A Synodal Church: Together in Service to the Church’s Mission

Annual RCRI Conference
Dallas, Texas October 4th-7th, 2022
Welcome to the 2022 Annual RCRI Conference!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, I welcome you to the 2022 annual conference in Dallas, Texas. The last time we gathered in person for the annual conference was in 2019 in the same site we will gather in 2022. Since that time the experience of a global pandemic has challenged us in ways never imagined. Yet, realizing in new ways how our lives are interwoven with so many other people helping to shape our decisions and our lives, we continue to walk together in hope.

We are pleased to announce that the registration fee for the 2022 conference has been reduced to enable more people to participate. We are also video recording all workshops during the conference. The recordings will be made available to members following the conference. Prior to our gathering in Dallas, we will let you know of any protocols that may be in existence to protect ourselves and others to ensure that all attendees have an enriching, enthusiastic, and enjoyable conference.

The 2022 Conference Planning Committee has developed an extensive program of workshops addressing topics many of you have suggested as well as new topics that we hope will support you in addressing the financial and legal issues facing your institutes, especially during these times of transition.

This year’s conference theme is A Synodal Church: Together in Service to the Church’s Mission from Pope Francis’ Preparatory Document, For a Synodal Church: Communion, Participation, and Communion. Pope Francis describes synodality as being “at the service of the Church’s mission, in which all her members are called to participate” [35]. Synodality is “a path by which the Church can more fruitfully fulfill her mission... as a leaven at the service of the coming of God’s Kingdom” [Vademecum 1.4].

Among the highlights of the 2022 conference will be the keynote address by Cardinal Wilton Gregory, Archbishop of Washington, on Tuesday evening, October 4th. Prior to the opening of the conference, we will offer two pre-conference workshops: half-day sessions on TRENDS for Beginners and a legal pre-conference titled Religious Institutes in a “Fingers Crossed” Post-Covid World.

We have scheduled 40 workshops, including two workshops on Eldercare sponsored by NRRO. On Thursday afternoon, October 6, a conference liturgy will be celebrated for all participants.

We welcome you to the RCRI Dallas, Texas conference and look forward to sharing this time with you.

Sincerely,

Sr. Sharon Euart, RSM
Executive Director
**TUESDAY, OCTOBER 4th**

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<td>8:00 AM</td>
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<td>9:00 AM – 12:00 PM</td>
<td>PRE-CONFERENCE WORKSHOPS</td>
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<td><strong>TRENDS for Beginners</strong></td>
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<td>– Matt Wade &amp; Br. Lawrence Lundin, SJ</td>
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*Your registration fee includes lunch for all pre-conference attendees.
WEDNESDAY, OCTOBER 5th

7:00 AM  MASS
7:30 AM  BREAKFAST/EXHIBIT HALL
8:30 AM  PRAYER

9:00 AM – 10:30 AM  SESSION 1
1. Navigating Information Gathering, Sharing, and Consensus Building; Tips on Implementation Strategies to Move Your Congregation Forward vs. Standing Still
   – Sr. Nancy Conway, CSJ & Julie Heiberger

2. Fiduciary Duties of Members of Religious Institutes
   – Michael Airdo

3. Climate Change; Risks and Opportunities in Investments
   – Jon Quigley & Laura Wicklander West

4. Unlocking the Fundraisers Within; 10 Simple Steps
   – Mary Foley

5. Learning about Me by Being with Thee: What Persons with Dementia Can Teach Us
   – Dayna Larson-Hurst

10:30 AM  BREAK

11:00 AM – 12:30 PM  SESSION 2
6. Lessons From a Pandemic: A Look at Governance and Administration
   – Jennifer Gniady

7. Supporting your Ministries Today and Tomorrow by Redefining how you use your Buildings and Land
   – Shane Larsen & Sr. Susan Rudolph, OSB
8. Governance: Operational Risks Mitigation for Institutional Investment Programs
   – John Bolton, Melody Maravillas & Scott Santin

9. 2022 Top Trends in Aging Services
   – Darrin Hull & Erin Shvetzoff Hennessey

10. Review Of Federal Reporting Requirements for the Religious Institute and Sponsored Ministry
    – Christopher Fusco & Br. Lawrence Lundin, SJ

12:30 PM – 2:00 PM  LUNCH BUFFET

2:00 PM – 3:30 PM  SESSION 3

    – Tom Drez

12. A Reconfiguration Hit Parade: The Twenty Most Important Things Learned So Far in the 21st Century about the Civil Reorganization of Religious Institutes
    – Kenneth Alderfer, Miriam Foley & Mark MacDougall

13. Advanced Topics in Accounting
    – Josh Jarvie, Kellie Ray & Jeff Zeleji

14. From Liabilities to Assets: Reimagining Religious Property
    – Madeline Johnson & David Murphy

15. How Diverse is Your Investment Portfolio?
    – Suzanne M. Bernard, CFA, CAIA

3:30 PM  BREAK
SESSION 4

16. Navigating Immigration Challenges for International Religious Workers in the United States
   – Graciela Mateo & Miguel Naranjo

17. Keys to Envisioning, Creating and Sustaining a Successful Investment Strategy
   – Eileen Alexanderson, Zela Astarjian, Mary Burke & Sr. Suzanne Brennan, CSC

   – Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP

   – Sr. Sue Ernster, FSPA & Julie Heiberger

20. Employees in Ministry: Making Sense of Administrative Rules and Judicial Cases in Practice
   – Jennifer Gniady

THURSDAY, OCTOBER 6th

  7:30 AM      BREAKFAST IN THE EXHIBIT HALL
  8:30 AM      PRAYER

  9:00 AM – 10:30 AM  SESSION 5

21. Civil and Canonical Perspectives on an Ever-Changing Legal Landscape for Sexual Abuse Claims
   – Michael Airdo, Sr. Sharon Euart, RSM & Christopher Fusco
22. Private Impact: Aligning Capital with Environmental and Social Objectives
   – Michael Boensch, Ellen Hazen & Sr. Carol Lichtenberg, SNDdeN

   – Anne Kertz Kernion

   – Stephen Waldorf

25. Advanced Topics in Accounting
   – Josh Jarvie, Kellie Ray & Jeff Zeleji
   (Repeat of workshop 13)

10:30 AM
BRAKE

11:00 AM – 12:30 PM
SESSION 6

26. Discerning Hearts Need Accurate TRENDS
   – Bethany Jaeger, Sr. Hertha Longo, CSA & Kate Ward

27. Sponsorship in Jeopardy
   – Mark Chopko & Michael O’Mara

28. Fraud Prevention and Detection: Leading Practices to Protect your Not-for-Profit
   – Laurie Horvath, Ellen Labita, Kevin O’Connell, Krista Pankop & Timothy Schroeder

29. Applying Catholic Social Teaching to Advance Racial Equity in the Portfolio
   – Lisa Hinds & Courtney Wicks

30. Keep It Simple, (Insert Position Here): A Leader’s Guide To A Successful Development Program
   – Leslie B. Mollsen & Chad McEachern
12:30 PM – 2:00 PM  LUNCH ON YOUR OWN

2:00 PM – 3:30 PM  SESSION 7
31. Copyright Claims Against Religious Institutes
   – Michael Airdo & Mollie Werwas
32. Managing Transitions for Religious Institutes
   – Mary Kessler
33. Incorporating the Values of the Sustainable Development Goals into Your Portfolio
   – Ruadhri Duncan, Nicole Johnson-Barnes, Therese Kieve & Nicole Roman-Bhatty
34. Using Property to Respond to the Call
   – Erin George, Sr. Maribeth Larkin, SSS, Sr. Mary Pellegrino, CSJ & Samantha Wild
35. Tax and Group Ruling Updates for Religious Institutes
   – Madeline Obler

3:30 PM  BREAK

3:45 PM – 5:15 PM  SESSION 8
36. What Do the Revised USCCB SRI Guidelines Mean to Your Institution?
   – Raymond Burnell, Christopher Cox, Sr. Sue Ernster, FSPA, Kathryn McCloskey & Fr. Séamus Finn, OMI
37. The Dance of Change: Two Steps Forward and One Step Back
   – Sr. Eileen McCann, CSJ & Sr. Ruth Plante, OSBM
38. With These Uncertain Times Will Employees Be Able to Retire Someday?
   – Jim Ceplecha
   – Laura Solomon

5:30 PM
   CONFERENCE LITURGY

FRIDAY, OCTOBER 7th

7:00 AM
   MASS

7:30 AM – 9:00 AM
   HOT BUFFET BREAKFAST

9:00 AM – 10:30 AM
   SESSION 9
   40. Government Programs Update: 2022-2023
      – Constance Neeson
TUESDAY, OCTOBER 4th

**PRE-CONFERENCE WORKSHOPS**

9:00 AM – 12:00 PM

**TRENDS for Beginners**
– Matt Wade & Br. Lawrence Lundin, SJ

This workshop is designed to demonstrate the program for those who are new to TRENDS and want an introduction, or for those who have not used TRENDS in a while and want a refresher. It will include a brief overview of installation of the software and use of the matrix to enter historical year financial and demographic data. The “My Trends” interface will be demonstrated. The enhancements offered in the new version of TRENDS 2021 will be briefly presented as well. There will be discussion of a review of results for reasonableness. Another portion of the presentation will include use of the scenario analysis tool and moving charts and graphs to other programs for reporting. As a pre-requisite, those who attend should have purchased either TRENDS 2015 or TRENDS 2021.

1:30 PM – 4:30 PM

**Religious Institutes in a “Fingers Crossed” Post-Covid World**
– Michael Airdo & Mollie Werwas

The 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.
This presentation will provide attendees with an understanding of a range of topics, keying attendees into areas of law in which they need to know more and helping direct them towards workshops that best suit their needs.

**Welcome and Prayer Keynote Address**
by His Eminence, Cardinal Wilton Gregory

**Together in Synod: Religious, Laity and Clergy**

Pope Francis has called the Church to journey together in preparation for the next General Ordinary Synod in 2023. More importantly though, Pope Francis has called the Church to journey together in a synodal fashion beyond the 2023 Synod in Rome. This talk will examine how the Church will journey together into the future in our evangelization, governance structures, and community life. A particular focus of this talk will be on how this journeying together must include a constant dialogue between religious, laity, and clergy, and how the Church can learn from the rich tradition of synodal structures already present in many religious communities. The practice of communal discernment with and relationship with authority in Institutes of Consecrated Life can provide the Church with a way forward after the completion of the Synod.

**Cardinal Gregory** was born in Chicago and attended St. Carthage Grammar School, where he converted to Catholicism. He attended Quigley South Preparatory Seminary, Niles College (now St. Joseph’s College Seminary) of Loyola University and St. Mary of the Lake Seminary.

He was ordained a priest of the Archdiocese of Chicago on May 9, 1973, and three years after ordination began graduate studies at the Pontifical Liturgical Institute.
(Sant’ Anselmo) in Rome, where he earned a doctorate in Sacred Liturgy in 1980.

He was ordained auxiliary bishop of Chicago on December 13, 1983 by Cardinal Joseph Bernardin. In 1994, he was installed as the bishop of the Diocese of Belleville, IL. He was appointed as the sixth archbishop of the Archdiocese of Atlanta on December 9, 2004. On April 4, 2019, he was appointed by Pope Francis as the seventh Archbishop of the Archdiocese of Washington. On October 25, 2020, Pope Francis named Archbishop Gregory one of thirteen new cardinals. Cardinal Gregory was elevated by Pope Francis to the College of Cardinals in November 2020 Consistory.

Cardinal Gregory currently serves as a Member of the Vatican Dicastery for the Laity, Family and Life and on the Board of Trustees for the Papal Foundation. Additionally, he is the Catholic Co-Chair of the National Council of Synagogues consultation for the United States Conference of Catholic Bishops (USCCB).

Cardinal Gregory has served as the president of the U.S. Conference of Catholic Bishops (USCCB). During his tenure in office, the crisis of sex abuse by Catholic clergy escalated; and under his leadership, the bishops implemented the “Charter for the Protection of Children and Young People.”

In 2006, Cardinal Gregory joined an illustrious group of preachers with his induction into the Martin Luther King, Jr. Board of Preachers at Morehouse College, Atlanta. Cardinal Gregory was honored with the Cardinal Bernardin Award given by the Catholic Common Ground Initiative (2006).
1. **Navigating Information Gathering, Sharing, and Consensus Building - Tips on Implementation Strategies to Move Your Congregation Forward vs. Standing Still**  
   – Sr. Nancy Conway, CSJ & Julie Heiberger  
   Participative decision-making—which most congregations value and attempt to use with multiple groups—can be harried and confusing, especially with a high-stakes issue like the future of land or buildings! What members might assume will happen with their feedback can be quite different from how the group presenting the information will actually use it. Our workshop will explore five different and valid ways to use solicited feedback from members and engage them in participatory decision-making.

2. **Fiduciary Duties of Members of Religious Institutes**  
   – Michael Airdo  
   When religious institutes are organized and registered as civil corporations, they become subject to a body of statutory law and common law principles governing the operation of those legal entities. The members of religious institutes that serve as the members, directors, or officers of civil corporations owe certain fiduciary duties to those legal entities, and they must make decisions that affect the corporation in conformance with those duties. This presentation will provide an overview of the fiduciary duties owed by members of religious institutes to the civil corporations which they serve and coverage considerations relating to same and will provide guidance for members of religious institutes to fulfill their fiduciary duties while also serving the best interests of their ministry.
3. Climate Change: Risks and Opportunities in Investments
   – Jon Quigley & Laura Wicklander West
   The effects of climate change on people and the planet are becoming increasingly evident. Our responsibility is to protect the planet so it can continue to provide for all people, particularly the poor and vulnerable. The impacts of climate change create new uncertainties and risks that affect businesses and investors. We will discuss how climate change also creates opportunities, both in identifying investments in companies that are actively reducing their climate change risk, as well as investments in solutions that are creating positive impacts.

4. Unlocking the Fundraisers Within: 10 Simple Steps
   – Mary Foley
   Everyone in your Congregation loves to ask for money, right? If your answer was not a resounding YES, good news: they’ve just not yet been sufficiently educated, inspired, trained and/or motivated. Fundraising is a learned skill and there are ample methods to get past the “anything but that” reaction from leadership, staff, volunteers, associates, and turn them into true and effective mission ambassadors. Join us to see how you can inculcate fundraising as a ministry that is comfortable and rewarding for even the most unlikely candidates.

5. Learning about Me by Being with Thee: What Persons with Dementia Can Teach Us
   – Dayna Larson-Hurst
   What if... when we were in the presence of a person living with dementia, we saw this person as our teacher? As someone who gives us the opportunity to learn more deeply about ourselves? To learn what challenges us and what gives us joy; how to take care
of our body, our mind and our spirits more effectively. During this workshop we will consider how we might take these situations, that we are often challenged by, to more positively impact our lives and the lives of others whom we are supporting.

**SESSION 2**

6. **Lessons From a Pandemic: A Look at Governance and Administration**
   – Jennifer Gniady
   During the pandemic, many administration and governance issues either came to the forefront or were pushed aside for more urgent crises. This workshop looks at how we can use those experiences to improve organizational administration and governance. Topics will include both the documents governing our entities and the people carrying out governance through boards, councils, and committees. We’ll also look at trends in policies and practices, including whether to revisit pre-pandemic ways of doing things.

7. **Supporting your Ministries Today and Tomorrow by Redefining how you use your Buildings and Land**
   – Shane Larsen & Sr. Susan Rudolph, OSB
   The session will focus on strategies to engage all members of a religious community to better understand current building needs and turn those into opportunities for future ministry growth. Specific examples will be shared of how to communicate technical data and create a comfortable means for all to discern these difficult decisions in a healthy manner. A portion of the session will break down what facility assessments and master plans are, and how they can prepare communities for the difficult decisions ahead. A case study will be shared.
concerning the Sisters of the Order of Saint Benedict and the process they used to evaluate their properties and transparently evaluate strengths and challenges to assist the Sisters in making difficult decisions.

8. Governance: Operational Risks Mitigation for Institutional Investment Programs
   – John Bolton, Melody Maravillas & Scott Santin
   It is critical for Leadership teams to ensure their organizations have well-defined Governance procedures in place to maintain proper oversight of their investment programs. Investment operations are becoming more complex; recognizing increased market volatility, desired ESG (environmental, social and governance) mandates, cybersecurity threats, all coupled with ongoing staffing changes that have elevated risks to untenable levels. This presentation will review Governance best practices an organization should consider, that when implemented, improve investment outcomes and can significantly reduce operational risk.

9. 2022 Top Trends in Aging Services
   – Darrin Hull & Erin Shvetzoff Hennessey
   As a leading senior living management and consulting organization, Health Dimensions Group has a unique perspective on current and emerging trends affecting the aging services profession. With the monumental changes of the past year as context, please join Health Dimensions Group as we present the 2022 Top Trends in Aging Services, with a special focus on the impact of these trends on religious organizations’ senior care operations. Reflecting deeply on these trends will be vital as you develop your organization’s strategic and operational plans for the year ahead.
10. **Review Of Federal Reporting Requirements for The Religious Institute and Sponsored Ministry**  
   – Christopher Fusco & Br. Lawrence Lundin, SJ

Federal law, as well as the law in many states, requires religious institutes and sponsored ministries to comply with several compensation tax reporting requirements. Most religious institutes and sponsored ministries are subject to at least some of these requirements. This presentation will review compensation reporting requirements for religious institutes and sponsored ministries. Each requirement will address the reporting as it applies to workers and/or employees in general, and how it applies to professed members of religious institutes. Topics to be presented will relate to Form 941 and FICA, Forms W-2 and W-3, Form 1099-MISC and Form 1099-NEC, and the USCCB/RCRI joint memorandum on the compensation of religious.

2:00 PM – 3:30 PM  
**SESSION 3**

   – Tom Drez

This session will dive into the various cybersecurity threats to your computers and mobile devices. We will discuss the need for secure passwords, dual authentication, and privacy protection. We will explain ransomware, phishing, smishing, and malware, and give real-life examples of what issues these threats can cause to your organizations. We will also cover educating members of your organizations on what they can do to prevent cybersecurity threats.
12. **A Reconfiguration Hit Parade: The Twenty Most Important Things Learned So Far in the 21st Century about the Civil Reorganization of Religious Institutes**
– Kenneth Alderfer, Miriam Foley & Mark MacDougall

This workshop will discuss the twenty most useful strategies and tools that have been developed in dozens of civil transactions involving religious institutes during the first two decades in the 21st century. Some may be fairly obvious, and some may require some explanation. If experience really is the best teacher, this workshop is intended to distill the most important and practical lessons of the past two decades into an hour of lively and interactive discussion.

13. **Advanced Topics in Accounting**
– Josh Jarvie, Kellie Ray & Jeff Zeleji

Overview of Variations in Accounting and Reporting
New and Emerging Issues:
- Leases
- Emerging Tax Filing Requirements
- Other New Standards

Challenges (for example):
- Contributed Use of Facilities
- Revenue Recognition
- Below Market Leases
- Identifying Restricted Revenue
- Lawsuit Liabilities
- Imputed Interest
- Charitable Trusts
- Alternative Investments
- Reporting Entity
- Related Parties and Consolidations
- Online Banking and Other Key Controls
- Tax Implications of Alternative Investments
- Other
14. **From Liabilities to Assets: Reimagining Religious Property**  
   – Madeline Johnson & David Murphy  
   An old adage says that ‘we shape buildings, and buildings shape us.’ As religious institutes deal with fewer vocations and new ministerial priorities, how are older religious properties built in yesteryear shaping these orders spiritually and practically today? Notre Dame’s Church Properties Initiative invites you to join a dialogue looking at the intersection between mission and property to explore how orders can view property not as a liability, but as a social, environmental, fiscal, and spiritual asset.

15. **How Diverse is Your Investment Portfolio?**  
   – Suzanne M. Bernard, CFA, CAIA  
   Now, more than ever, institutions are focused on enhancing diversity, not only within their organizations but also within their investment portfolios. This workshop will guide the discussion on how to define what diversity means and how it can be measured over the long term. Furthermore, this session will explore the progress made with institutional investor adoption of diverse managers, and provide a framework that goes beyond a single metric of firm ownership when examining an organization’s diversity commitment.

4:00 PM – 5:30 PM  
**SESSION 4**

16. **Navigating Immigration Challenges for International Religious Workers in the United States**  
   – Graciela Mateo & Miguel Naranjo  
   This workshop will review the R-1 religious worker visa program and current issues with processing,
and visa appointments. Panelists will discuss strategies and best practices to address the challenges of obtaining the R-1 visa and maintaining legal status in the U.S. Also, religious worker permanent residence will be discussed.

17. **Keys to Envisioning, Creating and Sustaining a Successful Investment Strategy**
   – Eileen Alexanderson, Zela Astarjian, Mary Burke & Sr. Suzanne Brennan, CSC

In this dynamic educational session members will gain valuable ideas for securing the future of their Catholic institutions by improving board and committee governance structures and applying best-practice investment principles. This workshop will feature a religious leader from the RCRI community, a board member, as well as an investment consultant who specializes in religious investing. Together, we will explore how religious institutes can align their investment approach with their Catholic beliefs and unique missions.

18. **Common Life: Its Values and Spirit Foundational to Living Consecrated Life within Religious Life**
   – Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP

The presentation will explore Common Life, often called “Community,” which is at the heart of living the collective consecrated life as described in both Canon Law and each institute’s proper law. Each member, by profession, bears fundamental obligations to contribute to the building up of the Common Life and, in turn, receives rights that are part of the Common Life. The well-being of an institute depends on the members living the Common Life intentionally, paying attention to the impact of their choices on the life of the whole. The session will present the scope of
expectations involved in living the Common Life, and then apply these expectations to situations to help participants deepen in understanding the cost/demands of living the fullness of the Common Life.

19. **Navigating the Future of Community and Care Needs: The Franciscan Sisters of Perpetual Adoration’s Journey**  
   – Sr. Sue Ernster, FSPA & Julie Heiberger  
The Franciscan Sisters of Perpetual Adoration (FSPA) in La Crosse, Wisconsin, were faced with a familiar challenge: How do we bring our Sisters together in one home as our numbers decrease? We will explore FSPA’s efforts to consolidate their assisted living and care needs by remodeling their existing Motherhouse to bring their community together for the future. They’ll share insights into their planning, design, and construction efforts as you consider securing your own community’s future.

20. **Employees in Ministry: Making Sense of Administrative Rules and Judicial Cases in Practice**  
   – Jennifer Gniady  
Alongside religious and volunteers, employees increasingly carry out our ministries. But managing employees in ministry presents unique challenges and significant nuances in areas such as job descriptions, anti-discrimination law and regulation, taxes, and unemployment matters. This workshop will look at those areas with a focus on the role of the ministerial exception. The goal is real-world practice informed by an awareness of religious exemptions, as well as understanding how to communicate these practices to employees.
21. Civil and Canonical Perspectives on an Ever-Changing Legal Landscape for Sexual Abuse Claims
   – Michael Airdo, Sr. Sharon Euart, RSM
   & Christopher Fusco

Religious institutes face significant challenges in responding to and investigating sexual abuse claims, given the rapid changes in both the civil and canonical landscapes surrounding such claims. Further in recent years, there has been increased attention paid to the topic of abuse of vulnerable adults, which has led to added confusion amongst religious institutions as to how to handle such claims. This workshop will offer a variety of perspectives on the challenges of handling cases involving abuse of minors and vulnerable adults. Panelists will identify and discuss some specific mechanisms, techniques, and best practices for responding to and, potentially, preventing such claims, including the development of written policies, identifying who is considered a vulnerable adult under canon and civil law, the utilization of external review boards, and other best practices for investigating and resolving all types of abuse claims.

22. Private Impact: Aligning Capital with Environmental and Social Objectives
   – Michael Boensch, Ellen Hazen
   & Sr. Carol Lichtenberg, SNDdeN

More institutions are exploring how they can actively use their financial resources to care for the earth, ameliorate housing and food insecurity, combat climate change, and food insecurity, combat climate change, and improve human dignity. Private impact
investments can serve a valuable role in a religious institution’s portfolio, but it is important to evaluate how any such investment fulfills both mission and financial objectives. The panel will teach attendees how to evaluate private investments from both a financial structure and impact perspective.

23. **Spiritual Practices for Challenging Times**  
   – Anne Kertz Kernion  
   COVID-19 changed our world in many ways, creating challenges impacting all of our lives and communities. This workshop will explore spiritual practices that support and nourish our health and well-being. We will uncover the wisdom of Gratitude, the calm generated with simple Breath exercises, the restorative benefits of appreciating Nature, and the nurturing cultivated through Self-Compassion. Insights from neuroscience and positive psychology will be incorporated into the presentation, as well as opportunities to experience these practices.

24. **How and Why Religious Organizations Need to Implement Best Practices In Risk Management of Insurable and Uninsurable Exposures**  
   – Stephen Waldorf  
   In this workshop, we will examine best practices of a large organization that has the resources to understand the various risks and exposures they have and what they aggressively can do to mitigate these exposures from loss. This process will address where insurance can be used, and other practices where insurance is not an option. With this level of information, we will transition to show how a religious order with little-to-no resources can still implement a solid risk management platform to mitigate and/or avoid losses from taking place.
25. **Advanced Topics in Accounting**  
   – Josh Jarvie, Kellie Ray & Jeff Zeleji  
   (Repeat of workshop 13)

**SESSION 6**

26. **Discerning Hearts Need Accurate TRENDS**  
   – Bethany Jaeger, Sr. Hertha Longo, CSA & Kate Ward  
   TRENDS is the best planning tool available to religious institutes when comparing future needs with current resources to determine when a religious institute has “enough” to sustain mission and care for members long term. While membership projections are uncannily accurate, the financial projections depend on many assumptions and on the accuracy of data. This workshop will offer tips for evaluating TRENDS assumptions and data sources. Examples will demonstrate how to apply TRENDS projections to major decision-making processes.

27. **Sponsorship in Jeopardy**  
   – Mark Chopko & Michael O’Mara  
   Recent litigation between Southern Methodist University and its sponsoring Conference (like a diocese) of the United Methodist Church has raised more than eyebrows about the enforceability of longstanding religious expectations. Among others, the Conference had rights to approve trustees and real estate transactions. But the Methodist Conference lost its attempt to prevent SMU from divorcing its sponsor. Using that case as a lens, this workshop will explore the relationships between sponsors and ministries, and practical tips for assuring traditional expectations are respected (even by the secular courts).
28. **Fraud Prevention and Detection: Leading Practices to Protect Your Not-for-Profit**  
   – Laurie Horvath, Ellen Labita, Kevin O’Connell, Krista Pankop & Timothy Schroeder  
   Baker Tilly helps protect organizations of all sizes from fraud and other control concerns. At this workshop, we will share trending fraud examples, and hold an interactive session presenting quick solutions to optimize protection for organizations. We will walk through before-and-after examples of enhanced accounting systems that have helped prevent current fraud types without additional expense or employees and will discuss best practices for raising the risk of fraud with boards and stakeholders.

29. **Applying Catholic Social Teaching to Advance Racial Equity in the Portfolio**  
   – Lisa Hinds & Courtney Wicks  
   Learn about how investors can apply Catholic Social Teaching themes to promote racial justice through shareholder advocacy and mission-aligned investing practices. For example, the principles of Care of Creation and the Dignity of Work inspire shareholder advocacy on environmental justice and workers’ rights in the supply chain. Investing with diverse managers is a practice through which institutions can show Solidarity with professionals who face high barriers to entry and racial bias in financial services.

30. **Keep It Simple, (Insert Position Here): A Leader’s Guide to A Successful Development Program**  
   – Leslie B. Mollsen & Chad McEachern  
   The funding needs of our Catholic institutions are greater than ever before and growing. How will your development efforts meet the challenge? If you are ready to build a culture of philanthropy for your institution, come join us! Whether you are a leader
of a community/congregation of women or men, or a lay leader of a sponsored ministry, attendees will take home easy strategies they can immediately implement to begin the process of transformational giving. Donors want to help, and your institution deserves it, so keep it simple, (sister, father, brother or lay leader); help is on the way!

2:00 PM – 3:30 PM

SESSION 7

31. Copyright Claims Against Religious Institutes
   – Michael Airdo & Mollie Werwas

   If a religious institute pulls images from the Internet for use in its newsletter, website, or other marketing materials, that institute may be opening itself up to a claim for money damages under federal copyright law. Additionally, just as it has become easier in the digital age to inadvertently infringe upon another’s copyright, it has also become easier for copyright holders to enforce their copyrights. Copyright enforcement has become a growing industry. This presentation will provide an overview of federal copyright law, discuss best practices for protecting religious institute's copyrights and avoiding potential copyright infringement, and provide guidance as to how to respond in the event a religious institute is contacted by an individual or entity claiming that their copyright has been infringed.

32. Managing Transitions for Religious Institutes
   – Mary Kessler

   With Covid issues now the new normal, religious institutes can look at another challenge: the integration of new leader teams and new staff. You may be among those who wish for a solid transition plan to help orient new members of a leadership
team, office or department. New congregational leaders and new staff are often skilled in their area of expertise, yet unfamiliar with ways to work with their new colleagues work within a religious congregation environment. Orientation and transition plans are critical to success but often missing or not well carried out. This workshop will look at practical ways and helpful tools to create a transition plan designed to manage expectations and speed up the integration process for new or existing leadership teams or staff.

33. **Incorporating the Values of the Sustainable Development Goals into Your Portfolio**
   - Ruadhri Duncan, Nicole Johnson-Barnes, Therese Kieve & Nicole Roman-Bhatty

As Mission-Aligned investing has evolved, the Sustainable Development Goals provide a framework for impact investing. We will discuss: 1. Utilizing the values of the SDGs to frame your Congregation’s Impact Investment Policy Statement and how that translates to the underlying investments of the portfolio; 2. How managers can incorporate these values into their investment philosophy; 3. How managers actively engage the companies in the portfolio to drive positive change on behalf of the congregation; and 4. How to measure the impact on companies/society driven by your portfolio.

34. **Using Property to Respond to the Call**
   - Erin George, Sr. Maribeth Larkin, SSS, Sr. Mary Pellegrino, CSJ & Samantha Wild

Explore a variety of options to plan proactively and strategically to use your property to respond to urgent needs of these times in practical and visionary ways. Hear a Community Leader share her community’s journey to creative collaboration with a local eco-justice organization to leave a lasting legacy of
environmental and social justice. Topics include: Collaborations, ecological initiatives, land trusts, senior housing, due diligence activities, and more. Components include: Sample scenarios, Panel Q and A.

35. **Tax and Group Ruling Updates for Religious Institutes**
   - Madeline Obler
   
   This session will address current tax developments applicable to religious institutes, including recent changes to the United States Conference of Catholic Bishops’ group ruling and filing procedures. This is essential information for religious institutes listed in the Official Catholic Directory.

3:45 PM – 5:15 PM  
**SESSION 8**

36. **What Do the Revised USCCB SRI Guidelines Mean to Your Institution?**
   - Raymond Burnell, Christopher Cox, Sr. Sue Ernster, FSPA, Kathryn McCloskey & Fr. Séamus Finn, OMI

   The USCCB’s promulgation of revised Socially Responsible Investment (SRI) Guidelines recognizes the need to bring the Gospel to the world of investments. The updated Guidelines provide an opportunity for all Catholic entities to refresh their efforts in faith consistent investing. Here, a panel of ICCR members will address what is new in the guidelines, how Catholic congregations and institutions can implement the revised guidelines according to their mission and charism, and what this means for their fiduciary duties.
37. The Dance of Change: Two Steps Forward and One Step Back
   – Sr. Eileen McCann, CSJ & Sr. Ruth Plante, OSBM
   Whether you are dealing with what to do with your property, providing support and care to members or vetting potential partners, dealing with change is often a dance. You begin stepping in one direction and find you need to move to another. Problems occur, toes are stepped on, and we need to change partners. During this workshop we will share our experiences, the challenges we faced, even the mistakes we made and how we learned to dance around them. We often hear about a community’s successes, but we don’t always hear about the many moves that were required to get there. Our goal is to help you better navigate the dance of change so you can put your best foot forward.

38. With These Uncertain Times Will Employees Be Able to Retire Someday?
   – Jim Ceplecha
   The answer is yes, if employers offer employees the necessary tools to save for retirement. This webinar will provide a background on retirement plans, show ways to optimize the design of your plan, and discuss specifics that are related to church organizations. Attendees will gain insight on ways to provide employees with the tools they need to save for retirement.

   – Laura Solomon
   Cross-Border Philanthropy is an area of US law undergoing significant, and constant changes that impact the requirements on and relationships. She will also explain the required documentation, in your
Articles, Bylaws, Board meeting, and financial records and recommend controls to manage risk. All are presented in a user-friendly manner to help you navigate these new and complicated rules between US religious organizations and their mission partners abroad. Failure to comply with these requirements can result in a loss of charitable status for the US charity, and even personal fines and penalties for US directors, officers, and staff members. In this session, Ms. Solomon will review US law, including US Executive Orders, FBAR Rules, OFAC Guidelines, and Treasury Department and Financial Actions Task Force Anti-Terrorist Financing Guidelines. She will also explain the required documentation, in your Articles, Bylaws, Board meeting, and financial records and recommend controls to manage risk. All are presented in a user-friendly manner to help you navigate these new and complicated rules.

FRIDAY, OCTOBER 7th

9:00 AM – 10:30 AM  SESSION 9

40. **Government Programs Update: 2022-2023**
   – Constance Neeson

This workshop will provide a summary of all the changes in government benefit programs for 2022, with a look ahead to pending program changes in 2023. 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). The presentation will also include a discussion on the potential impact of any new or pending legislation on benefit participation for members of religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order.
Michael Airdo

Michael is a founding Member of Airdo Werwas, LLC. His practice focuses on the handling of complex civil litigation matters, including healthcare litigation, the defense of long-term care and assisted living facilities, catastrophic injury claims, municipal matters, and cases involving corporations, not-for-profit entities, educational facilities, and trade associations.

He has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. Mr. Airdo represents mental health professionals and has a wide array of experience in resolving matters through the alternative dispute resolution process. He is a frequent lecturer on topics related to his legal practice, including the legal liabilities that arise in retail establishments, board governance, and fiduciary liabilities, and the legal and pastoral response of child-serving organizations to victims of childhood sexual abuse. He served on the Board of Trustees for the Village of Bartlett from 2001 to 2011 and as Mayor of Bartlett from 2011 to 2013.

Mr. Airdo is a Member of the International Association of Defense Counsel and serves as Midwest Regional Chair of the Membership Committee. He is also a member of the IADC Foundation’s Board of Trustees. He is a member of Leading Lawyers. He received both his undergraduate degree, summa cum laude, and his law degree, with honors, from DePaul University.
Kenneth Alderfer
Kenneth 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.

Eileen Alexanderson
Eileen, consultant at BMT Management & Financial Consultants. With over 35 years of investment management experience, Eileen joined BMT in 2017 to support the manager research process and the needs of BMT’s investment consulting services client base. Having worked in an institutional asset management firm for 24 years, Eileen has also been a longtime member of several Investment Committees for Catholic institutions. Eileen earned a B.S. in Finance at St. John’s University as well as the Chartered Financial Analyst designation.

Zela Astarjian
Zela, Catholic Investment Services, Managing Director, joined CIS in 2018 with responsibilities for consultant and investor relations, marketing, and product development. She has worked in institutional product development and management in both the domestic and offshore arenas covering traditional and alternative investment products. Zela came to CIS from RhumbLine Advisors in Boston, where she was a business development and consultant relations professional. Earlier in her career, she was a
VP of business development for PSolve Asset Solutions (now River and Mercantile), an independent investment consulting firm serving endowments, foundations, and pensions. Zela has also held product development roles with several asset managers such as Bank of America, NATIXIS Asset Management, Scudder Stevens and Clark (currently DWS), and Pioneer Investments. Zela has been involved with several Boston area non-profits. She is a dedicated contributor to 100 Women In Finance. Zela attended L’Institut D’Etudes Politiques in Paris and received her MBA from Fairleigh Dickinson University.

Suzanne leads the Not for Profit team within Northern Trust’s Outsourced Chief Investment Officer. Suzanne and her team work directly with foundations, endowments and other nonprofit entities in the development of complex investment programs. This includes the development of investment policies, asset allocation recommendations, investment manager search, selection and oversight, portfolio construction, and ongoing management of the overall investment program.

Before joining Northern Trust, Suzanne was a Partner at Aon Hewitt Investment Consulting (and its predecessor organization, Ennis Knupp Associates) for over 25 years. During that time, she worked with a wide variety of clients, specializing in those plans with complex alternatives programs. Additionally, she held several leadership roles in the organization, including leading the Not for Profit Practice and the Alternatives Investing Practice (hedge funds, private equity and real assets). Prior roles included the development and management of the firm’s hedge fund research platform. She has written research papers on issues facing institutional investors, such as using opportunistic strategies in an investment program, of real estate, and alternatives benchmarking. Suzanne received
her Bachelor of Science degree in Finance from the University of Illinois Champaign and her Masters of Business Administration in Finance from the University of Chicago. She holds the Chartered Financial Analyst (and Certified Alternatives Investment Analyst designations. Additionally, she has served as a Board member of the Children's Home Aid Society of Illinois over the past decade and is currently the Chair of their Foundation.

Michael Boensh, CFA, CAIA

Michael is responsible for the leadership of F.L. Putnam’s investment manager research effort within Atrato Consulting across all investment strategies. Before joining FLP, Mike was a partner and the Director of Research at Atrato Advisors LLC. Mike has over 15 years of investment research experience covering private and public markets strategies, including hedge funds, private credit, private equity, and real estate. Before joining Atrato, Mike was a senior analyst at Gleacher Fund Advisors LLC, where he performed qualitative and quantitative analysis on the entire spectrum of hedge fund strategies, sectors, and geographies. Previously, Mike was an analyst with CSM Capital Management, a multi-family office that invested across traditional and alternative asset classes.

John Bolton

John, Senior Consultant. Mr. Bolton joined Concord as an analyst in 2011 in the role of portfolio oversight. During John’s tenure, he managed a client service team before moving into relationship management. In 2018 John earned the Senior Consultant designation. John is a senior member of Concord’s Consulting team, servicing clients across the firm. Mr. Bolton holds a B.S. in Finance from Wake Forest University, Wayne Calloway School of Business and Accountancy. Before joining Concord, Mr. Bolton was employed by Investors Savings Bank and Metropolitan Life.
Sr. Suzanne Brennan, CSC

Sr. Suzanne, Sisters of Holy Cross - Sister Suzanne taught in Illinois and Indiana before entering various social service ministries. In South Bend, Indiana, she served in several social services agencies including Northern Indiana Children’s Hospital, Madison Center Community Mental Health Center, and La Casa de Amistad. Sister Suzanne later served at Holy Cross Hospital in Salt Lake City, Utah as Chief Operating Officer. She later served as president and CEO of Our Lady of Mercy Hospital in Cincinnati—a position she held for five years—and as president and CEO of Providence Hospital, Anchorage, Alaska. In partnership with Catholic Community Services of Utah in Salt Lake City, she launched a business for area residents who were homeless, which prepared them to start their own small businesses. For 16 years, Sister Suzanne also held the position of executive director of Holy Cross Ministries in Salt Lake City and outreach program for immigration and education. Sister Suzanne was elected to her current role with the Congregation’s General Leadership Team in 2014. She graduated from Saint Mary’s College with a Bachelor of Arts and earned her Master of Social Work from Loyola University. She also earned a master’s degree in public administration and finance from Roosevelt University in Chicago.

Mary Burke

Mary, Partner at Lakeshore Food Advisors, has over 25 years of investment banking experience within the food industry specializing in financial restructurings, recapitalizations, turnarounds, and private and public placements of debt and equity capital and providing corporate finance and strategic advisory services. She has been the advisor on more than 200 recapitalizations, placements, mergers, acquisitions, and divestitures representing total consideration of over $15 billion. Mary is a founding partner of Lakeshore Food Advisors, LLC which is a boutique investment banking firm focused exclusively
on the agribusiness and food space. Previous to Lakeshore, Mary worked for a variety of companies all in the food sector. She was a partner at The Food Partners, a boutique investment firm specializing in the retail and wholesale sectors of the food industry. She was chair of the board and interim chief executive officer at Associated Grocers, Inc. of Seattle, a $1 billion cooperative grocery wholesaler. She was a chief financial officer at Imperial Sugar Company (OTCBB: IPSU), the largest refined sugar supplier in the United States, and helped the company grow through acquisitions from $400 million to $2 billion in sales. Mary was a managing director at Bank of Montreal/Harris Bank’s Food Group specializing in input, manufacturing, processing, distribution, and retail companies. Mary has a B.A. from Saint Mary’s College, Notre Dame, Indiana, and an M.B.A. from the University of Chicago Booth School of Business.

Raymond Burnell
Raymond is a Director of Catholic Responsible Investments for Christian Brothers Investment Services (CBIS). Before working with CBIS, Ray provided a decade of service to the California Catholic Conference of Bishops as the Director of Education & Environmental Stewardship. In this capacity, he led public policy advocacy on K through College education issues as well as integral ecology issues. Ray began his professional vocation as a Catholic high school teacher and then became a school principal for 18 years. During this time, he paused for four years to serve as an Assistant Secretary of Education for the United States Catholic Conference of Bishops.

Jim Ceplecha
Jim, Defined Contribution (DC) Plans. Jim has 37 years of experience working with Catholic organizations, with the last 29 of those years overseeing the defined benefit and defined contribution plans for Christian Brothers Services.
In 2021 Ceplecha transitioned to his new role of Executive Director, Defined Contribution (DC) Plans at Christian Brothers Services. He is a Fellow of the International Society of Certified Employee Benefit Specialists.

Mark Chopko

Mark chairs Stradley Ronon’s nonprofit & religious organizations practice group, which brings together 25 lawyers from across the firm’s many legal disciplines to serve the unique needs of those clients. He joined the firm in 2007, after serving for more than 20 years as general counsel for the U.S. Conference of Catholic Bishops (USCCB) and nearly eight years as a regulatory attorney in Washington, D.C. He has extensive experience in untangling the liabilities of complex organizations, in both planning and organizing activities, and litigation. Mark has represented clients across the country, and from Europe to the Pacific Rim. A major emphasis of his practice is constitutional law and deflecting attempts by the government to regulate the activities of religious institutions. This work includes creating and adapting civil structures that reflect the mission of the organization, but also that separate and protect the operations and mission of the organization. He also has more than thirty years of experience in defending claims of professional misconduct by clergy and staff of religious and nonprofit institutions, including evaluation and mediation of those claims. In addition to his appellate and Supreme Court work for clients of the firm, Mark has participated in more than 30 Supreme Court cases as counsel for the Catholic Bishops, as well as other religious groups, in friend-of-the-court briefs. He is also nationally known for his work on the liability of nonprofit entities and the protection of religious institutions. Mark’s work has been cited in articles and court opinions more than 300 times.
Sr. Nancy Conway, CSJ

Sr. Nancy is a member of the Congregation of St. Joseph and serves as a facilitation and engagement specialist with Hoffman Planning, Design & Construction. A native of Cleveland, Nancy entered the Congregation of St. Joseph (the founding congregation) there in 1966. Her educational background includes a Bachelor of Arts in Spanish, a Master of Science in Social Administration, and a Ph.D. in Organizational Development. Nancy’s ministry experience includes teaching at the high school level as well as performing social work for both a hospital and a women’s agency. Nancy also has 28 years of experience in organizational consulting/facilitation. Nancy was elected President of the newly-formed Congregation of St. Joseph (the union formed in 2007 by the coming together of seven independent CSSJ congregations). She served in that capacity for 12 years. During that time, she helped guide and facilitate the Congregation’s discernment process regarding the future of its buildings and land in six states. With more than 50 years of experience in religious life, Nancy has been invited to present multiple times at the RCRI National Conference.

Christopher Cox

Christopher is the associate director of Seventh Generation Interfaith Coalition for Responsible Investment. Chris also led the Human Thread Campaign, a program of Seventh Generation Interfaith, to raise awareness, direct action, and build solidarity with garment workers. Previously, he served in multicultural and low-income communities in the U.S. and Latin America. He earned an M.Div. and a B.A. (Program of Liberal Studies/ Theology) from the University of Notre Dame.
Sr. Sue Ernster, FSPA

Sr. Sue is a member of the Franciscan Sisters of Perpetual Adoration currently serving as the Vice President and Treasurer (CFO) for the community. She has been involved in the Congregation’s investing and shareholder advocacy for many years. She has engaged Seventh Generation, ICCR in her congregation’s engagements. Sr. Sue has a background in accounting, as well as ministry, serving as congregational treasurer for nine years.

Tom Drez

Tom, 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 LionsClubs International.

Ruadhri Duncan

Ruadhri has over 20 years in the fund management industry where he has operated as both a fund manager and a charity trustee. After leaving the Army he started work with Leopold Joseph and Sons where he completed
his fund management exams. In 1999 he moved to Newton Investment Management, where he worked within the charities department for over 12 years, managing a wide range of charitable funds. Ruadhri joined Sarasin in 2011 and is an associate of the Chartered Institute for Securities and Investment as well as holding several charity trusteeships. He is an Associate of the Chartered Institute of Securities and Investment.

Sr. Sharon Euart, RSM, JCD

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

Mary J. Foley

Mary, Managing Director, Mission Advancement/Catholic School Management, Christian Brothers Services. Mary 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 National Catholic Development Conference, 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

Miriam 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 that operates globally to benefit women and girls.
Christopher J. Fusco, JCL, Esq

Christopher is the Associate General Counsel and Tribunal Moderator and Judge for the Diocese of Metuchen. He is also the Associate Director for Civil Law at the Resource Center for Religious Institutes in Silver Spring, Maryland. Christopher holds a master’s degree in religious studies and a licentiate degree in canon law from The Catholic University of Louvain in Belgium. He also holds a master’s degree in music from The New England Conservatory of Music in Boston, Massachusetts. Christopher received his Juris Doctor degree from The City University of New York School of Law and clerked for Judge Thomas H. Dilts of The Superior Court of New Jersey. Christopher is admitted in New York and New Jersey and has been admitted to practice before all federal trial and appellate courts of those jurisdictions, as well as the US Court of International Trade, the US Tax Court, and the US Supreme Court.

Erin George

Erin is a principal at Plante Moran Real Estate Investment Advisors, Erin leads the firm’s religious institutes service group. She assists religious communities and their ministries to develop a holistic and comprehensive vision for the future, within the context of their mission, which includes considerations for resource planning and the development of organizational structures that will support the desired vision. Erin brings her experience in working with numerous religious institutes, not-for-profit organizations, and senior living providers in the areas of strategic planning, organizational transition, planning for the care and support needs of members, assessment of available resources, identification of opportunities for collaboration or partnerships, and organizational and staffing analyses.
Rev. Séamus P. Finn, OMI

Rev. Séamus is the Director of the Justice Peace and Integrity of Creation Office of the Missionary Oblates of Mary Immaculate and is responsible for the Faith Consistent Investing program for the Oblate Investment Pastoral Trust. The JPIC office works on advocacy in the public sector at the national and international levels and in the private sector through active shareholder ownership of shares in corporations. He represents the Missionary Oblates (OMI) at the Interfaith Center on Corporate Responsibility where he recently served as the board chair. He participates in various roundtable multi-stakeholder discussions with individual companies and on faith-consistent investing across different industry sectors. He is a speaker at conferences and symposia convened at the Vatican and other international faith forums on the Sustainable Development Goals, impact investing, and the promotion of responsible mining for the Common Good.

Jennifer Gniady

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

Ellen, Chief Market Strategist, and charter holder, F.L. Putnam; is responsible for communicating the firm's market and investment strategy and is the lead portfolio manager on the firm's Catholic Values equity strategy. In her role as chief market strategist, Ellen has a range of responsibilities that includes market and economic analysis and investor education. Ellen has over 25 years of industry experience. Before joining F.L. Putnam, she spent 13 years as a sector portfolio manager and senior equity research analyst at MFS Investment Management and served on the Research Management Committee and the Diversity Committee. Ellen previously held positions at Putnam Investments, Goldman Sachs, and Morgan Stanley. Ellen is involved with several non-profit organizations focused on women in the investment management industry, including Investing In Girls (IIG) and Smart Woman Securities (SWS).

Julie Heiberger AIA NCARB LEED® AP

Julie is the religious market leader and a senior project architect/owner 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’s religious/senior care living environments, Julie has been invited to speak at several past RCRI National Conferences. A registered architect in Wisconsin and a National Council of Architectural Registration Boards certificate holder, Julie also holds accreditation through U.S. Green Building Council’s Leadership in Energy and Environmental Design (LEED®) program. She received her Master of Architecture
from the University of Wisconsin–Milwaukee, where she also spent time as an adjunct professor of architecture.

Lisa Hinds

Lisa leads all Client Engagement & Sustainability activities for Xponance. She is a member of the Management, Investment Governance, and ESG Committees and has over 30 years of experience in the Investment Management and Financial Services industry. Before joining Xponance, Lisa managed the endowment and foundation business for EnTrust Global, where she was responsible for building portfolios of opportunistic co-investments, private debt, private equity, and hedged strategies. Previously, she led corporate development and client portfolio management for a distressed hedge fund and a private equity firm focused on sustainable investing. Ms. Hinds has also served in senior roles with Morgan Stanley, Standard and Poor’s, and Bear Stearns, starting her career with GE Capital. Ms. Hinds holds an MBA from the Fuqua School of Business at Duke University, a Master of Arts in Law and Diplomacy from the Fletcher School at Tufts University, and a Bachelor of Science from Northeastern University.

Laurie Horvath, CPA

Laurie, Partner, Baker Tilly, 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.

Darrin Hull, EVP

Darrin, EVP, Consulting. As executive vice president of consulting for Health Dimensions Group, Darrin Hull leads HDG’s nationwide consulting practice, provides operational turnaround support and project oversight
to clients, and serves as an industry thought leader. Mr. Hull is also responsible for researching, identifying, and securing business development opportunities, including care community management and leases. Mr. Hull’s background includes more than 30 years of multi-site post-acute operations management experience, with particular emphasis on large-scale nursing centers. In 2018 and 2019, Mr. Hull served as the primary oversight agent for one of Wisconsin’s largest receivership transfers, which included the management and turnaround of 24 skilled nursing facilities and 9 assisted living facilities. Previously, Mr. Hull held multi-facility oversight positions with the nation’s largest post-acute providers, including Kindred Healthcare and Beverly Healthcare. He also organized and founded a consulting services company in 2007 to assist owners/operators in the business of senior health care services.

Sr. Lynn Jarrell, OSU, MA, JCD

Sr. Lynn 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 Masters 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 to 2008, Lynn was the Associate Director for Canonical Affairs at the Resource Center of Religious Institutes (the predecessor of LRCR) 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 an author or editor. Lynn served in the Tribunals for the Diocese of Evansville, Indiana (1984-1988) and the Archdiocese of San Francisco, California (1997-2001). Lynn has served on the Board of the Canon Law Society of America as Consultor, 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 the institute through the planning and implementation process of coming to completion.

Josh Jarvie

Plante Moran. For more than 11 years, Josh has provided assurance and consulting services to a variety of not-for-profit organizations, focusing on working with religious clients as over 75 percent of his clients are denominational. He manages the overall audit process, ensuring that the teams work collaboratively to deliver quality and efficient service. Whether in person or through virtual video calls, he is a resource who is a phone call away to collaborate on upcoming accounting changes, talk through organization-specific questions, and be a trusted advisor to clients in all aspects of their operations. Ultimately, he assists his clients navigate their unique accounting challenges to best serve their mission. He is part of Plante Moran’s professional standards team and performs quality reviews of financial statements and presents at internal and external training. He is also part of Plante Moran’s Benefit Plan Audit Specialist (BPAS) group, which means he is qualified by the firm to review and provide specialized guidance in the benefit plan practice. He has been a presenter at the Resource Center for Religious Institutes’ National Conference for several years.
Bethany Jaeger

Bethany is the principal of KEB's management consulting practice based in Springfield, Illinois. She specializes in long-range planning processes for religious institutes. These processes often intertwine decisions about property stewardship, sponsored ministries, care of members, and other forms of transformation.

Madeline G. Johnson

Madeline, Program Manager, Church Properties Initiative. Maddy Johnson is the Program Manager for the Church Properties Initiative at the Fitzgerald Institute for Real Estate. Before joining FIRE, she was a research analyst in capital markets at CBRE. A native of Minneapolis, Maddy holds a B.A. in philosophy from Hillsdale College and a Master of Urban Planning degree from McGill University, where her research focused on church properties. She is an alumna of the French Embassy's Teaching Assistant Program in France (TAPIF).

Nicole Johnson-Barnes

Nicole is a senior research analyst for Marquette Associates and has 16 years of investment experience. She joined the firm in 2018 and is responsible for conducting due diligence on global equity products and managers, as well as developing macroeconomic and capital markets research. She is a co-lead of the firm's sustainable investing group and is a member of the firm’s OCIO committee and traditional investment manager search committee. Prior to joining Marquette, she was a vice president and senior consultant for Mesirow Financial. Previously, she worked at Northern Trust Asset Management as a second vice president. She began her career as a financial advisor with Ameriprise Financial Services, Inc. Nicole holds a B.B.A. with emphases in finance and corporate strategy from the University of Michigan. She is a member of Women's Investment Professionals, Chicago. Nicole is a CFA charter holder and a member of the CFA Institute and the CFA Society of Chicago.
Anne Kertz Kernion

Anne 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. She has a 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.

Mary Kessler

Mary 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.

**Therese Kieve**

Therese started in the industry in 2008. Prior to joining Sarasin & Partners in 2019, Therese worked as a Senior Research Analyst at Institutional Shareholder Services Inc. (ISS), a provider of governance and responsible investment solutions to the financial community. Prior to ISS, she worked at ShareAction, a UK organization that promotes responsible investment. Therese has also previously worked as Senior Manager, Pensions and Insurance, Group Market Risk at Lloyds Banking Group. As a senior risk professional, she had independent oversight of key market risks including equity risk, interest rate risk, inflation risk and foreign exchange risk arising from the Group’s Insurance and Employee Pension Programs. Therese has an MSc in Corporate Governance and Business Ethics from the University of London, a BMath in Actuarial Science from the University of Waterloo, Canada and is a Fellow of the Institute and Faculty of Actuaries (IFOA).

**Ellen Labita, CPA**

Ellen, Partner, Baker Tilly. Ellen 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.

Sr. Maribeth Larkin, SSS

Sr. Maribeth is the current General Director of her community, the Sisters of Social Service and from 2005 to 2010 she was a member of the General Council. Prior to her current role, she was in ministry as a community organizer assisting institutional leaders from churches, synagogues, schools, and unions in learning how to develop relational power and engage in a process of practical democracy. In this ministry, she taught ordinary people how to shape and influence public policy around issues including social justice, education reform, and health care availability. She has served on the National Staff of the Industrial Areas Foundation in the US and regularly assisted with national and regional training. She has led organizing efforts in Los Angeles, New York, El Paso, San Antonio, Dallas, and Australia. Under her leadership, the SSS community has engaged in multiple experiments related to environmental sustainability by actively using its property in Encino, CA. A primary example of this is the construction of a biophilia tree on the campus in collaboration with Pando Populus and UCLA.

Dayna Larson-Hurst

Dayna has worked in and with Catholic organizations for the past 23 years. Her work now is focused on consulting, coaching, and supporting religious communities as they develop and implement strategic initiatives. Her passion as she works with the communities, is to find innovative ways that will support their mission, charism and each other so they continue to live meaningfully into the future. She is currently an adjunct staff member with the NRRO as well as a consultant for Catholic religious congregations.
throughout the United States. She is also a national speaker on such issues as dementia, well-being and aging, leadership development and strategic planning. Dayna is a registered nurse with a BS in Business and a master’s degree in Organization Development.

Sr. Carol Lichtenberg, SNDdeN

Sr. Carol is a Sister of Notre Dame de Namur of the Ohio Province. After completing two terms as province leader, she is a full-time volunteer serving the Ohio Province and OneSource Center for Nonprofit Excellence. Carol is a native of Cincinnati, Ohio who loves German cuisine. Carol began her ministry as a high school teacher and principal in Dayton, Ohio. She served in various roles for the Ohio Province before becoming provincial. Her longest tenure was 20 years as the CFO of the Ohio Province. Carol is well acquainted with RCRI having been a member of NATRI/RCRI for 20 years and serving on the NATRI Board when RCRI was formed. Carol passionately believes in the necessity for religious congregations to align asset management with the mission.

Sr. Hertha Longo, CSA

Sr. Hertha is General Treasurer and a member of the Board of Directors for the Congregation of Sisters of St. Agnes. As General Treasurer, Sister Hertha is responsible for stewarding the finances and properties of the Congregation.

Br. Lawrence Lundin, SJ

Br. Lawrence joined the RCRI office in 2013 and is the Associate Director for Administration and Finance. After joining the Jesuits in 1966, he received a degree in accounting from the University of Louisiana at Lafayette, and an MBA from Loyola University New Orleans. He worked in Jesuit community administration for many years including five years at the Jesuit Conference (Office) in Washington. He completed 22 years as New Orleans
Province treasurer in June 2012. He has worked with over 20 religious institutes on TRENDS and/or financial planning. This includes active and contemplative communities, and men’s and women’s institutes.

Mark MacDougall

Mark 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 to programs sponsored by the Resource Center for Religious Institutes.

Melody Maravillas, CFO

Melody, 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 the management of its investments. Prior to the Sisters of St. Joseph of Peace, she was the CFO of the Jewish Federation of Northern New Jersey. She has presented on the Congregation’s mission-aligned investments and impact investing efforts in the past.

Graciela Mateo

Graciela is the Senior Attorney of the Religious Immigration Services (RIS) section of the Catholic Legal Immigration Network, Inc. (CLINIC). She has been with CLINIC in its RIS section since 2017 practicing exclusively in the area of religious immigration law. CLINIC currently represents over 100 religious organizations assisting them in bringing international priests, brothers, sisters, novices, seminarians, and other religious workers into the U.S. to serve the Church. Ms. Mateo has been practicing
immigration law since 2018. She is a graduate of the University of North Carolina at Charlotte and Charlotte School of Law.

Sr. Eileen McCann, CSJ

Sr. Eileen has been a member of the Sisters of St. Joseph of Carondelet: Albany Province for 55 years. She served on her Province Leadership Team from 2008 to 2020. Presently, she is serving as Congregational Vocation Promotor for her congregation. Her ministerial career spans education, religious education, restorative justice and youth and young adult ministry. She holds an undergraduate degree in Education from the College of St. Rose and graduate degrees in Education from SUNY Oswego and Religious Education from Boston College. Sr. Eileen worked at the US Conference of Catholic Bishops serving as a consultant to the Bishops for Youth and Young Adult Ministry. She has served as the Chair of her Province’s Property Stewardship Group since its inception; first, as the liaison from the Province Leadership Team and then as an at-large member to ensure continuity in the process. It is from this perspective that she will be presenting her workshop.

Kathryn McCloskey

Kathryn as vice president of social responsibility for Mercy Investment Services, is responsible for screening, shareholder advocacy and Mercy Partnership Fund components of the program, as well as Mercy Investment Services’ shareholder advocacy services for nine faith-based organizations. Previously, Katie served as the director, of social responsibility for United Church Funds. Katie has been an active member of the Interfaith Center on Corporate Responsibility, including as a board member. She lives in New York.
Chad McEachern

Chad is the President & CEO of the Edmundite Missions, a Catholic poverty services organization founded in Selma, Alabama in 1937. Chad joined the Missions in 2008 and became its first lay President in 2012. He is a former Chair of the National Catholic Development Conference and currently services as a Trustee of the National Catholic Community Foundation, Chairman of the Board of the Wallace Community College Foundation, a member of the Personnel Board for the City of Selma, and Chairman of the Steering Committee of the U.S. Attorney’s Weed and Seed Committee for Dallas County. Chad has received numerous national and local awards and recognition for his work in Catholic philanthropy and innovative approach to poverty services. He earned his 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

Leslie is the President & Owner of American City Bureau, Inc., a 109-year-old, three-generation national fundraising consulting firm. Leslie joined ACB in 1990 and became its co-owner in 2007. She leads the company’s Catholic Services Division which focuses on philanthropic development for religious congregations and communities of men and women and the ministries they sponsor. She currently serves as a Trustee of the National Catholic Community Foundation (NCCF) and the advisory board of the Catholic Development Council of The Nonprofit Alliance, the voice of nonprofits to promote, protect and strengthen the philanthropic sector. She is a past board member of the National Catholic Development Conference and was 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. Leslie speaks nationwide and is a published author, most recently a chapter in the book: Ask for the World, Catholic Sisters and the Spirituality of Fundraising.

David J. Murphy

David, Program Director, Church Properties Initiative. David Murphy is the Program Director for the Church Properties Initiative at the Fitzgerald Institute for Real Estate. Prior to his appointment, David co-founded QuoVadis Catholic, a non-profit that places young adult Catholic professionals on underutilized Church property. He has consulted parishes, dioceses, and Catholic schools on innovative real estate topics, and is also involved with several Catholic startups. After graduating with a degree in Political Science and a minor in Theology, he served six years on active duty with the U.S. Navy as a helicopter pilot flying the MH-60S before spending a year as a seminarian with the Congregation of Holy Cross.

Miguel Naranjo

Miguel 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

Constance, Director - Benefit Eligibility Management for Religious - BMT, A Division of Christian Brothers Services. Constance 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 13 years, her team has assisted various religious institutes in achieving a total estimated financial impact of over $100 million, in increased income and health care savings, for their congregations, through the 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), Orientation to Management of Religious Institutes (OMRI), and the Regional Congress of Religious Treasurers (CORT) meetings.

**Madeline Obler, Esq**

Madeline is Assistant General Counsel for the United States Conference of Catholic Bishops in Washington, D.C., where she provides legal advice to the Conference and the staff of and attorneys representing thousands of 501(c)(3) Catholic organizations nationwide on matters such as the law of tax-exempt organizations, governance, grantmaking, federal income and social security tax issues for U.S. citizen/resident alien and nonresident alien priests, workers, and students, and employee benefits. Ms. Obler is also responsible for maintaining the Conference's group exemption letter covering approximately 50,000 charitable organizations. Prior to joining the Conference, Ms. Obler was in private practice, focusing primarily on exempt organizations and tax controversy. She received her law degree, magna cum laude, from Elon University School of Law, and her LL.M. in Taxation, with honors, at Georgetown University Law Center. Ms. Obler is a member
of the bars of the District of Columbia and Maryland. She also serves as an adjunct professor for the Georgetown University Law Center’s LL.M. in Taxation program.

Kevin O’Connell, CPA

Kevin O’Connell, CPA, Partner, Baker Tilly. Kevin 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.

Mike O’Mara

Mike is a recognized trial lawyer with Stradley Ronan who focuses his practice on complex and contentious disputes including those involving the firm’s religious and nonprofit clients. He serves on the firm's board of directors and management committee and is a member of the Nonprofit and Religious Organizations Practice Group and the Education Practice Group. Mike’s experience covers a broad spectrum of litigation, including professional liability and misconduct matters, regulatory issues, financial services cases, merger and acquisition disputes, intellectual property litigation, class actions, ERISA claims, trust and estate disputes, and insurance and commercial real estate matters. He frequently represents professional services firms – including Am Law 100 and 200 firms. Mike also counsels several nonprofit organizations, including religious, educational and health care organizations, on a wide variety of litigation-related matters.

Krista Pankop, CPA

Krista, CPA, Partner has been with the Baker Tilly since 1995. She serves as the firm’s not-for-profit network leader, 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 on the board of a sponsored ministry.

**Sr. Mary Pellegrino, CSJ**

Sr. Mary is an integral member of Plante Moran’s religious institute services group. She assists religious communities in facilitating discussions and work related to animating the mission and charism, enhancing the quality of community life, and making the transitions necessary for continuing their mission into the future. Sister Mary’s experience includes serving as the president of her community, the Sisters of St. Joseph of Baden, Pennsylvania, and as the president of LCWR. In that role she has traveled extensively to meet with congregations of religious in the US and beyond. She has met with multiple Vatican Dicasteries to discuss the future of religious life in the US. In her role as leader of her Community, Sr. Mary was responsible for its sponsored nursing home, senior living residence and participation in PACE. Her community has had a long-standing focus on care of earth as one of its core values.

**Sr. Ruth Plante, OSBM**

Sr. Ruth is a member of the Sisters of St. Basil the Great, an Eastern Rite community located in Uniontown, PA. Sister has served in various ministries throughout her years in religious life. She recently completed a term in leadership, serving as Provincial. During this time, she and her team worked closely with NRRO to plan for the future care of the Sisters. The ongoing process involved numerous high points, challenges, disappointments, and setbacks, as well as a call to faith, trust and courage.
**Jon Quigley**

Jon 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 the firm’s Investment Committee and a member of the Management Committee. Before 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. Education and Professional Credentials; Wake Forest University, BA, Northwestern University, MS in Predictive Analytics & Chartered Financial Analyst, CFA®.

**Kellie Ray Partner**

Kellie, Plante Moran. Kellie is a partner with more than 20 years of experience serving not-for-profit and religious organizations in accounting, auditing, tax and management consulting. Kellie serves as the leader of Plante Moran’s not-for-profit practice. She has consulted with various not-for-profit organizations concerning the implementation of new auditing and accounting standards. She serves as the board chair of Covenant House Michigan, a faith-based organization that provides hope to homeless, runaway, and at-risk youth. She is a frequent speaker on topics related to technical issues, board governance, design and implementation of
internal controls, and financial reporting matters. Kellie holds a B.B.A. and Master of Accounting from the University of Michigan Ross School of Business.

**Sr. Nancy Reynolds, SP, MA, JCL**

Sr. Nancy 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 Masters 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 to 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 served a three-year term as the Treasurer of that Society (2016-2019). She served two terms as a member of the Board of the Leadership Conference of Women Religious and in addition 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 present. 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-Bhattynichole is a managing partner for Marquette Associates. An owner of the firm, Nichole has been with the company since 1998 and has 25 years of investment experience. She serves as the primary investment consultant on several of the firm’s relationships. Her primary client focus is on non-profit plans. Nichole is the director of religious services and is also chair of the sustainable investing group as well as a member of the firm’s endowment & foundation services committee. Before 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 ICCR (Interfaith Center on Corporate Responsibility) and a member of the National Association of Securities Professionals (NASP). She serves as the vice president of Leaders Investing for Tomorrow (LIFT), a civic-minded non-for-profit 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.

Scott Santin
Scott, Managing Partner, Chief Compliance Officer, Concord. As one of the founders of the company, Mr. Santin has been with Concord since 1988. Mr. Santin is a chairperson of the Concord Investment Strategy Group. As Managing Partner, Mr. Santin is responsible for oversight of all firm operations, strategy, and compliance. He is actively engaged with clients in a lead consultant capacity, as well as developing investment strategies for all clients. Before founding Concord, Mr. Santin worked for Merrill Lynch, PaineWebber, and Hamilton & Co.
Mr. Santin earned a B.S. degree in Finance from Rider College in Lawrenceville, N.J., and an MBA degree from Rutgers University in Newark, N.J. He has been a lifelong resident of the Princeton, N.J. area.

Timothy Schroeder

Timothy 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 more than 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.

Erin Shvetzoff Hennessey, MA, NHA, CPG

Erin, Chief Executive Officer and Principal, is a certified gerontologist with 20 years of experience in senior health care. As chief executive officer, she provides leadership and direction setting for Health Dimensions Group. As both a strategic thought leader and tactical realist, Ms. Hennessey understands the complexities of moving from volume- to value-driven health care systems. She has considerable experience advising post-acute care providers in the areas of operational performance and financial improvement and the development of health care strategies. Her experience also includes serving as an administrator and senior leader of skilled nursing and senior living facilities in several states. Ms. Hennessey is active in acute, post-acute, and senior services organizations, working to provide them with education resources, industry information, and support for members in the area of senior services. Ms. Hennessey was named a 2019 Senior Living Leader Under 40 by Argentum, a
Laura N. Solomon, Esq

Laura is the founder of Laura Solomon & Associates. LS&A is a law firm devoted to the representation of nonprofit, charitable, and other tax-exempt organizations and philanthropic individuals. Ms. Solomon and her associates serve as outside, general counsel to hundreds of organizations, providing a full range of corporate and tax legal services that include representation for mergers, joint ventures, affiliations, and complex financings. LS&A clients include public charities and private foundations, community foundations, museums, hospitals, schools, religious groups, businesses, environmental, animal welfare, amateur sports organizations, social clubs, and political action committees. These organizations range in size from small start-up organizations to large social service providers and multi-national charities that conduct international grant-making. Ms. Solomon currently serves as a Board member, Secretary, and Chair of the Grants Committee of the Mayor’s Fund for Philadelphia. She is a member of the Charity Working Group of the U.S. Treasury Department and the Tax-Exempt Organizations Subcommittee of the American Bar Association, is a member of the Charitable Organizations Committee of the Pennsylvania Bar Association, and a faculty member of the Nonprofit Institute of the Pennsylvania Bar Institute. She previously served as a United States delegate to the Financial Action Task Force. Ms. Solomon is a Wexner Heritage Program Fellow. Ms. Solomon also lectures at the LaSalle University Nonprofit Center, the University of Pennsylvania, and Villanova, Drexel, and Temple Universities. Prior to starting her firm,
Ms. Solomon was associated with Ballard Spahr Andrews & Ingersoll, LLP. She is a member of the Bar Associations of New Jersey and Pennsylvania and received her B.A., magna cum laude, from Tufts University and her J.D. from the University of Pennsylvania.

Matt Wade

Matt is currently CFO/Treasurer for the Sisters of Charity of St. Augustine in Cleveland, Ohio. He served in congregational finance positions with the Marist Fathers & Brothers in Washington, DC and later worked as CFO for the Medical Mission Sisters in Philadelphia. Matt worked as Associate Director of the Conference of Major Superiors of Men from 2001-05. He also has experience in Latin America, having worked in Peru. He has assisted the NRRO as a consultant for the Planning and Implementation Process. Matt was involved with RCRI’s development committee for the new TRENDS Versions 2013 and 2015 and 2021. He holds degrees in Business Administration from John Carroll University and Religion & Religious Education from The Catholic University of America. He has also previously served on the RCRI Board.

Stephen M. Waldorf

Stephen is a principal partner and managing director of Waldorf Risk Solutions. Graduating from the 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 in 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 aviation and holds multiple certifications including his certification as a flight instructor and flight instructor instrument rating. Although his true passion rests in his love and devotion to his family, four children and his close friends, many of whom are clients.

Kate Ward, CPA
Kate is a partner at KEB with over 20 years of experience working with religious communities and their related ministries. Kate is a certified public accountant who has assisted religious communities with audit and review services, financial reporting guidance, reconfiguration consulting and management consulting, including the comprehensive financial analysis of operations and strategic planning.

Mollie Werwas
Mollie is a founding Member of Airdo Werwas, LLC. Ms. Werwas practices with the firm’s insurance coverage and health care litigation groups. She has represented clients at the state and national level in matters involving complex insurance coverage issues, including personal injury claims, long-tail liability matters, uninsured motorist claims, business interruption claims, and catastrophic property losses. She has counseled clients in drafting manuscript coverage agreements and amendments, tendering matters for defense and indemnification by third parties, and preparing reservation of rights and denial of coverage letters. Ms. Werwas has also worked with clients in both prosecuting and defending declaratory judgment actions relating to insurance coverage. In addition to her work in the insurance
coverage area, Ms. Werwas also represents not-for-profit nursing homes in the defense of litigated claims. She has experience handling a wide range of subrogation claims, including product defect claims, construction actions, employee dishonesty, and traditional tort claims. In this context, she has worked with experts in many disciplines, from the initial stages of investigating causes and origins of losses and injuries, preserving evidence and participating in all phases of litigation. Ms. Werwas has authored articles for the Illinois Association of Defense Trial Counsel on issues relating to the duty to defend and coverage in construction defect claims. She has also presented webinars for her clients relating to cyber liability insurance and preparedness, social media issues, and insurance record retention policies. She received both her undergraduate degree, summa cum laude, and her law degree, summa cum laude, from Southern Illinois University.

Laura Wicklander West

Laura is a Director of Client Service and Sales and focuses on developing and maintaining successful client relationships for Great Lakes Advisors. Laura specializes in investment solutions for religious institutions. Before joining the firm in 2012, Laura worked at Mercy Home for Boys and Girls, completing a full-time annual volunteer program and subsequently managing corporate and foundation relationships. After Mercy Home, Laura was part of the launch team for a new division with Accretive Health, working to improve quality outcomes and reduce care costs for a nonprofit health system in Minneapolis. Additionally, she worked in the social work department at the University of Chicago Hospital while completing her graduate degrees. Laura is a founding member of the Associate Board of Mercy Home for Boys and Girls and is currently a member of Mercy Home’s Leader Council.
She is also on the Big Shoulders Fund Chairmen’s Advisory Council, a board member of the Wicklander Family Foundation, a parishioner of St. Francis Xavier in La Grange, and an active volunteer at St. Francis Xavier School. Education and Professional Credentials; Vanderbilt University, BA & University of Chicago, MBA, MSW.

**Courtney Wicks**

Courtney has served as the Executive Director of IASJ since October 2021. Wicks is an experienced professional with proven management skills and a strong record of accomplishment in the development and implementation of Diversity, Equity, and Inclusion (DEI) strategies, policies, and objectives. She assumed her duties on October 18, 2021. Courtney Wicks has 15 years of experience in the development and implementation of strategies, policies, and practices that advance diversity, equity, and inclusion (“DE&I”). She has a track record of driving transformational change and creates meaningful impact that helps attract, retain, and engage a diverse community while building DE&I leadership capabilities across the organization. Courtney earned a B.S. in Business Management at Saint Peter’s University and is currently earning an M.S. in Organizational Leadership and Development at Columbia University (2022).

**Samantha Wild**

Samantha’s focus within Plante Moran is on property use and transitions. She assists with real estate market research, highest and best use analysis, financial feasibility analysis, due diligence, and similar analyses for religious institutes and a variety of other clients. As part of the real estate investment team, Samantha assists with developing strategies for ground-up and redevelopment projects. She has significant experience working with religious communities in need of real estate
repositioning or disposition strategies. She has conducted research on land trusts, conservancies, foundations, and organizations that use property to promote environmental sustainability.

For more than 12 years Jeff has provided assurance and advisory services to a variety of organizations, with a primary focus on serving not-for-profit organizations, including large organizations that are internationally active. He oversees the audit planning and risk-assessment process to ensure all not-for-profit-specific and other compliance concerns are addressed. As an on-the-ground leader during audits, he serves as a go-to person for any questions or concerns. He is also the Industry Technical Specialist (ITS) for Plante Moran’s not-for-profit practice and a member of its professional standards team. In his ITS role, he creates and delivers content for internal training, performs quality control reviews of financial statements, and collaborates with Plante Moran’s other technical leaders to ensure the proper and practical implementation of new accounting standards. He has presented numerous times on not-for-profit industry topics, such as Plante Moran external webinars, at the Resource Center for Religious Institutes’ National Conference, and the AICPA Not-for-Profit Industry Conference, on subjects such as advanced accounting and financial reporting topics and common financial statement errors.
Conference Site

The 2022 RCRI National Conference, October 4th - 7th, 2022.
Lodging and events will be held at:

Hyatt Regency Dallas
300 Reunion Boulevard
Dallas, Texas 72507
Phone: (214) 651-1234

Your hotel room is NOT included in the conference registration fee.

Workshop and Meal Selections

Review the Conference Registration Booklet and select the workshops and hospitality events you plan to attend. Your selection assists RCRI in providing adequate meeting room space and meal guarantees.

Food functions listed on the registration form are included in the registration fee. Continental breakfasts are available Wednesday and Thursday, and a hot breakfast on Friday; buffet lunch is available on Wednesday afternoon.

Please carefully select which meals you will attend, as RCRI incurs an expense if you do not attend.

Conference Fee and Registration Dates

Please register using our on-line form available at https://www.trcri.org/page/NC2022 under “Services”, “National Conferences”, “National Conference 2022.” Registration is available through September 23rd, 2022. You will save up to $100 by registering early!
Before 7/29 | From 7/30 to 8/26 | After 8/27
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RCRI members rooming at the Hyatt Regency Dallas* | $400 | $450 | $500
RCRI members not staying at the Hyatt Regency Dallas* | $500 | $550 | $600
Those who are not RCRI members | $600 | $650 | $700

RCRI members include all members and employees of a religious institute with paid 2022 membership in RCRI, not only the named representative.

* RCRI must meet a minimum number of room reservations to receive complimentary meeting space. Thank you for your assistance in supporting conference space needs by rooming at the Hyatt Regency Dallas.

* Discounts on the conference fee are available. If your community is unable to pay, we encourage you to contact us for a discounted rate.

**Cancellation Policy**

- For written cancellations before September 2nd, RCRI will refund the conference fee, less a $50 processing fee.
- Fifty percent (50%) of the conference fee will be refunded for cancellations made between September 3rd and September 23rd.
- On or after September 24th, no refund will be made.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by the registered attendee, naming his/her substitute.

**Policy for Guests**

There is a $175 charge for RCRI Conference guests. Guests are welcome at the opening session, in the Exhibit Hall and at all food functions if properly identified with a name badge. Guests are not permitted to attend workshops.
HOTEL RESERVATIONS

Special Room Rates for RCRI Conference Attendees

The hotel rate of $162 for single or double occupancy rooms is available over the conference dates and—based on hotel availability—the rate will be offered for the three days prior to and three days following the conference. To ensure the special rate, hotel reservations must be made by September 7th, 2022 by using the link below. Reservations made directly to the hotel will receive the RCRI discount rate.

Reservations

All reservations must be made through the Nix Conference and Meeting Management online reservation system. Credit card information is required when making your reservation. The first night’s deposit is required at time of booking. If sharing a room, please register each individual by name on the registration form to be assured of the discounted RCRI Conference registration fee. Special needs should clearly be identified on the hotel reservation form. When you click the ‘Submit’ button, your hotel reservation will be transmitted to Nix Conference and Meeting Management on a secure website which protects your identity and information. For other inquiries, contact Nix at registrar@nixassoc.com or phone toll free 800-266-0866, or 314-645-1455. All guests with confirmed reservations will be accommodated. Please use this link to make your hotel reservation: https://www.nixmeetings.com/rcri2022/2084506?i=qgTYZX7fugUfjGxSPDWPbRQ8gfsnAy9Yh

Hotel Amenities

The Hyatt Regency Dallas has free Wi-Fi available in guestrooms and social spaces such as lobbies and restaurants, excluding meeting spaces. The hotel has a full-service business center and provides several on-site dining options.

Parking

Self-parking is available at the hotel for $22 per day, with in-and-out privilege. Valet parking $36 a day. These rates are subject to change.
**Airport**

The hotel is located 17 minutes from Dallas/Fort Worth International Airport (DFW) and 10 minutes from Dallas Love Field (DAL).

**Mass/Prayer Services**

Mass and prayer services will be provided on site; please refer to the program for schedule and location.

**Nearest Catholic Church**

**St. Jude Chapel**  
1521 Main Street, Dallas Texas, 75201  
The church is 1.2 miles from the Hyatt Regency Dallas.

Mass’ are offered at St. Jude Chapel:

- **Monday to Friday:** 11:40 AM and 12:10 PM  
- **Saturday:** 4:00 PM  
- **Sunday:** 9:30 AM and 11:30 AM

For more information, please visit their website:  
[https://www.stjudechapel.org/](https://www.stjudechapel.org/)

**Continuing Professional Education Units**

For those who require CPE credits, following the conference please submit your request for RCRI verification of attendance. We will send you a letter of verification that will include a list of workshops for which you registered and attended. If you have questions; contact **Sabrina Hidalgo**, shidalgo@trcri.org or 301-589-8143.

**Wednesday Lunch**

A buffet lunch will be provided on Wednesday for all attendees. Tables will be provided for CORTs who wish to gather during Wednesday’s lunch break. Please send a request to **Sabrina Hidalgo**, shidalgo@trcri.org.
**Recordings and Workshop Handouts (NEW)**

Keynote and all workshops will be video recorded. Details about availability of the recordings will be forthcoming. Paper handouts will not be provided on site. Handouts will be loaded to our Guidebook app prior to the workshops. More information about the Guidebook app will be sent to registered participants closer to the conference date.

**EXHIBITOR INFORMATION**

**Event Sponsorship**

RCRI is grateful to any organization willing to sponsor a speaker, a meal or a break, as it helps us offer a more affordable conference to religious institute members and employees. Sponsorship information will be posted on our website along with other exhibitor information. Please contact Sabrina Hidalgo, shidalgo@trcri.org or 301-589-8143, for more information.

**Exhibit Information**

See exhibitor materials on our Conference website: [https://www.trcri.org/page/NC2022](https://www.trcri.org/page/NC2022) for booth fees, registration forms, sponsorship opportunities and cancellation policy. You can also contact Nix Conference and Meeting Management at 314-645-1455 and mention the RCRI Conference for more information. To assure inclusion of information in conference materials, please register by September 7th, 2022.
Resource Center for Religious Institutes

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