - Investor Advocates for Social Justice** – Mary Beth Gallagher, Sr. Margaret Mary Kimmins, OSF, Fr. John Koelle, OFM Cap & Melody Maravillas
   Many religious institutions are seeking to deepen the integration of their mission across their institution, including in the management of their assets. Panelists will share stories about their policies and practices for investing their institutional assets to align with mission goals, including climate justice, human rights and racial equity. From defining impact objectives to ensuring internal governance structures, such as investment guidelines, are fit for purpose, they will share how institutions can work collaboratively with their financial advisors to maximize financial goals and environmental and social impact.

2. **Re-imagining the Work Environment After Covid-19** – Mary Kessler
   Covid-19 has brought unprecedented human and organizational challenges. Dramatic changes have occurred in attitudes towards work and in the creation of "home" offices. Religious congregations now need to re-imagine the work and the workplace of the future. This workshop will examine how redesigned workplaces can ensure a productive and safe environment where staff can enjoy their work, collaborate with their colleagues and most of all, achieve the mission of the organization.

   In religious life, we are living in a time of deeply unsettling change. In particular, COVID-19 has had a significant impact on Religious Life now and into the future. With every change comes loss, and the need for healthy grieving and experiencing a new sense of hope. The journey from the pain of loss to hope requires we acknowledge what has happened and find ways to enable community members to support and minister to one another.

   Participants will learn:
   - How this past year has brought to the forefront the various issues of grief
   - How that grief impacts both the individual and the community
Have an understanding of the power of grief if unresolved
Ways to address grief issues with our elder members particularly related to Covid-19.

4. **“Sexual Misconduct”: Its Evolution in the Church and the Institute’s Obligations to Protect - Michael Airdo & Colette Kopon**
   In May of 2019, Pope Francis issued his motu proprio, *Vos Estis Lux Mundi*, or “You Are the Light of the World.” In it, the Holy Father sets forth “concrete and effective actions that involve everyone in the Church,” including men and women religious, must take to “prevent and combat these crimes” of sexual misconduct. This workshop will focus on the history and evolution of the sexual abuse crisis in the United States and the implications of these developments on religious institutes now in 2021. This workshop will discuss key provisions of Vatican documents, including the new definition of “vulnerable persons.” It will also focus on principles, standards, and best practices that must form a religious institute’s plan to prevent and respond to sexual misconduct and the growing expectation that those in the Church will protect all in their care. The presenters will draw on their litigation and front-line experiences to provide practical advice to those in leadership regarding how to address the more expansive umbrella of those all in the Church must protect. They will offer best practices and the latest applicable policies. This presentation is aimed at all in leadership who will attend the RCRI National Conference.

5. **Lessons Learned – Mary Foley**
   Covid prompted fear and limitations. Our response revealed creativity, insight, flexibility, passion and brilliance. Are we making the most of these silver linings? What are the best new initiatives and directions for enhanced results? How do the signs of our times inform strategy to attract and retain increased philanthropic support? Donor cultivation, communication, planned giving and DAFs will be among the topics covered to provide you with new and refreshed opportunities for advancement.

Wednesday, October 27

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**Workshop Session 2 – 9:15 – 10:45**

   Pandemics and presidents come and go, but tax obligations persist even as religious institutes develop in new ways. We’ll look at collaborations and innovative corporate structures with an eye toward tax-exemption issues. Starting with a basic look at unrelated business income tax (UBIT),
we’ll apply the latest reporting guidance from the IRS to popular and novel structures. We’ll also discuss how structures in contracts and relationships can make tax issues simpler or more complex.

7. **Advanced Topics in Accounting – Sue Novak & Kellie Ray**
   This session will provide an overview of accounting pronouncements and issues, including:
   - New and Emerging Issues:
     - Paycheck Protection Program
     - Employer Tax Credits and Other CARES Act Programs
     - Leases
     - Revenue Recognition
     - Tax Filing Requirements
     - Other New Standards
   - Common Challenges (for example)
     - Contributed Use of Facilities
     - Lawsuit Liabilities
     - Alternative Investments
     - Charitable trusts
     - Key internal controls
     - Other
   The agenda will be modified to include relevant and new topics of interest.

8. **Being Faithful to the “Yes” of the Profession Commitment: The Evangelical Counsel (Vow) of Obedience – Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP**
   Every individual who makes religious profession takes on a life-long commitment to live intentionally the evangelical counsel of consecrated obedience. This asks the professed to accept the obligations of what it means to be a member within his/her institute. Such a commitment requires much personal, deep growth in spiritual life and maturity. The seminar will explore the scope of what consecrated obedience calls the individual to live into each day and the impact of the individual’s choices on the life of the institute. Practical applications will be part of the content of the presentation as well as how consecrated obedience fits with the other two evangelical counsels of consecrated chastity and consecrated poverty. The seminar’s primary focus will be an invitation to live religious profession, appropriately adapted to the given institute’s way of life, with vitality and witness.

9. **Child Exploitation Online: How Investors Can Help Stop It - Julie Tanner**
   Children are spending more time online, often with less parental supervision. Internet predators are escalating their activity to take advantage of that dynamic. This workshop will explore the critical role investors can play to help keep kids safe online, by engaging with technology and telecommunication providers. Participants will come away with tactics and strategies to hold these
companies accountable for eliminating child exploitation from their platforms and products, as Pope Francis urges us to do.

10. Fraud is Everywhere – How to Be Aware and Well Protected – Laurie Horvath, Ellen Labita, Kevin O’Connell, Krista Pankop & Timothy Schroeder
   We will share trending fraud examples and hold an interactive session presenting quick solutions to optimize protection for organizations. Our team will walk through before-and-after examples of enhanced accounting systems that have helped prevent against current fraud types without additional expense or employees. We will also talk about best practices for raising and discussing the risk of fraud with boards and other stakeholders. A guide with relevant examples will be shared with all participants.

11. Climate Change: Risks & Opportunities for Investments – Sr. Margaret Mary Cosgrove, BVM, Sr. Susan Hutches, OSB, & Jon Quigley
   The effects of climate change on people and the planet are evident and our responsibility is to protect the planet to continue to provide for all, particularly the poor and vulnerable. The impacts of climate change create new uncertainties that affect businesses and investors. This discussion will focus on how considerations of climate change can be incorporated into investment portfolios in order to reduce investment risk as well as create positive impacts on the environment.

12. The Progression of Cybersecurity Post-Pandemic – Tom Drez
   This session will compare and contrast cybersecurity -- individual and corporate -- before and after the pandemic. The pandemic caused every organization to send staff to work from home, raising the stakes for organizations to properly secure their systems, files, and data. Remote work, the pandemic and the presidential election, and its aftermath provided plenty of new material for bad actors to attempt to exploit us keeping the ransomware game alive and as dangerous as ever, in its latest evolution.

13. ADA and Interactive Process: Practical Guidance on How to Handle Employment Medical Issues – Andrew Kopon & Colette Kopon
   The Americans with Disabilities Act and state laws regarding an employer’s obligations with respect to employees’ medical conditions have been on the books for more than thirty years, but they continue to be a minefield for employers. This workshop will provide participants with nuts-and-bolts guidance on how to handle requests for accommodations, extended leaves of absences, and decisions with respect to termination. The goal of this presentation is to empower employers to
respond fairly to medical issues and engage in an interactive process with employees, while also moving their missions forward. Ms. Kopon and Mr. Kopon will draw on their litigation and front-line experiences to provide practical advice to participants. They will offer best practices and the latest applicable policies. This presentation is aimed at human resource professionals and other leadership who will attend the RCRI National Conference.

14. A New Day, a New Way: Creating or Revising Your Retirement Plan Since the Pandemic – Dayna Larson-Hurst, RN, MSOD & Sr. Susan Schorsten, HM
Covid-19 has made many of us rethink how we will support the members of our communities into the future. We will discuss many of the lessons that have been learned from this turbulent time and how those learnings may impact your planning. Through this interactive workshop, you will identify the basic elements of a retirement plan so that you can begin now to develop your plan.

Lessons from a lifetime of serving the persecuted church and other unrepresented people groups utilizing both aid and advocacy. Caroline will share examples from her work in Armenia, Myanmar, Syria, and Nigeria. Learn strategies for:
- Leveraging funds for maximum impact
- Empowering local partners
- Dovetailing with larger international aid organizations (rather than overlapping)
- Combining aid with advocacy (being a voice for the voiceless)

16. The Future of Transportation – a Periscope into the Future of Mobility – Adam Berger
Transportation has never evolved faster. Evolution is at our very core, yet the pace of change is more rapid than ever. How do you keep your community focused on sustainability, safety, and simultaneously mindful of cost while evolving? Learn about the future of vehicle transportation, the impact on safety, environment, and costs while we explore the path toward EVs. We will add clarity, insights, and measurable approaches to support your mission, vision, and values. Then we will deploy the periscope and show you how the vehicles of the future will operate. Seatbelts on!

17. COVID 19: Business Interruption and Income Loses – Stephen Waldorf
In this workshop, we will examine how COVID-19 has led to business interruption losses for religious orders. As a result of the pandemic and the related stay-at-home orders, many religious organizations have seen donations and fundraising activity plummet. Many of these orders may have little to no reserve funding, making survival tenuous. Some relief may be found through insurance or federal aid, but these avenues are not guaranteed. To stay strong in a post-COVID-19 world, new risk mitigation strategies are needed.
COVID-19 has revealed weaknesses in senior care including inadequate funding and staff and lack of preparedness. Congregational sponsors of senior care face these factors every day. Waiting too long to make important decisions can result in the loss of Catholic identity. This workshop explores the ethical issues of congregational sponsorship, offers examples of approaches that congregations have pursued to relieve the financial burdens, and creates a framework for congregations to decide and choose an alternative path.

19. Neuroscience and Spirituality of Self Compassion: Caring for Ourselves to Care for Others – Anne Kertz Kernion
Jesus’ command "Love your neighbor as yourself" implies that we love ourselves. But do we? Or are we harshly critical of our mistakes and imperfections? Our workshop will draw upon recent findings in neuroscience and psychology, illuminating self-care and spiritual practices that nurture gentleness, kindness and patience towards ourselves. Far from being self-centered or selfish, these practices also generate a deeper understanding of others, enhancing our church and community relationships. As a bonus, exercising self-compassion aids in reducing stress and inflammation while slowing aging in our cells and our brains. Particularly pertinent as we emerge from the pandemic, these lessons address physical and cognitive health over the lifespan. This multimedia presentation aims to be enjoyable as well as educational. This workshop is suitable for those new to self-compassion, but also those who would like to learn about the topic in more depth.

20. Collecting and Using Integration Data to Build Stronger Religious Communities – Leya Speasmaker
Fostering an inclusive community should be the utmost priority for the religious leaders who are in charge of caring for foreign-born religious workers. In this workshop, we will discuss the difference between integration and assimilation/acculturation and cover the key components of successful immigrant integration initiatives. We will detail how to collect important data that can enhance a currently operating integration program, and we will propose a plan of action for agencies interested in effectively engaging their religious community in integration efforts.

21. Investing with Care for Our Common Home – David Erickson, Sr. Teresa George, DC & Bryan Pini
This session will focus on the journey of two women’s religious orders to incorporate environmental considerations into their investment portfolios, informed by *Laudato Si’*. This discussion will include their evolution of thinking over time, the current state of the portfolio, and how they currently see their approaches evolving going forward. An advisor will moderate the session and add insights on
22. Workplace Violence...Hostile Workplace...Is Your Ministry Prepared – Jeff Harrison & Steve Wilder
This workshop will walk each attendee through a Security Preparedness Resource Toolkit and how to use it. The following topics and toolkit sections will be discussed:
- Assemble a planning team
- Security preparedness self-assessment
- Customized security inspection program
- Ongoing awareness training
- Review a variety of sample policies
- Implement, test and maintain your plan
- Thoughts on how to develop and run tabletop exercises.

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Session 5 - 4:00 – 5:30

This workshop will provide a summary of all the changes in government programs for 2021, with a look ahead to pending program changes in 2022. The discussion will include: Social Security, SSI, Medicare (A, B, C & D), Medicaid, QMB, SLMB, QI-1, the Low-Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP), as well as a discussion on the potential impact of legislation on benefit participation for members of religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order.
24. Emerging MPJPs for Education in the U.S. – Sr. Amy Hereford, CSJ
The workshop will discuss the transfer of sponsorship of educational ministries to a Ministerial
Public Juridic Person in the US, including:
- Fostering charism and Catholic Identity through sponsorship
- Civil and canonical principles involved
- The process and timeline for their formation
- Statutes and canonical approval
- Implementation and transition of sponsorship
- Cases study
- Roles and responsibilities

Gerotranscendence is a positive developmental theory that focuses on why continued growth and
development are important throughout life. During this workshop, we will discuss the key concepts
of this theory and the value of understanding its importance. We will also share practical
implications and how to implement the concepts of this theory in your community.

26. Faith Based Investing: Addressing Racial Equity and Inclusion – Lauren Compere, Sr. Lee Hogan,
CSJ, James Malone & Nichole Roman-Bhatty
Please join this panel of leading Catholic Investors and advisors who are driving conversations
addressing racial equity and inclusion. In the context of the extraordinary events of 2020, namely,
the dual impacts of the COVID-19 pandemic and the call to address systemic racism in the US, we
will discuss how these investors are working with Catholic organizations in addressing critical issues
as individuals, congregations, investors, and in partnerships.

27. That the Generation to Come Might Know: Navigating Generational Change in Society, Politics,
and Religious Communities – Tim Marchesi, David Rosen, Peg VanWagoner, Karen Watson & Sr.
Michelle Wronkowski, SSJ-TOSF
The core tenets and traditions of the Catholic Church may be enduring, but religious communities
know they must adapt to new social and cultural realities. A driving force behind these new realities
is generational change. This session will feature a panel discussion to:
- Provide an overview of the Howe and Strauss study on the four generational archetypes,
- Examine how these archetypes influence leadership and group dynamics,
• Provide political analysis of the U.S. Congress, regardless of party affiliation, and the impact on policy and regulation, and
• Offer practical advise on how to manage leadership as generational cohorts change over time.

28. Managing a Crisis: A Legal Perspective – Michael Airdo & Colette Kopon
When an emergency strikes or a crisis hits, like violence in the workplace, religious institutes need to be prepared at every level and they need to understand the legal implications of their preparation and response. Be it hostility on campus, a natural disaster, a catastrophic accident, employee misconduct, or scandalous allegations, all organizations must take proactive steps to be ready to mitigate reputational and financial harm that may arise from those unexpected events. The leaders of religious institutes must also focus on minimizing legal risks. This workshop will follow “Workplace Violence...Hostile Workplace...Is Your Ministry Prepared.” It will build on the lessons learned in that Workshop and concentrate on the legal issues that may arise when responding to a crisis. The presenters will draw on their litigation and front-line experiences to provide practical advice to those in leadership regarding how to best manage a crisis, including investigating the crisis, how to document and preserve evidence during the crisis, and how to minimize the legal ramifications in responding to media inquiries and communicating with constituents.

29. Philanthropic Development for Religious Institutes in Uncertain Times – Chad McEachern & Leslie Mollsen
In 2020, the needs of religious communities were greater than ever before. In 2020, donors rose to the occasion and demonstrated compassion and generosity. Many communities reported results that exceeded expectations. This workshop will address how communities can raise their fundraising potential even in uncertain times. Whether your community’s needs are related to funding retirement and healthcare, supporting mission, enhancing vocations, or ensuring legacy, donors want to help! And donors will help—join us to learn how.

Session 7 - 2:00 – 3:30

30. Implementing Cor orans: Challenges and Issues Facing Monasteries of Nuns - Sr. Nancy Bauer, OSB
It has been more than five years since Pope Francis issued the apostolic constitution Vultum Dei quaerere which addresses women’s contemplative life, and three years since the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life issued the instruction Cor orans on how to implement the new norms given in VDQ. This workshop will address challenges and issues that monasteries of nuns are encountering as they try to implement Cor orans. Topics will include, for example, the challenges of federating, the question of autonomy of federated monasteries, and issues regarding suppression of monasteries that have declined in membership. The workshop will
be helpful for major superiors of monasteries, presidents of federations, and anyone who is assisting a monastery of nuns in implementing *Cor orans*.

31. **A Case Study of Transformation: The Adrian Dominican Sisters’ Story** – Mark Boehlke, Julie Heiberger, Sr. Fran Nadolny, OP & Sr. Corrine Sanders, OP
   Is your congregation facing multiple facility and property challenges? Are you dealing with reduced membership and wondering how to maintain ministries? We’ll share the journey the Adrian Dominican Sisters took to plan for consolidating assets in a logical progression, reducing their carbon footprint, keeping the legacy of the land, and maintaining their campus ministry. They’ll describe how their planning efforts transform their campus and community to enable them to live more ecologically and economically.

32. **Religious Archives – Paths to Securing Your Legacy** – Doris Cardenas, Kathryn Oosterhuis & Lisa Schell
   Archival programs are often stuck in the void between a community’s need to address the pressing issues of the day and their fear of losing their legacy due to inaction. An investment in archives demonstrates the continuing impact a community can have both on its local community and the ongoing mission of the Catholic Church. The professional archivists assembled for this presentation address the challenges communities face in developing and supporting archival programs and provide three possible paths forward, meeting communities where they are. This panel is applicable for religious communities concerned with the preservation or final disposition of their archival holdings.

33. **Partnerships and Collaborations – Viable Strategic and Operational Solutions** – Craig Abbott & Erin Shvetzoff Hennessey
   The care and service of our aging constituents continues to be increasingly demanding and ever more complex. Potential partnerships, collaborations, or third-party support often becomes a strategic and operational solution to assist in efforts to most ably care for and serve those entrusted to our ministry. Whether it’s seeking consultation, third-party management, joint venture partnerships, or potential divestitures, there are many pitfalls to avoid. This session will explore the opportunities, challenges, and lessons learned when contemplating the services and support of external partners.

34. **Foreign Relations and Cross-Border Transactions by Religious Communities: What Could Possibly Go Wrong?** – Ken Alderfer, Miriam Foley & Mark MacDougall
   Cross-border integration provides opportunities for education, vocational development, and enrichment of ministry and spiritual life. At the same time, transactions with foreign affiliates can lead to legal and regulatory hazards that may not be obvious until trouble is already at the door. This interactive workshop will seek to address the legal and analytical tools that allow religious
institutes to anticipate and address the common risks associated with financial, corporate and civil transactions with foreign affiliates.

Session 8 - 2:00 – 3:30

35. Good Times? Religious Worker Immigration Law Updates – Miguel Naranjo
Will a new administration bring new, positive changes to religious worker immigration law? That is certainly the hope! This workshop will review the current status of the immigration laws, regulations, and policies affecting foreign-born religious workers in the U.S. We will review the R-1 Religious Worker Visa program and the challenges religious organization face when sponsoring a religious worker to serve in the U.S. We will examine the different immigration status options for religious who seek entry into the U.S. including those seeking permanent resident status.

36. Going Green – A Sustainable Transportation Plan – Cynthia Maves & Sr. Sharon Zayac, OP
A major source of greenhouse gas emissions for Religious Communities is generated from the operation of automobiles. To assist Communities in learning how to reduce the carbon footprint of their vehicle fleets, Caritas formed an advisory board comprised of environmental advocates and subject matter experts from the automotive industry to develop a report of recommendations that may be used as a guidebook to developing "green practices" for managing vehicles. Attendees will receive a copy of the report, and our guest speakers will answer questions such as, What can drivers do right now to help? What is the true cost of hybrid vs. electric vs. gas-powered vehicles? and How to estimate the carbon footprint of your vehicles?"

37. Bringing Laudato Si’ to Life - A First of Its Kind Collaboration – Sr. Patricia Daly, OP & Kristina Van Liew
As we look to respond to the Vatican’s launch of the 7-year plan to implement Laudato Si’, the impact of the climate crisis is ever clearer. Today, many Catholics are asking themselves anew how to live out the Pope’s urgent appeal “for a new dialogue about how we are shaping the future of our planet.” For religious congregations long involved in social and ecological issues, a growing edge for this discussion focuses on the management of their investment portfolios. This presentation will highlight the story of a group of US congregations of Dominican Sisters, who moved beyond dialogue to action, in bringing Laudato Si’ to life in their investments.

38. “Third-Agers,” Pre-tirement and Encore Ministries – Sr. Mary Pat Garvin, RSM
"Third Agers," those between the ages of 65-80, comprise a large percentage of members of religious institutes. This seminar will explore the growing appreciation that sociologists, psychologists, and theologians hold for this remarkable time of life. The innovative thinking behind
pre-tirement (rather than retirement!) and encore ministries will be considered as it relates to healthy aging. Finally, suggestions will be offered for empowering "Third Agers" to claim this stage of life as an irreplaceable gift not granted to everyone.

39. Sooner Rather Than Later: Preparing for the Institute’s Journey to Fulfillment – Sr. Marlene Weisenbeck, FSPA
The workshop will highlight various phases which are crucial to an institute’s well-being in the journey to the fulfillment of its mission. The speaker will emphasize the facilitator’s role in processing the spiritual sorrow, communicating internally with the members and externally with other appropriate stakeholders, transferring administrative services to non-members, executing the canonical and civil documents, and the role of a canonical consultant.
Craig Abbott has more than 25 years of health care management and consulting experience. He has provided leadership for communities ranging from small, rural nursing facilities to large, metropolitan continuing care retirement communities, and has worked with nationally renowned nonprofit and for-profit organizations and freestanding communities. Mr. Abbott has received industry recognition, including 50 for the Next 50 by LeadingAge Minnesota as an innovative and influential leader supporting older adult services, and the Volunteers of America Human Service Leadership Award for his development and implementation of subacute and transitional care initiatives. Mr. Abbott’s education includes an MBA from University of St. Thomas Center for Medical Affairs in Healthcare Management and Quality Management. Mr. Abbott has advised more than a dozen religious institutes throughout the country.

Michael Airdo is a founding Member of Kopon Airdo, LLC. His practice focuses on the handling of complex civil litigation matters, including healthcare litigation and catastrophic injury claims. He has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. He is a frequent lecturer on topics related to his legal practice, including the legal and pastoral response of child-serving organizations to victims of childhood sexual abuse. Mr. Airdo is a Member of the International Association of Defense Counsel and serves on the IADC Foundation Board of Directors. He received both his undergraduate degree, summa cum laude, and his law degree, with honors, from DePaul University.

Ken 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 many 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.

Sr. Nancy Bauer, OSB, JCD is a member and former prioress of the Sisters of Saint Benedict of Saint Benedict’s Monastery in St. Joseph, Minnesota. She holds a master’s degree in theology with an emphasis in monastic studies from the School of Theology at St. John’s University, Collegeville, Minnesota. She earned the licentiate and doctorate in canon law at The Catholic University of America in Washington, D.C. where she is a professor of canon law specializing in consecrated life.

Adam Berger serves as Shareholder & President of Doering Fleet Management and Doering’s electric vehicle leasing company, TESlease. He’s driven by improving situations and outcomes. Adam speaks on fleet topics and the future of fleet/technology at industry conferences regularly. Under his leadership, Doering Fleet Management was born and has grown to be a preeminent national fleet management company with offices around the Country. Interestingly, Doering Fleet Management was born at RCRI based on the needs of religious communities. Doering works with over three dozen communities within RCRI. Prior to his current role, Adam was the VP of Sales at Doering for 15 years, a Consultant with PricewaterhouseCoopers, and childhood entrepreneur. Adam attended Babson College in Boston, MA, graduating magna cum laude.
Mark Boehlke, ASLA/RLA is a Senior Project Manager with Hoffman Planning & Design. Mark has over 35 years of experience and has worked with more than 20 religious communities throughout the United States. He provides a primary point of client contact and team leadership. Mark’s expertise includes site evaluation, design, and approvals, as well as master planning for projects up to 4,000 acres, with an emphasis over the past 20 years in women religious and educational projects. A graduate of the University of Wisconsin-Madison with a Bachelor of Science in Landscape Architecture, Mark is a member of the American Society of Landscape Architects and has written multiple articles on the topic of site evaluation and selection.

Fr. Charles Bouchard, OP, S.T.D., is senior director, theology, and sponsorship at the Catholic Health Association of the United States (CHA). He counsels and assists sponsors and members of Public Juridic Persons (PJPs) in carrying out their canonical responsibilities for the health ministry of the Catholic Church and provides guidance for CEOs and boards regarding the distinctive roles of sponsorship and governance. He also works with Church leaders and bishops at the United States Conference of Catholic Bishops and at the Holy See on a range of issues involving health care, social justice, public policy and the Church. From 2015-2018, Fr. Bouchard served as CHA’s senior director, theology and ethics, where he supported the Catholic health ministry nationwide as an author, educator and consultant on the church’s theological and ethical teaching. Prior to joining CHA, Fr. Bouchard served as provincial of the Dominican Province of St. Albert the Great from 2011 to 2015; as vice president for theological education at Ascension Health from 2008 to 2011; and as president and associate professor of moral theology at Aquinas Institute of Theology in St. Louis for 18 years. He writes and lectures extensively on issues in health care, health care ethics, Catholic identity in sponsored institutions, and the intersection of political life, religion and faith. Recent publications include “Sponsors are Called to be Prophets and Reformers,” Health Progress (May-June 2019), and “Making Ministry Whole: How MJPs Could Transform the Church,” Commonweal (November 7, 2019). Fr. Bouchard entered the Dominicans in 1974 and was ordained in 1979. He completed doctoral studies in moral theology at The Catholic University of America in 1987. In 2018, he received “The Great Preacher Award” from the Aquinas Institute of Theology.

Doris Cardenas is the Associate Archivist for the Claretian Missionaries Archives USA-Canada Province. She has an M.L.I.S. from Dominican University with a specialization in Archives and Cultural Heritage Resources and Services. She is a member of various archival and library organizations such as the Society of American Archivists, Chicago Area Archivists, and the International Federation of Library Associations and Institutions. Presently, she is a Programming Co-Chair for the Chicago Area Archivists and serves of Dominican University’s Alumni Advisory Council.

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

**Sr. Margaret Mary Cosgrove, BVM** is a Director of Client Service & Sales for Great Lakes Advisors. She works to ensure that the firm provides superior service to all clients in all circumstances. In addition to her role with the firm, Margaret Mary also serves on several investment/stewardship committees for a university and religious congregation. Margaret Mary received her undergraduate degree from Mundelein College (now Loyola University, Chicago) and her MBA from the University of Iowa. Before joining the firm, Margaret Mary worked in the not-for-profit sector and in academics as a faculty member and Department Chair for both Clarke University and Loras College in Dubuque, Iowa. She also served as Treasurer and CFO for the Sisters of Charity for 12 years.

**Baroness Caroline Cox**, Member of the House of Lords, Founder and President of the Humanitarian Aid Relief Trust (“HART”). Baroness Caroline Cox combines both aid and advocacy to serve some of the world’s most unrepresented people groups, from Syria to South Sudan and beyond. A Life Peer of the House of Lords since 1982, a result of Margaret Thatcher’s nomination, she has served inter alia as the Baroness- in-Waiting to Queen Elizabeth II.

**Sr. Patricia Daly, OP** is a Dominican Sister of Caldwell, NJ and has worked in Corporate Responsibility and Socially Responsible Investing for over 40 years. After almost 24 years, Pat recently concluded her tenure as Executive Director of the Tri-State Coalition for Responsible Investment, an organization of 40 Roman Catholic Dioceses and Congregations of Women and Men primarily in the New York metropolitan area, a member of the Interfaith Center on Corporate Responsibility. Pat has invited companies to address issues of human rights, labor, ecological concerns, equality, and international debt and capital flows and played a role in positioning the agenda of global warming into the priorities of Corporate America. In addition to representing her Congregation before corporations, Pat serves on the Advisory Boards of Lamont Doherty Earth Observatory, the climate science arm of Columbia University’s Earth Institute, and Jana Partners, the first hedge fund to implement corporate engagement and socially responsible principles. Pat helped to launch the Dominican-initiated launch of the Climate Finance investment products that work to implement the U.N. Sustainable Development Goals. She is the proud recipient of the 2014 Joan Bavaria Award presented by Ceres and Trillium Asset Management, the2017 Legacy Award presented by ICCR, and holds honorary doctorates from William Paterson University and Duquesne University.

**Tom Drez** is Chief Information Officer, Chief Privacy Officer, Chief Security Officer and Managing Director of Information & Technology Services, Christian Brothers Services. Tom Drez joined Christian Brothers Services in 1987 to lead the CBS Information & Technology Services (ITS) division, which includes all information technology operations, software design and development, and education and proficiency. He is currently the chief information officer, chief privacy officer, chief security officer and managing director of information technology services. 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, Illinois Lions Club, providing community and humanitarian
services to those in need, working at the club, district and state levels of Lions Clubs International.

**David Erickson**, CFA As the Chief Investment Officer, Mr. Erickson is responsible for overseeing the administration, management and coordination of all investments, totaling approximately $50 billion, and has 29 years of investment industry experience. Prior to joining AIM in 2009, he served as Chief Investment Officer at the University of Wisconsin Foundation, Madison, Wisconsin, where he supervised an investment team that managed more than $2.2 billion in assets. He previously served as Vice President and Investment Strategist for Strong Capital Management in Wisconsin, and in leadership roles with PNC Bank/PNC Capital Markets in Pennsylvania, Chemical Bank in New York, and Firstar Bank in Wisconsin. Mr. Erickson holds a bachelor’s degree in economics from Wheaton College, Wheaton, Illinois. He is a CFA charter holder and a member of the CFA Institute and the CFA Society of St. Louis. He serves as a board member of the Henry J. Predolin Foundation, a family foundation supporting education, medical research, and the homeless.

**Br. Wayne J. Fitzpatrick, M.M., M.A, M.S, C-GCM**, Maryknoll Missioner, holds an M.A. Degree in Theology, Maryknoll School of Theology and an M.S. Degree in Pastoral Counseling, Loyola University of Maryland. He earned a Certificate in Geriatric Care Management from Misericordia University, Dallas, PA. He is also a member of the Planning Committee at Misericordia University, Dallas, Pa. for the annual Elder Religious and Diocesan Priests Workshops. Bro. Wayne is presently Director of Pastoral and Spiritual Life for the Maryknoll Fathers and Brothers. He also serves on the Leadership Team of the Maryknoll U.S. Regional Council.

**Mary Foley** is Managing Director, Mission Advancement/Catholic School Management, Christian Brothers Services. Mary J. Foley brings 35+ years of experience to the not-for-profit world and offers a wealth of strategic leadership skills and insights to the educational, religious and social service arenas. Mary has worked with hundreds of not-for-profits, internally as a director of development, at the board level, and through a wide variety of consulting engagements. She has raised hundreds of millions of dollars through capital campaigns, annual fund appeals and ever-expanding advancement initiatives for organizations large and small. Mary is a repeat presenter at schools, organizations and dioceses around the country, the Council for the Advancement and Support of Education, the Association of Fundraising Professionals, and the International Catholic Stewardship Conference. In 1992, Mary established Foley Consulting, Inc., to provide fundraising, marketing, organizational development and stewardship expertise so that FCI clients can better meet the needs of those they serve. After 25 years, FCI joined Christian Brothers Services to bring more resources and opportunities to their clients and ours. Mary serves as managing director of Catholic School Management and Mission Advancement at CBS. Mary is a lector in her parish, serves on the St. Giles School Development Committee and is a board member at Corazon a Corazon, Chicago.

**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.

**Sr. Barbara Jean Franklin, ASC** has been a vowed member of the Adorers of the Blood of Christ for 50+ years. She has Master’s Degrees in Education and Theology which she has applied in her ministry as an educator and administrator. She has served in leadership in her religious community and for the past 10 years has been administrator her community’s retirement center in Ruma, IL. During these 10 years she has been engaged with the staff in providing person-centered care to the sisters who reside at the Ruma Center. Together they continue to learn and implement new ways to make sure each sister has a rich and full life. Each encounter with a resident sister brings an opportunity to learn more about the grace of aging. Each sister is a mentor to her as she herself learns to navigate the journey into Living Mission in Later Life.

**Mary Beth Gallagher** is the Executive Director of Investor Advocates for Social Justice, which advocates on behalf of a community of investors whose faith-based values promote human rights, climate justice, racial equity and the common good. Mary Beth leads shareholder engagement and supports the Mission-Aligned Investing program, which helps faith-based investors integrate their mission and values into the investment decision-making process.

**Sr. Mary Pat Garvin, RSM, Ph.D.** is a member of the Institute of the Sisters of Mercy of the Americas. She holds a doctorate in psychology from the Pontifical Gregorian University in Rome, where she was on the faculty from 1994-2001. Since 2001, Sr. Mary Pat has taught psychology for Seton Hall University and worked with national and international conferences of Religious, as well as over 60 Religious congregations throughout North and South America, Europe, Africa, Asia, and Australia. In 2017 she received the Mary Emil Penet, IHM Award from the Religious Formation Conference in recognition for her contribution to the ministry of initial and ongoing formation for Religious in North America and internationally. Sr. Mary Pat served as a member of her congregation’s general leadership team from 2011-2017. She is a Fellow in Human Formation with Saint Luke Institute in Silver Spring, Maryland. Her research interest is the interplay of spirituality and psychology which promotes the healthy and holy living of Religious Life.

**Sr. Teresa George, DC** currently serves as Provincial Treasurer for the Province of St. Louise, where she sits on the Investment Committee. In addition, Sister Teresa serves on the board of several ministries sponsored by the Daughters of Charity Province of St. Louise. Prior to this role, Sr. Teresa served as the administrator for Daughters of Charity Ministries, Inc. in Albany, New York, and the Chief Operating Officer of Dell Children’s Medical Center of Central Texas. She has experience in both the financial and administrative areas. Sister Teresa has served on several community boards of directors and numerous health system boards and committees. Sr. Teresa received her Bachelor’s degree in Business Administration with a concentration in Accounting from Baylor University. She completed her Master’s degree in Pastoral Studies from Loyola University in New Orleans, LA, and her Master’s degree in Public Administration from New York University. Sr. Teresa is a Certified Public Accountant licensed in Texas.

**Jennifer A. 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, charitable compliance, 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, regulatory guidance, and managing litigation related to First Amendment issues. 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.

Jeff Harrison Dir. of Risk Control Services, Christian Brothers Services. Jeff Harrison is the Director of Risk Control Services for the Risk Management Division at Christian Brothers Services. Jeff develops online and field risk reduction programs and coordinates risk control services for over 1,100 members nationwide. He has over 25 years of experience in the field of risk management and has been with Christian Brothers Services for over 23 years. Jeff has obtained Certified Safety Professional (CSP) and Associate in Risk Management (ARM) designations and is currently a member of the American Society of Safety Engineers and the National Safety Council.

Julie Heiberger AIA NCARB LEED® AP, is the religious market leader and a senior project architect with Hoffman Planning, Design & Construction. With 20+ years of design experience, Julie has worked with more than 25 religious communities in all phases of services, from planning through design and construction. Skilled in facilitation and project management, Julie has guided many clients through thoughtful planning and programming efforts to arrive at solutions meeting their specific and unique needs. A respected resource in the religious community who specializes in the design and planning of women religious / senior care living environments, Julie has been invited to speak at several past RCRI National Conferences. A registered architect in Wisconsin, Julie holds accreditation through U.S. Green Building Council’s Leadership in Energy and Environmental Design (LEED®) program.

Sr. Amy Hereford, CSJ, JD, JCD is a Sister of St. Joseph. She has been in religious life for over 30 years and has served in a variety of ministries in education, administration, communication, vocation/formation, and community leadership. Sr. Amy has degrees in science, communication, and theology, as well as in civil and canon law. This background helps her to assist religious communities, and to help those who are making important choices about the future of their institutes. Beginning in teaching and communication, Sr. Amy then moved into management and administration and then into consulting. As a consultant and facilitator, she works with religious communities and with small to mid-sized charitable organizations across the US and beyond, especially in assisting organizations facing the challenges of an uncertain and changing future. She helps clients maximize their resources for the sake of their mission and to further organizational goals. In her work as a writer, speaker and retreat director she addresses technical concerns of religious institutes and explores the evolving nature of religious life itself. Sr. Amy has been admitted to practice in Missouri, Massachusetts and before the US Tax Court.

Sr. Lee Hogan, CSJ, President, Sisters of St. Joseph of Boston. Sister Lee received her M.A. in political science from Tufts University, a Doctor of Philosophy degree in government and politics from the University of Maryland, and completed the Higher Education Resource Services (HERS) Management Institute certificate. Full biography forthcoming.

Sr. Mary C. Hopkins, O.P., M.S. CRPS, CGT, holds a master’s degree in Pastoral Counseling/Spirituality from Loyola University. A certified Retirement Planning Specialist and Grief Counselor, Mary has extensive experience working as a geriatric and pastoral consultant with religious congregations and dioceses as well as preaching retreats. She is a co-planner of the Elder Religious and Diocesan Priests Workshop. For many years Mary was a member
of the Governing Council for the Forum on Religion, Spirituality and Aging with the American Society on Aging. Her past experience includes 10 years as Director of the Third Age Retirement Office of the Sinsinawa Dominican Sisters. She resides at the Sinsinawa Dominican Sisters Motherhouse in Wisconsin.

**Laurie Horvath, CPA** has more than 20 years of public accounting experience, including 12 years with an international firm with five in a national office role. As Baker Tilly’s healthcare and not-for-profit practice leader in Detroit, she specializes in providing auditing, accounting, and consulting services to not-for-profit and healthcare clients, including financial statement audits and single audits under OMB Uniform Guidance.

**Sr. Susan Hutchens, OSB**, was elected Prioress of St. Mary Monastery in June 2020. Sr. Susan earned a Bachelor of Mathematics from Saint Mary-of-the-Woods College, Indiana and taught Mathematics in the middle grades before entering the Sisters of St. Benedict. She received a Master’s in Theology from St. John’s University in Collegeville, Minnesota and taught Math and Religion at the Secondary level. Sr. Susan also did graduate work in Mathematics Education at Purdue University, Calumet campus and in Financial Administration at the University of Notre Dame. In 1988, Sr. Susan was appointed Treasurer of her community and continued to serve in that role, until her election as Prioress. Her professional background includes 17 years of teaching and 32 years as community Treasurer and Organist. For many years Sr. Susan served on the Finance Committee of the Federation of St. Benedict and was elected as President of the Federation of St. Benedict for the 2009-2015 term. In this position, she represented Benedictine Sisters who minister in 10 monasteries in the United States and its territory of Puerto Rico, in the Bahamas, Taiwan and Japan. Sr. Susan also served as a Financial Consultant for the National Association of Treasurers of Religious Institutes (now Resource Center for Religious Institutes, RCRI). She is a current member of RCRI as well as the Illinois Treasurers of Religious Institutes. Sr. Susan currently serves on the Finance Board of the Benedictine Sisters of Sacred Heart Monastery in Lisle, Illinois. Sr. Susan has a deep love of theology, Scripture, the Liturgy of the Hours, monastic history, and music, as well as a firm commitment to, and passion for the Benedictine monastic life.

**Sr. Lynn Jarrell, OSU, MA, JCD** is a member of the Ursuline Sisters of Louisville, Kentucky. She has a Doctorate in Canon Law from the Catholic University of America in 1985 and a Master’s in Communication from Western Kentucky University in 1974. Lynn has served as Vice-President (1992-1996) and President (2008-2014) of her Congregation. From 2005-2008, Lynn was the Associate Director for Canonical Affairs at the Resource Center of Religious Institutes (the predecessor of RCRI) in Silver Spring, Maryland. She has taught in various Schools of Theology, seminaries and other programs as a full-time faculty member, adjunct professor, or lecturer. She has contributed to canonical publications, either as author or editor. Lynn served full time in the Tribunals for the Diocese of Evansville, Indiana (1984-1988) and the Archdiocese of San Francisco, California (1997-2001). Lynn has served for seven years on the Board of the Canon Law Society of America as Consultant, Secretary, Vice President, President and Past President. Since 1984 Lynn has worked with the leadership of religious institutes and their national organizations in the United States and beyond, most recently in Canada, Zambia, and Austria. After finishing her term as President of her congregation she resumed this work full time, serving as consultant, facilitator, and presenter on a range of canonical and religious topics including presenting retreats on religious life, facilitation of leadership groups and chapters, and accompanying institutes through the planning.
and implementation process of coming to completion.

**Anne Kertz Kernion** (BS in Environmental Engineering, Penn State; MA in Theology, Duquesne University; Certificate in the Science of Happiness, UC Berkeley; Graduate certificate in Positive Psychology, U. of Missouri) is the owner/artist of Cards by Anne, an inspirational greeting card company founded in 1986. Her second book, *Spiritual Practices for the Brain*, was published in 2020 by Loyola Press. Her first book, *A Year of Spiritual Companionship* was published by SkyLight Paths in 2016. Anne’s cards are available online (cardsbyanne.com) and in hundreds of stores. For fourteen years, Anne taught “Cross-Cultural Understanding of Religious Meaning” at Carlow University. For seven years, she was also an adjunct professor at CCAC, teaching courses ranging from Chemistry, Environmental Science, and Nutrition to World Religions and Ethics. Currently, Anne is a frequent lecturer and retreat leader, presenting topics that combine neuroscience, positive psychology, and spirituality to Catholic schools, churches, religious communities, conference attendees, retreatants, and hospital staff throughout the US and Australia. She is also a certified yoga instructor and teaches a weekly Yoga class.

**Mary Kessler** has nearly 40 years of human resource experience in both Catholic Church and non-profit work environments. She has provided consultation services and management training in personnel/human resource administration for congregations of women and men religious, groups of new priest pastors and lay diocesan and parish managers. She co-presented a management training and diversity program for the United States Conference of Catholic Bishops and serves as a consultant for the National Association of Church Personnel Administrators (NACPA). In her consulting work, Mary has also conducted human resource audits to help religious organizations assess effective administrative practices and organizational operations. She has worked on-site as a temporary human resource director for parishes, Catholic Charities agencies, dioceses and religious congregations and has conducted several executive searches and retirement studies for both men’s and women’s religious congregations. Mary holds an education degree from Madonna University in Livonia, Michigan and a Certificate in Business Management from St. John Fisher College in Rochester, New York. Her office is located outside of Los Angeles.

**Sr. Margaret Mary Kimmins, OSF** is a member of the Franciscan Sisters of Allegany, NY, and is currently serving her final year as Congregational Minister. Past Positions include: Chair of the Sponsors Council of Catholic Health East, Past President of the Franciscan Action Network, Diocesan Director of Social Justice of the Diocese of Scranton. Worked with adjudicated youth in Passaic, NJ, Diocesan Director of Religious Education in St. Petersburg, FL, Administrator and Team member of the Franciscan Center in Tampa.

**Fr. John Koelle, OFM Cap,** The Province of St. Mary of the Capuchin Order. Fr John Koelle serves on the Investment Council for his province and represents his institution to Investor Advocates for Social Justice.

**Colette L. Kopon,** Ms. Kopon is a partner at Kopon Airdo, LLC. She 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 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. Ms. Kopon
previously served as a judicial law clerk to the Honorable Virginia M. Kendall in the U.S. District Court for the Northern District of Illinois. She received her B.S. in Engineering from Cornell University and her J.D., cum laude, from Chicago-Kent College of Law.

**Andrew Kopon Jr.** Mr. Kopon is a founding partner of Kopon Airdo, LLC. His practice focuses on the handling of complex civil litigation matters, including employment, catastrophic injury, and wrongful death matters. He has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. Mr. Kopon 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 employment law and insurance coverage matters. He is a frequent lecturer on topics related to his legal practice, including the unique issues that face religious institutes. Mr. Kopon is the former President of the International Association of Defense Counsel and has served on the Board of Directors for both religious and non-religious entities. He received both his undergraduate degree from Providence College and his J.D. from The John Marshall Law School, with distinction.

**Ellen Labita, CPA** has over 30 years of experience and is team leader for Baker Tilly’s New York not-for-profit and healthcare practices. She works with religious organizations and their sponsored ministries, educational institutions, human services and behavioral health providers, and other not-for-profits, providing audit and consulting services. Ellen is a professional practice leader for the firm’s not-for-profit industries and a frequent speaker at industry conferences.

**Dayna Larson-Hurst, RN, MSOD** has worked in Catholic health care for the past 20+ years. As a leader and consultant, she has a passion for devising innovative ways to help congregations develop and implement strategic-change initiatives. Much of her work now is focused on both well-being as we age and working with congregations to implement person-directed support 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 has a Master’s Degree in Organization Development.

**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.

**James Malone, CFA, Chief Financial and Diversity Officer, Community Capital Management.** Mr. Malone is responsible for overseeing the firm’s finance operations and financial reporting and establishing policies and opportunities to foster an inclusive, equitable, and supportive work environment. He serves on C.C.M.’s Board of Directors and is a member of the Management Committee, Compliance Committee, Valuation Committee, and Diversity, Equity, and Inclusion Committee. Mr. Malone joined C.C.M. from Franklin Templeton, where he was a vice president for the investment platform division responsible for business development with research platforms across multiple distribution channels. He began his career as a Certified Public Accountant at PricewaterhouseCoopers. He is on the Board of Directors and Finance Committee (Chair) of Sawgrass Adventist School, a private elementary school in South Florida. James
received his B.S. in Finance and Accounting from Northeastern University. He is a CFA Charter holder and a member of the CFA Institute and the CFA Society of South Florida. He holds FINRA licenses: Series 7 & 63.

**Melody Maravillas** is the CFO of the Sisters of St. Joseph of Peace. The Congregation has three regional offices: two in the United States and one in the United Kingdom. As CFO, Melody oversees the accounting and finance functions, including management of its investments. Prior to the working with the Sisters of St. Joseph of Peace, she was the CFO of the Jewish Federation of Northern New Jersey.

**Timothy J. Marchesi, CFA,** is the Chairman, President, and Chief Executive Officer of DeMarche. He also serves as the Chief Investment Officer and Portfolio Manager for DeMarche’s discretionary OCIO affiliate, DMS. Before advancing to the position of CEO, Mr. Marchesi was a Senior Consultant and a leader of proprietary market research. Mr. Marchesi previously served as vice president for American National Bank and Trust Company of Chicago, where he provided portfolio and relationship management for the private client group. Mr. Marchesi serves on the Kansas City Repertory Theatre Board of Directors and is a member of the board’s endowment and finance committees. Mr. Marchesi earned his bachelor’s degree in business administration from the University of Notre Dame. He is a CFA charter holder, having earned the Chartered Financial Analyst designation in 1997. He is a member of the CFA Institute, the CFA Society Kansas City, and the CFA Society Chicago.

**Cynthia Maves** is Director of the Electric Vehicle Program for Nissan North America. Cynthia holds a B.A. from DePauw University and a J.D. from Indiana University at Bloomington. She works with executives, fleet managers and sustainability managers in government, utility and corporate sectors to increase adoption of EV technology. Prior to joining Nissan, she worked for Clean Fuels Ohio, a U.S. Department of Energy Clean Cities Coalition. While at Clean Fuels Ohio, she managed Drive Electric Ohio and spearheaded the publication of Ohio’s Electric Vehicle Readiness Plan. She also has a green building background and worked on building the first LEED certified bank branch in Indiana. Cynthia serves on the boards of Clean Fuels Ohio, Chicago Area Clean Cities and First Federal Savings Bank.

**Susan McDonough, FACHE, NHA** joined the senior living team at Ziegler in 2016. As a special consultant for Catholic Elder Care and post-acute issues, she provides strategy advice to Ziegler’s clients, while also working to promote a sustainable future for Catholic elder care services. From 1996 until 2016, Susan was the vice president, Strategy & System Development for Covenant Health in Massachusetts. In this position, she was responsible for creating system-wide strategy and new business development. Susan provided strategic planning, oversaw advocacy and communication efforts, analyzed new business and acquisition opportunities, supported operational improvement initiatives, and directed start-up management and operational support services to both acute and elder care programs. She directed Covenant’s consulting services to congregations, dioceses, and other not-for-profit organizations. Over the course of her career, she was a principal with the firm Lanzikos, McDonough & Associates, a Boston-based management consulting firm specializing in elder care. She has also served as the State Long Term Care Ombudsman for the Commonwealth of Massachusetts. Susan serves as a board member or sponsor for a wide range of organizations including Presence Health, in Chicago, IL, now part of Ascension/Amita Health, LeadingAge, Washington DC, the Catholic Health Association of the United States, the Massachusetts Alzheimer’s Association, LeadingAge
Massachusetts and several skilled nursing, assisted living and elder care campuses. She is a frequent speaker on health and elder care issues. Susan is licensed as both a Nursing Home Administrator and Social Worker and is a Fellow of the American College of Healthcare Executives.

**Chad McEachern** Exciting. Experienced. Engaged. Just a few of the words used by many to describe the ministry of Chad McEachern, President & C.E.O. of the Edmundite Missions. At the Edmundite Missions, Chad provides oversight, vision, and management to all aspects of the organization. He ensures that needed funds are raised and transformative programs are offered to serve those in poverty in the Deep South. Chad works constantly to use his “vocation as an invitation”, inviting others to join the Edmundite Missions in caring for those most in need. Throughout Chad’s career, he has consistently been nationally recognized as a leader of organizations both within and outside of the Catholic community, including: The Diocese of Madison, The Diocese of Providence, Archdiocese of Boston/National Catholic Bioethics Center (NCBC), United Service Organization (USO), and many others. As an innovative leader in the community of Catholic Philanthropy, Chad is a highly sought-after author and speaker on the topics of fundraising as a ministry, poverty, and Catholic social service within African-American communities. His leadership, counsel, and service are requested by various boards, both in communities served by the Edmundite Missions and nationally, including: the Wallace Community College Foundation Board (Chairman), his local chapter of the Association of Fundraising Professionals, the City of Selma’s Personnel Board, the USCCB’s Sub-Committee Task Force for Cultural Affairs Pertaining to African-American Catholics, the National Catholic Community Foundation (chairman-Networking Council), and more. Chad has also received many awards for his life-changing work from local, regional, and national organizations. Most recently, he was given a “Community Hero” award from the Office of Congresswoman Terri Sewell for his work during the pandemic. He holds in a special place the “Citizen of the Year Award” given to him by the students at Clark Elementary School, a Selma school served by the Missions. Chad’s service has strong roots in world-class Catholic education. He received a Bachelor of Arts Degree in Political Science from St. Michael's College, studied theology at Saint Bonaventure University and Washington Theological Union, and earned a certificate in Catholic Non-Profit Management and Leadership from Notre Dame University.

**Leslie B. Mollsen** is the owner and CEO of American City Bureau, Inc., the nation’s original fundraising consulting firm to nonprofit organizations. The 106-year-old family business is dedicated to building a culture of philanthropy for every client it serves. Specializing in major gift development and capital campaign direction, the national firm is headquartered outside Chicago, Illinois. Ms. Mollsen currently serves on the Board of the National Catholic Community Foundation (NCCF) located in Crownsville, Maryland. She is also a volunteer leader of The Nonprofit Alliance’s Catholic Development Conference, the voice of nonprofits to promote, protect and strengthen the philanthropic sector. She is a past Board Member of the Edmundite Missions, Selma, Alabama, an organization dedicated to feeding, clothing and providing shelter to the poor and marginalized, and fighting systemic poverty in the Deep South. She ranked as the No. 3 most effective fundraising consultant in the nation in an independent survey by Michael Chatman, the Ambassador of Giving and creator of #WhyIGive, one of Twitter’s most popular social media chats in philanthropy. Ms. Mollsen served on the Board of Directors of the National Catholic Development Conference (NCDC). Prior to this, she was honored with NCDC’s
prestigious George T. Holloway Distinguished Service Award. She served on the Giving USA Foundation Board (formerly the American Association of Fundraising Counsel’s Trust for Philanthropy) for nine years. Ms. Mollsen is a published author and speaks at many conferences and seminars nation-wide (and internationally) on the topic of major gift development, volunteerism, leadership, capital campaigns and campaign preparedness. Throughout her career, she has served more than a hundred not-for-profit clients including: Religious communities of women and men, educational and arts institutions, social service and healthcare organizations, and more. Ms. Mollsen is a graduate of Marquette University. She and her husband, Daniel, have two boys, 18 and 23 years old.

Sr. Frances Nadolny, OP, is a member of the Adrian Dominican Sisters in Michigan. She has served on General Council since 2016 and will continue through June of 2022. Her former ministries include time in Congregation leadership as Chapter Prioress and in Educational Administration in Detroit and Chicago. Previously she was the director of the Congregation’s Ministry Trust Office, which oversees the awarding of grants to organizations in which Adrian Dominican Sisters minister or volunteer.

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.

Constance Neeson is the director of Benefit Eligibility Management for Religious for BMT, a Division of Christian Brothers Services. Constance is a Licensed Social Worker in the state of Indiana. Constance and her team of Benefit Eligibility Consultants specialize in implementing efficient benefit eligibility management programs for over 70 religious institutes. Over the past 14 years, her team has assisted various religious institutes in achieving a total estimated financial impact of over $100 million, in increased income and in health care savings, for their congregations, through use of the various available benefit programs. The team also assists congregations with accessing enrollments into various insurance programs, and with medical billing processing. Constance has been a featured speaker at previous conferences of the Resource Center for Religious Institute (RCRI), National Association of Treasurers of Religious Institutes (NATRI), and Orientation to Management of Religious Institutes (OMRI), and at regional Congress of Religious Treasurers (CORT) meetings.

Sue Novak, Partner – Plante Moran. Sue has more than 30 years of experience in the not-for-profit industry. She has provided accounting, auditing, tax and management consulting services to a variety of not-for-profit organizations and religious congregations. She has worked with more than 75 religious congregations throughout the United States and internationally on financial statement audits, analyses of congregation resources, planning and operations. She has presented on technical accounting issues at RCRI, NATRI, LCWR, national, state, and firm not-for profit education seminars.

Kevin O’Connell, CPA specializes in assurance and compliance services, providing our clients with in-depth knowledge of technical U.S. GAAP accounting and compliance under the Uniform Guidance. He works with a broad range of industries, particularly not-for-profit, consumer goods, and technology. In addition, Kevin has experience assisting our clients in the
professional services, life science, gaming, private schools, and real estate industries.

**Kathryn Oosterhuis, MLIS, CA**, serves as the Director of Mercy Archives for the Sisters of Mercy of the Americas. Mercy Heritage Center, the central repository, is located in Belmont, NC, and holds the collective memory of twenty-five former local communities, two of the six regional communities, the Institute, and historic Mercy ministries. Kat has been with the Sisters of Mercy since 2016.

**Krista Pankop, CPA** has been with the Baker Tilly since 1995. She serves as the firm leader of the behavioral health sector and chairs the firm’s women’s affinity committee, Growth and Retention of Women (GROW). Krista specializes in serving not-for-profit clients including religious orders and their ministries, healthcare, senior living and behavioral health. Outside of the office, Krista serves as the treasurer of a sponsored ministry.

**Bryan Pini, CFA** is the President and Chief Investment Officer of Mercy Investment Services. Prior to joining the organization in 2007, Bryan was 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 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 in St. Louis. He is a Chartered Financial Analyst and a member of numerous professional and community organizations.

**Sr. Helen Prejean, CSJ** is known around the world for her tireless work against the death penalty. She has been instrumental in sparking national dialogue on capital punishment and in shaping the Catholic Church’s vigorous opposition to all executions. Born on April 21, 1939, in Baton Rouge, Louisiana, she joined the Sisters of St. Joseph in 1957. After studies in the USA and Canada, she spent the following years teaching high school, and serving as the Religious Education Director at St. Frances Cabrini Parish in New Orleans and the Formation Director for her religious community. In 1982, she moved into the St. Thomas Housing Project in New Orleans to live and work with the poor. While there, Sister Helen began corresponding with Patrick Sonnier, who had been sentenced to death for the murder of two teenagers. Two years later, when Patrick Sonnier was put to death in the electric chair, Sister Helen was there to witness his execution. In the following months, she became spiritual advisor to another death row inmate, Robert Lee Willie, who was to meet the same fate as Sonnier. After witnessing these executions, Sister Helen realized that this lethal ritual would remain unchallenged unless its secrecy was stripped away, and so she wrote a book, *Dead Man Walking: An Eyewitness Account of the Death Penalty in the United States*. The book was published when national support for the death penalty was over 80% and, in her native Louisiana, closer to 90%. The book ignited a national debate on capital punishment, and it inspired an Academy Award winning movie, a play, and an opera. Sister Helen has made personal approaches to two popes, John Paul II and Pope Francis, urging them to establish the Catholic Church’s position as unequivocally opposed to capital punishment under any circumstances. Under John Paul II the catechism was revised to strengthen the church’s opposition to executions, although it allowed for a very few exceptions. Not long after meeting with Sister Helen in August of 2018, Pope Francis announced new language of the *Catechism of the Catholic Church* which declares that the death penalty is inadmissible because it is an attack on the inviolability and dignity of the person, with no exceptions. Today, although capital punishment is still on the books in 30 states in the USA, it has fallen into disuse in most of those states. Sister Helen

**Jon Quigley, CFA** is the Chief Investment Officer of Disciplined Equity for Great Lakes Advisors. He leads the management of all Disciplined Equity strategies, provides oversight of the Disciplined Equity Team, leads efforts in enhancing existing portfolio management systems and is the Chairman of firm’s Investment Committee, as well as a member of the Management Committee. Jon received his undergraduate degree from Wake Forest University and his MS in Predictive Analytics from Northwestern University. Jon is a CFA charter holder. Prior to joining the firm in 2000, Jon was a Portfolio Manager with LBS Capital Management where he was responsible for the global tactical asset allocation and tactical sector selection strategies. He is a member of the Society of Quantitative Analysts, the CFA Institute, the CFA Tampa Bay Society and the Chicago Quantitative Alliance. Jon is a graduate of Leadership St. Petersburg and has served as Treasurer for the Board of Creative Clay as well as having served on the Boards of the Salvador Dali Museum's Zodiac Group, and the Museum of Fine Arts’ Contemporaries Group.

**Kelly Ray** Partner – Plante Moran. Kellie is a partner with more than 20 years of experience, who has served over 100 not-for-profit and religious organizations in accounting, auditing, tax and management consulting. She is a member of the firm’s not-for-profit leadership team and serves as the regional practice leader for Southeastern Michigan. She has consulted with various not-for-profit organizations with respect to implementation of new auditing and accounting standards. Kellie serves as a firm-wide technical resource to engagement teams to resolve auditing and accounting issues within the not-for-profit industry group. Kellie coordinates, and is a presenter at, internal and external not-for-profit technical trainings.

**Sr. Nancy Reynolds, SP, MA, JCL** is a member of the Sisters of Providence of Saint Mary-of-the-Woods, Indiana. She has a Licentiate in Canon Law from the Catholic University of America in 1984 and a Master’s in Mathematics from the University of Nebraska in 1972. She has served as a member of her General Council from 2001 to 2011 and as General Treasurer of her congregation from 2001 to 2013. She served as Director of the Tribunal in Evansville, Indiana from 1978-1984 and Director of the Tribunal in San Francisco from 1986-2001. During her time in Tribunals she also taught Canon Law in several seminaries and universities as either an Adjunct Professor or Instructor in summer programs. She has been a member of the Board of Governors of the Canon Law Society of America as a Consultant from 1995-97 and as the Treasurer of that Society (2016-2019). She served two terms as a member of Board of the Leadership Conference of Women Religious and as a member of the Executive Committee for two of those years. She has worked as a canonical consultant to numerous leadership teams and served as an Advocate for individual religious or leadership teams since 1984. She continues the ministry of canonical consultant at the present time. In 2016 Nancy was appointed by CICLSAL to serve *ad nutum Sanctae Sedis* as the Prioress of the Carmelite Nuns in Louisville, Kentucky.

**Nichole Roman-Bhatty**, Managing Partner, Marquette Associates, is a managing partner for Marquette Associates. An owner of the firm, Nichole has been with the company since 1998 and has 26 years of investment experience. She serves as the primary investment consultant on several of the firm's relationships. Her primary client focus is on nonprofits, religious, public, and corporate plans. Nichole is the director of
religious services at the firm, chair of the sustainable investing group, and a member of the firm’s endowment & foundation services committee. Prior to joining Marquette, Nichole served as a credit manager at Norwest Financial. She holds a B.S. in finance from Michigan State University and an M.B.A. with honors from the University of Notre Dame.

Nichole is a member of the Investments and Wealth Institute (formerly known as the Investment Management Consultants Association) and holds the Certified Investment Management Analyst® (CIMA®) certification. She is a board member of the Defined Contribution Institutional Investment Association (DCIIA) and a member of the National Association of Securities Professionals (NASP). Nichole serves as the vice president of Leaders Investing for Tomorrow (LIFT), a civic-minded nonprofit group focused on women and diversity; is vice president of the Julia Center, an immigrant outreach center founded by Victory Noll Sisters; and was formerly the president for Women Investment Professionals, Chicago. She is also a member of the Chicago Finance Exchange.

**David Rosen** Founder- First Person Politics.
Born and raised in Dallas, Texas, David Rosen has more than a decade of experience in politics and public affairs. He has served as a campaign strategist for numerous state legislative races and managed the individual giving program at the Government Accountability Project, the nation’s leading whistleblower protection organization. He also has vetted candidates for DC’s top political staffing firm and worked as a messaging strategist for Media Matters. He currently handles communications related to regulatory affairs for Public Citizen, the Clean Budget Coalition and the Coalition for Sensible Safeguards. Mr. Rosen is the founder of First Person Politics and the editor of its blog. He holds a bachelor’s degree in Philosophy from Tufts University as well as a master’s degrees in Political Psychology and Political Management from George Washington University. He lives in Washington, DC.

**Sr. Corinne Sanders, OP** is a member of the Adrian Dominican Sisters in Michigan and is currently Director of the Office of Sustainability. Her former ministries include time on Congregation leadership as a member of General Council from 2010-2016 and Administrator and Institutional Director at congregation institutions Rosarian Academy and Barry University, both located in Florida.

**Lisa M. Schell, MA, MLIS**, Adrian Dominican Sisters Archives, Adrian, MI, is the Congregation Archivist for the Adrian Dominican Sisters Archive in Adrian, Michigan. She is committed to preserving Sister stories, mentoring volunteers and interns, sharing the value of archival strategies and professionalizing Women of Religious Archives.

**Timothy Schroeder** is the business manager of St. Lawrence Seminary, a ministry of the Province of St. Joseph of the Capuchin Order and has ministered in this capacity for 15 years. He is an alumnus of St. Lawrence Seminary. Prior to joining the seminary staff, Timothy was a business analyst in the back-office operations of the brokerage industry and responsible for implementing systems for the U.S. Patriot Act. He holds an MBA from Marquette University. Timothy volunteers in a number of activities, mainly focusing on the promotion and support of Catholic education, where he has held treasurer roles for scholarship organizations to chaired school boards.

**Sr. Susan Schorsten, HM** is a member of the Sisters of the Humility of Mary of Villa Maria, PA. She has served in various ministries including nursing, health care administration, diocesan social ministry, Community Leadership, retreat ministry and facilitation and consultation. Sr. Susan has served as a NRRO consultant for both eldercare and planning and implementation. She is currently working with several congregations and their planning for the
future. She is also involved with retreat ministry in both South Carolina and North Carolina. She has been a presenter for various communities on aging, eldercare and the spirituality of aging.

Erin Shvetzoff Hennessey has expertise in the senior health care industry, advising providers in the areas of post-acute care management, operational and financial performance improvement, and organizational and ownership structure, as well as hands-on experience as an administrator of skilled nursing and senior living facilities in several states. She is active in senior services professional and trade organizations to provide them with education resources, industry information, and support for members, and speaks at state and national meetings, as well as religious institutes on senior health care, health care reform, and planning for aging populations. Ms. Hennessey is a certified gerontologist and served as a guest faculty member on post-acute care for Estes Park Institute, a provider of professional education for hospital executives, board members, and physician leaders. She was named a 2019 Senior Living Leader Under 40 by Argentum, a national senior living association, and serves on the LeadingAge Minnesota Board of Directors. Ms. Hennessey has advised more than 20 religious institutes throughout the country.

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. Speasmaker 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.

Jonathan B. Spencer, CFA. Originally from South Africa, Jonathan is a CFA charter holder and has an M.A. in International Relations from Regent University and B.Com in Investment Management from the University of Pretoria. His experience includes both senior portfolio management roles and hands-on transaction experience. Jonathan is a managing principal of Twende Investment Group and serves on the board HART US- a humanitarian aid organization.

Julie Tanner joined CBIS in September 2002. She leads the development and implementation of CBIS’ Catholic Responsible InvestmentsSM Program and oversees the Catholic investment screening, engagement, and proxy voting activities, to integrate Catholic Responsible InvestmentsSM 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.

Kristina Van Liew Managing Director – Wealth Management. Nationally recognized for her leadership and innovation in impact and mission-aligned investing, Kristina Van Liew co-leads the Chicago office of Graystone Consulting, the independent Institutional Consulting Division of Morgan Stanley. Kristina is an industry veteran with more than 30 years’ experience who draws upon a long legacy of serving the investment consulting needs of the nonprofit sector and complex private wealth arena. Under Kristina’s helm, the Chicago Practice has grown to become one of the industry’s largest and most well-known in the consulting field. Aside from her leadership roles within Morgan Stanley, Kristina has a rooted commitment in her community. She serves on Board of Trustees of All Saints Catholic
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Academy and is a Life Director and past Chair of the Board of Executive Service Corps of Chicago, one of the country’s largest and oldest nonprofit management consulting firms. Past Board experiences include the Aurora Civic Center Authority (Paramount Theatre) and the founding Board member of iMentor Chicago, an innovative and fast-growing college success program for Chicago inner city youth. She is also a member of Forefront and ICCR (Interfaith Center on Corporate Responsibility). Over the years, Kristina and her partners have received numerous distinctions and professional accolades, including the #2 spot on the Barron’s 2019 Top Institutional Consultants List. She is included on Barron’s 2019 Top 100 Women lists, the 2020 Forbes Best-In-State Wealth Advisors ranking, and one of the first professionals to be included in the 2014 Financial Times Inaugural Top 100 List. Kristina was named by Morgan Stanley to the 2017 MAKERS List, a women’s leadership platform highlighting stories of groundbreaking women. For the past several years, Kristina was also selected as one of the “Top Wealth Adviser Moms,” by Working Mother magazine and SHOOK Research. Kristina holds the Certified Investment Management Analyst (CIMA) designation, awarded by the Investments and Wealth Institute (formerly Investment Management Consultants Association - IMCA). She earned a bachelor’s degree in Business Administration with a minor in French at the University of Iowa and an M. B.A. with a concentration in Marketing and Finance from the J.L. Kellogg Graduate School of Management at Northwestern University.

Peg VanWagoner is a Senior Consultant for DeMarche and specializes in advising foundations and endowments. She is a frequent speaker at DeMarche investment workshops, discussing current trends in defined contribution plans, asset allocation and fiduciary responsibilities. Ms. VanWagoner previously served as Vice President and Senior Relationship Manager at American Century Investments, where she worked with the firm’s largest institutional clients and consultants. Prior to that, she was the Director of Client Service and Consultant Relations for Thomson Horstmann & Bryant. She began her investment career at DeMarche in a management position and advanced to become a Senior Consultant. She is an advisory board member of the Kansas City Women’s Foundation where she has also served as president and board member. She also serves as an advisory board member for the School of Social Welfare at the University of Kansas. She is a former board member, investment committee member and board chair emeritus at the Health Forward Foundation and former member of the investment committee of the Catholic Diocese of Kansas City-St. Joseph. Ms. VanWagoner earned her MBA from Rockhurst University and her BSBA from the School of Business at the University of Kansas and is a member of the CFA Institute and the CFA Society Kansas City.

Stephen M. Waldorf is a principal partner and managing director of Waldorf Risk Solutions. Graduating from Catholic University of America in Washington, DC. with a Bachelor of Arts degree, Stephen joined the family brokerage firm and has been there for almost 30 years. He further developed his knowledge and bridged his skills by working at London at Lloyds and with international markets. Stephen maintains insurance licenses in over 28 states. He excels in designing, structuring, and implementing alternative risk transfer vehicles on behalf of Catholic Dioceses, religious orders and not-for-profit entities throughout North America. His expertise has been called upon to lecture on risk management publicly and privately, analyze policy forms and consult on program structures and coverages for numerous clients. He has completed the two-year Pastoral Formation program through the Diocese of Rockville Centre and received the Caritas Medal from Molloy College. Stephen has a passion for
Steve Wilder Partner, Sorensen Wilder & Associates, Specialist in Safety & Security Solutions. Steve Wilder has spent the past 35 years in safety, security, and risk management. He has provided consultation services to hundreds of clients, including government, education, manufacturing, retailing, healthcare, and industry. Mr. Wilder has developed management programs in Safety, Life Safety, Security and Emergency Preparedness. He has performed security threat and vulnerability assessments at over 400 locations across the United States and has trained thousands of workers in workplace safety, active shooter preparedness and response, and facility security. Steve has consulted for law firms and insurance companies on issues of safety, security, risk management, aggression management, and workplace violence. He has authored two books and writes columns for several magazines and trade journals. In 2016, Steve was the lone professional security consultant appointed by Governor Rauner to the Illinois School Security Standards Task Force, a statewide group charged with developing new security standards for elementary and high schools in Illinois.

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, three being international congregations. Five of these congregations have been in the process of moving toward fulfillment of their mission. Marlene’s academic degrees include a Ph.D. in Higher Education Administration and a J.C.L. in Canon Law.

Karen Watson, CFA, AIF®, CIO has been the Chief Investment Officer for the Congregation of St. Joseph since June 30, 2016. As Chief Investment Officer, Ms. Watson is responsible for the overall investment strategy for the Congregation including portfolio structure and evaluation, manager evaluation and selection, and socially responsible investment oversight. Ms. Watson also serves as chairperson of the Congregation’s Investment Committee and SRI Sub-Committee. Prior to joining the Congregation of St. Joseph, Ms. Watson spent 13 years at Arthur J. Gallagher and provided investment consulting services to the firm’s religious clients. Ms. Watson is a member of the CFA Institute and the CFA Society of Pittsburgh. Ms. Watson received her BS in Finance from The Pennsylvania State University and her MBA in Corporate Finance from the University of Dallas.

Sr. Michelle Wronkowski, SSJ-TOSF, Second Vice President - Sisters of St. Joseph of the Third Order of St. Francis. Sister Michelle Wronkowski has served as a vice president for the Sisters of St. Joseph of the Third Order of St. Francis since 2008. Prior to that, she served as an educator and administrator for Catholic schools at the elementary, middle, and high school levels. She earned her MBA from Marian College, her master’s degree in elementary education and teaching from Viterbo University, and her bachelor’s degree in elementary and middle school education from St. Norbert College.

Sr. Sharon Zayac, O.P. is a Dominican Sister of Springfield, Illinois. Sharon has a bachelor’s degree in secondary education and a master’s in hospital administration. She spent ten years
as a high school education, and thirteen years in hospital administration, the last six as President & CEO of St. Mary’s Hospital in Northwest Arkansas. After resigning her position, she entered a sabbatical program at Siena Spirituality Center in Water Mill, NY. It was there that Sharon’s “own deep longing and the Universe’s deep need finally connected.” In 2001 she received a Master’s in Earth Literacy from Saint Mary-of-the-Woods College, IN, becoming that program’s first graduate. Sharon is co-founder of Jubilee Farm, her congregation’s 164-acre center for ecology and spirituality, which lies just west of Springfield, IL. Her book *Earth Spirituality: In the Catholic and Dominican Traditions*, published in 2003 by Sor Juana Press, was the first in the series Dominican Women on Earth. In October of 2008 she joined 139 others for training by Al Gore to present his award winning *An Inconvenient Truth* from a faith-based perspective. Since then she has given dozens of programs on climate change to a wide variety of audiences. In October of 2015 she was one of the panelists to speak to the encyclical *Laudato Si’* at a program with Cardinal Peter Turkson, hosted by the Catholic Conference of Ohio Bishops and the Catholic Climate Covenant held in Columbus, OH. She is included in the book *Green Sisters: A Spiritual Ecology* by Sarah McFarland Taylor.

Sharon writes, speaks, and leads retreats both within the U.S. and around the world. Her passion is sharing the Cosmic Creation Story and its implications for life and faith.