Communications in a Synodal Church

Opportunities & Challenges

September 26-29th, 2023
Hyatt Regency | St. Louis, Missouri
Welcome to the 2023 Annual RCRI Conference!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, welcome to the 2023 annual conference in St. Louis, Missouri. We look forward to an enriching, enthusiastic, and enjoyable conference gathering, realizing in new ways how our lives are interwoven with so many other people, accompanying us and helping to shape our decisions and our lives as we continue to walk together in hope.

The 2023 Conference Planning Committee has developed an extensive program of 41 workshops addressing topics many of you have suggested as well as new topics that will support you in addressing the financial and legal issues facing your institutes, especially during these times of transition. As well as three workshops on Eldercare sponsored by NRRO.

Once again, we will video-record all workshops during the conference and make them available to RCRI members. Prior to our gathering in St. Louis, we will let you know of any protocols that may be in existence to ensure the protection of all attendees.

The 2023 conference theme, Communications in a Synodal Church: Opportunities and Challenges, will focus on the 60th anniversary of Inter Mirifica, the Vatican II Decree on the Media of Social Communication and Pope Francis’s call for a Synodal Church. While 60 years have passed since the promulgation of the Vatican II Decree, many of the themes are relevant to media and social communications today. In addition, the Intercontinental stage of the synodal process, its message, and experience is an occasion to delve more deeply into its implications for the U.S. Church. – What is this stage of the Synod saying to the Church in the U.S.? What can we learn from this experience?

In the 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]. The synodal process embodies a reception of Vatican II’s understanding of the Church as a People of God walking together as Pastors and other people bound together with equal dignity in Christ by baptism. A synodal church reveals itself through all persons accompanying one another under the guidance of the Holy Spirit even in diverse points of view.

Among the highlights of the 2023 conference will be the keynote address by Ms. Kim Daniels, Director of the Georgetown Initiative on Catholic Social Thought and Public Life, on Tuesday evening. 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 Legal Update for Religious Institutes in 2023.

We welcome you to the 2023 RCRI conference and look forward to sharing this time with you.

Sincerely,

Sr. Sharon Euart, RSM
Executive Director
CONFERENCE SCHEDULE

TUESDAY, SEPTEMBER 26

7:30 AM  EUCHARIST
8:00 AM  CONTINENTAL BREAKFAST

PRE-CONFERENCE WORKSHOPS

9:00 AM – 12:00 PM TRENDS FOR BEGINNERS – BR. LAWRENCE LUNDIN, SJ & MATT WADE
REGISTRATION FEE: $150*

1:30 – 4:30 PM LEGAL UPDATES FOR RELIGIOUS INSTITUTES IN 2023 – MICHAEL AIRDO & MOLLIE WERWAS
REGISTRATION FEE: $150*

*Your registration fee includes lunch for all pre-conference attendees.

3:00 PM  ATTENDEE CHECK-IN / EXHIBITS OPEN
5:30 PM  WELCOME AND PRAYER
KEYNOTE ADDRESS – Communications in a Synodal Church: Opportunities and Challenges – Kim Daniels

6:45 PM  RECEPTION

WEDNESDAY, SEPTEMBER 27

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

9:00 – 10:30 AM SESSION 1

1. Copyright, Copywrong and Copy Justice – Sr. Amy Hereford, CSJ
2. Over the Horizon: Alternative Legal Structures for Continuing Ministry when Completion is in View – Mark MacDougall
3. Incorporating a culture of philanthropy in your religious community – Zela Astarjian, Katie Thiemann, Sr. Irene O’Neill, CSJ & Sr. Barbara Thomas, ASCJ

10:30 AM BREAK

11:00 AM – 12:30 PM SESSION 2


8. Discerning hearts need accurate TRENDS – Bethany Jaeger, Sr. Hertha Longo, CSA & Kate Ward

9. Partnerships with Nonprofit Developers – Adam Kopp & Dee Walsh

10. Giving in the Here and the Hereafter – Mary Foley & Sr. Dawn Tomazewski, SP

12:30 – 2:00 PM LUNCH BUFFET

2:00 – 3:30 PM SESSION 3

11. The Road Ahead: Continuing the Catholic Identity of Ministries of Religious Institutes – Sr. Deborah Cerullo, SSND & Stephen Patterson


13. Supporting Mental Health Conditions While Living in Community – Sr. Julie Bruss, SND

14. Transitioning Ownership of a Long-Term Care Facility: How to Navigate the Process – Andrea Chleboun, Sr. Pat Cormack, SCSC & Ed McGrath

15. Develop a Strategic Fleet Plan – Trish Coffey, Brad Forbush & Joe Scott

3:30 PM BREAK

4:00 – 5:30 PM SESSION 4

16. Emerging MPJPs for Education in the US – Sr. Amy Hereford, CSJ


19. What Your Donors Won’t Tell You About Your Fundraising. . . But We Will! – Chad McEachern & Leslie Mollsen


FREE EVENING
THURSDAY, SEPTEMBER 28

7:30 AM  BREAKFAST/EXHIBIT HALL

8:30 AM  PRAYER

9:00 – 10:30 AM  SESSION 5
21. Parsing Liabilities Between Dioceses and Institutes – Mark Chopko
22. Climate Change, Diversity, Equity and Inclusion: Risks and Opportunities in Investments – Sr. Suzanne Brennan, CSC, Sr. Helen Kearney, CSJ, James Malone, Aimee O’Connor, Jon Quigley, Ibrahim Rashid & Laura Wicklander West
23. Are You Paying Your People Fairly? How Do You Know? – Mary Kessler
25. Religious Institutes and Senior Care: How do We Care For our Members? – Lori Ashmore-Rupel, Fr. Charles Bouchard, OP & Susan McDonough

10:30 AM  BREAK

11:00 AM – 12:30 PM  SESSION 6
26. New Conversation: Civil and Canonical Update on Providing Safe Environments for Adults in 2023 – Michael A. Airdo, Esq., Sr. Sharon Euart, RSM, JCD, and Christopher Fusco, JCL, JD
27. Advanced Topics in Accounting – Adam Counts, Mariam Dresden & Kellie Ray
28. The COO/Executive Director Position in Religious Congregations – Toni Ponder
30. Pioneers and Prophets: Moving After 146 Years – Sr. Barbara Biver, ASC, Sr. Mary Catherine Clark, ASC, Sr. Mary Ellen Hubbard, ASC, Sr. Barbara Hudock, ASC & Sr. Joan Stoverink, ASC

12:30 – 2:00 PM  LUNCH ON YOUR OWN

2:00 – 3:30 PM  SESSION 7
Thursday, September 28

32. Fraud Prevention and Detection: Leading Practices to Protect your Not for Profit – Fr. Enrico Hernandez, IVDei, Laurie Horvath, Ellen Labita & Kevin O’Connell & Krista Pankop

33. Employers on the Upswing? – Jennifer Gniady

34. Freedom from the fear of asking - Philanthropy as Evangelization – John Flanagan

35. The Ten Spiritual Developmental Tasks of the Illumination Years (66+) – Dr. Richard Johnson

3:30 PM BREAK

3:45 – 5:15 PM SESSION 8

36. Like a Tree, Every Leave is Unique: Leaves of Absence Today – Michael Airdo & Mollie Werwas

37. Four Essential B’s: How Beliefs Affect Our Bodies, Brains and Bonds – Anne Kertz Kernion

38. Charism and Mission as the Foundations of Socially Responsible Investing – Christopher Cox, Fr. Séaums Finn, OMI, Sr. Susan Mika, OSB & Duane Roberts


5:30 PM CONFERENCE EUCHARIST

FREE EVENING

FRIDAY, SEPTEMBER 29

7:00 AM EUCHARIST

7:30 – 9:00 AM HOT BUFFET BREAKFAST

9:00 – 11:00 AM SESSION 9

41. Government Programs Update: 2023 – 2024 – Constance Neeson
DETAILED DESCRIPTIONS

TUESDAY, SEPTEMBER 26

7:30 AM  EUCHARIST

8:00 AM  CONTINENTAL BREAKFAST

PRE-CONFERENCE WORKSHOPS

9:00 AM – 12:00 PM  TRENDS FOR BEGINNERS – BR. LAWRENCE LUNDIN, SJ & MATT WADE
This workshop is an introduction for those who are new to TRENDS, or for those who have not used TRENDS in a while and want a refresher. The emphasis will be on how to prepare and input census and financial data into the matrix and the program itself. The “My Trends” interface and Scenario Analysis Tool will also be demonstrated. Time will be spent at the end of the workshop on how to interpret, analyze and prepare the data in a way that is helpful to leadership. As a pre-requisite, those who attend should have purchased TRENDS 2021.

1:30 – 4:30 PM  LEGAL UPDATES FOR RELIGIOUS INSTITUTES IN 2023 – 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.

*Your registration fee includes lunch for all pre-conference attendees.

3:00 PM  ATTENDEE CHECK-IN / EXHIBITS OPEN

5:30 PM  WELCOME AND PRAYER

Keynote Address – Communications in a Synodal Church: Opportunities and Challenges – Kim Daniels
Pope Francis has described the ongoing Synod as a call to “unity, communion, and the fraternity born of the realization that all of us are embraced by the one love of God.” Effective communication is essential to authentic encounter, listening, and discernment, and so is at the heart of this effort.

Communicating about this global listening process aimed at renewing our ability to live out our Gospel mission presents numerous challenges. To date, American attitudes and responses to the Synod reflect some of the strengths and divisions within the Church in the United States.
We are a large, diverse, active, and challenged community of faith. The divisions in our society and Church have shaped responses to the Synod, resulting in some enthusiasm, some skepticism, and a good deal of uncertainty.

At the same time, the Synod also offers remarkable opportunities to witness to the “field hospital” Church we’re called to be. Advancing the Church’s Gospel mission is central to the Synod; as Dr. Anna Rowlands noted when introducing the Synod’s Document for the Continental Stage, we are working for “an outward-looking Church which is healthy from the inside.” Pope Francis is a model here; as he has said, the root of all credible, effective communication is not marketing and strategizing, but a “clear and decisive focus” on our Gospel mission.

Kim Daniels is the Director of The Initiative on Catholic Social Thought and Public Life at Georgetown University. She was appointed by Pope Francis as a Member of the Vatican Dicastery for Communication and a member of the Synod 2021-2024 Communications Commission. She is a consultor to the U.S. Conference of Catholic Bishops’ Committee for Religious Liberty and has advised the U.S.C.C.B. and other Catholic institutions on a broad range of issues where Church teachings intersect with public life. Kim is a graduate of Princeton University and the University of Chicago Law School.

6:45 PM

RECEPTION

**WEDNESDAY, SEPTEMBER 27**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM</td>
<td>EUCHARIST</td>
</tr>
<tr>
<td>7:30 AM</td>
<td>BREAKFAST/EXHIBIT HALL</td>
</tr>
<tr>
<td>8:30 AM</td>
<td>PRAYER</td>
</tr>
<tr>
<td>9:00 – 10:30 AM</td>
<td>SESSION 1</td>
</tr>
</tbody>
</table>

1. **Copyright, Copywrong and Copy Justice** – Sr. Amy Hereford, CSJ

Since 2020, we have increasingly led meetings over virtual platforms like Zoom, using music, art, and text. The virtual platforms will hold the user accountable for gaining the necessary permissions to use content from third parties, and will not be responsible should a copyright infringement claim occur. This workshop is designed to help you identify content that you can use for your events and meetings, and endeavors to provide straightforward ways to avoid copyright infringements.

2. **Over the Horizon: Alternative Legal Structures for Continuing Ministry when Completion is in View** – Mark MacDougall

When actuarial studies and declining numbers signal that a religious institute will complete its mission in a defined period of time, that does not mean that the institute’s ministry must come to an end. Using well-defined tools of civil law, religious institutes may construct alternative avenues to continue public ministry long after the number of members in religious life has reached an unsustainable...
level. Independently managed donor trusts and similar structures based in civil and corporate law can be effectively used to preserve and continue a religious institute’s service to the Church and to the communities that have historically benefited from its charitable works. The aim of this workshop is to identify and discuss legal and analytical tools that permit religious institutes to protect and direct long-term assets in a post-completion course of ministry. Examples of topics to be discussed include (a) identification of ministries that may be continued and even expanded post-completion, (b) placement of real property into platforms that will permit continued use in a manner consistent with the institute’s charism, (c) configuration of long-term funding programs to support defined ministerial activities, (d) selection and engagement of institutional fiduciaries, (e) measures to insure that the religious institute’s long-term intent is tamper-proof, (f) compliance with state law relating to charitable assets, and (g) opportunities for creativity in the process. This workshop will be interactive and focused on a series of hypothetical case studies to be distributed to participants with the conference materials in advance of the workshop.

3. **Incorporating a culture of philanthropy in your religious community** – Zela Astarjian, Katie Thiemann, Sr. Irene O’Neill, CSJ & Sr. Barbara Thomas, ASCJ

More and more, Catholic institutions are making advancement a priority. The reason: Without a strong advancement program, some organizations may struggle or fail in the decades ahead due to shifting demographics and donation practices among Catholics nationally. This will be an educational workshop and will cover essentials such as enhancing financial management practices, creating an advancement function, making fundraising more strategic, building a strong endowment and implementing best practices for board governance.

4. **Dominican Sisters of San Rafael’s Journey to Incorporate Solar in their Future: Using the Laudato Si’ Action Platform to Help Us Walk the “Path to Renewal” Together** – Julie Heiberger, Henry Hundt & Sr. Carla Kovack, OP

Our presentation shares the journey of the Dominican Sisters of San Rafael as they found new ways of living on their small campus. Learn how their decision to renovate and expand an existing convent led to making their entire property more sustainable. We will discuss evaluating the energy needs of their building and how that was offset with various solar energy systems. We’ll explore energy storage systems, solar carports, options for retrofitting existing roofs, and more.

5. **Patrimony: It Is Not Just Land and Money: Creating a Plan for Your Archives** – Sr. Susan Durkin, OSU & Sr. Ginger Downey, OLVM

Regardless of where your congregation is on its journey, creating a long-term Archival plan for sustainability and preservation of your legacy is vital. This workshop will answer questions and provide valuable and practical information to assist you in beginning conversations around planning for your archive. We will include tips on how to identify helpful individuals within your organization and outside resources to support your congregation in creating a viable plan and avoiding a crisis.

10:30 AM  BREAK
SESSION 2


This workshop will explore the permanent residency process (the “green card” process) for international religious workers living and working in the U.S. Panelists will discuss the eligibility requirements for the permanent resident process, when to file and troubleshooting issues, and best practices to maintain lawful permanent resident status in the U.S. The R-1 religious worker visa will also be discussed as part of this process.


The public debate concerning whether investors should incorporate ESG as a core investment principle has raised a lot of critical questions about impact and effectiveness including whether ESG helps to drive the kind of impact that improves environmental and social outcomes. This session will explore: How do we make sure that our investment decisions, however well intentioned, don’t inflict further harm; and How do we better track and measure the social and environmental impacts of our investments? Join this discussion about the different positive impacts investors can have, how concrete change can be measured, and questions you can ask of your managers to ensure your portfolio is in alignment with your mission and values.

8. Discerning hearts need accurate TRENDS – Bethany Jaeger, Sr. Hertha Longo, CSA & Kate Ward

Beyond the nuts and bolts of entering TRENDS membership and financial data, this workshop is a continuation of last year’s workshop to provide practical tips for using TRENDS to inform long-term planning and analysis. Presenters will offer tips for evaluating assumptions and data sources, adjusting for unusual events, running alternative scenarios, and applying the learnings to planning processes. More alternative scenarios will be demonstrated.

9. Partnerships with Nonprofit Developers – Adam Kopp & Dee Walsh

The Catholic Church and Women Religious own significant amounts of property, some of which is not actively being used. This creates opportunity for the land to be re-purposed while continuing to meet the Church’s mission. Mercy Housing has worked on multiple partnerships with religious groups to build affordable housing and will present case studies on these relationships and how the projects were developed.

10. Giving in the Here and the Hereafter – Mary Foley & Sr. Dawn Tomazewski, SP

As we head into the last quarter of the calendar year, it is essential that best practices for end-of-year giving are firmly in place. At the same time, however, we must not put off refreshing or instituting planned giving efforts, particularly those directed toward bequest gifts. This session will provide specific, actionable strategies to; renew current donors, reclaim lapsed donors, upgrade consistent donors, and inspire and recognize bequest donor prospects. Topics to enhance 2023 giving will include segmentation, personalization, outreach, communication,
donor trends and expectations, solicitation options, challenge gifts and more. On the planned giving front, we will address audiences, history, options, marketing, primacy, vehicles, venues, bequest intention promotion and management, bequest/endowment link, policies and protocols. This topic is timely not only because of the focus on year-end giving, but also because many of the RCRI participants need to better promote the opportunities for and advantages of bequest giving to their constituents. Furthermore, it will educate participants on free resources they can access to support their fundraising endeavors.

12:30 – 2:00 PM
LUNCH BUFFET

2:00 – 3:30 PM
SESSION 3

11. The Road Ahead: Continuing the Catholic Identity of Ministries of Religious Institutes – Sr. Deborah Cerullo, SSND & Stephen Patterson

Religious institutes sponsor a wide variety of operations, including schools, healthcare facilities, and other entities. However, as religious institutes’ numbers begin to decline, there is an increasing need for tools that will preserve the Catholic identity of their ministries. As religious institutes approach the time where it is no longer feasible for them to serve in a sponsorship role, it is important for them to plan ahead to ensure the continuation of the ministries’ good work. This workshop will discuss various methods that can be used to preserve the Catholic identity of ministries of religious institutes, specifically in the context of the sale or redevelopment of ecclesiastical real property. This presentation will provide an overview of the components of sales and redevelopment projects and the potential hurdles to success, as well as a discussion of how to incorporate continued Catholic identity as a central component of such transactions.


Religious institutions have rich traditions of aligning investment decisions with their values. In 2023, we have an established community of pioneering Catholic congregations who are answering the call to boldly contribute towards solutions to climate, economic, and racial injustice crises through their mission-driven impact investing portfolios. The session will offer a window into the journeys of four practitioners, how Catholic Social Teaching (CST) grounds their investment work, and the support they receive from peer communities.

13. Supporting Mental Health Conditions While Living in Community – Sr. Julie Bruss, SND

When a member is dealing with a mental health condition, the impact is on the community as well as the individual. How do we create a healthy community when interpersonal dynamics are challenging? During this workshop, we will share approaches and skills for self-care and interpersonal effectiveness in meeting individual and community needs. We will also offer basic information about the most common mental health conditions and resources to support the individual and the community.
14. Transitioning Ownership of a Long-Term Care Facility: How to Navigate the Process – Andrea Chleboun, Sr. Pat Cormack, SCSC & Ed McGrath

Ever-changing healthcare dynamics and the long-lasting impact of COVID-19, coupled with the aging membership of many Congregations, is leading many organizations, especially those operating stand-alone facilities, to ponder if and when a change of sponsorship for healthcare operations may be appropriate and, if so, how to navigate this process. Highlighting the process and experience of the Holy Cross Sisters, this presentation will provide audience members with a step-by-step approach to working through an RFP process for a transition of ownership, including effective decision-making processes, dos and don’ts of an RFP process, key criteria for consideration in evaluating potential parties to whom to transfer ownership and lessons learned through the Sisters’ experience.

15. Develop a Strategic Fleet Plan – Trish Coffey, Brad Forbush & Joe Scott

Providing transportation for a Congregation’s members is one of a community’s highest operational costs. To offset these rising costs, many communities are implementing best practices to reduce the time, capital, and human resources needed to manage their vehicles. In this session, participants will explore today’s current challenges in managing a vehicle fleet, and engage in dialogue with a panel of speakers including a CFO of a Congregation, and experts from the fleet management industry who will present and discuss the solutions that are proven to lower the cost of a vehicle fleet and improve driver safety. Participants will receive supporting handouts outlining practical suggestions that can be implemented immediately.

3:30 PM BREAK

4:00 – 5:30 PM SESSION 4

16. Emerging MPJPs for Education in the US – Sr. Amy Hereford, CSJ

The workshop will discuss the transfer of sponsorship of educational ministries to a Ministerial Public Juridic Person. This workshop will examine emerging Educational MPJPs in the US, discussing civil and canonical principles involved, process and timeline for developing and implementing an MPJP with case study. Important elements in the process: preserving Catholic identity, relationship to Church authorities, responsibility and accountability, role and responsibility of the MPJP in continuation of Jesus’ mission, mutuality and service.


Climate change interacts with and worsens existing inequalities in society that are often shaped by racism. Black people, Indigenous people, and people of color (BIPOC) are disproportionately experiencing the impacts of climate change. We will discuss how its investment strategy activates the Gospel mission of economic justice and care of the earth. We will also explore how they approach racial justice and climate justice with their own lending products.
18. **Our Employees, Our Mission, Our Legacy** – Dayna Larson-Hurst, Sr. Michael Ann Orlik, SS.C.M. & Sr. Barbara Sable, SS.C.M.

Many religious congregations find themselves needing lay staff to carry on the work that they have done in the past. How do we maintain our mission and ministry that has been so deeply formed in us when now we must rely on others? During this workshop we will share our ongoing process of creating a formation path for staff to encourage them to embrace their work as a ministry rather than just a job.

19. **What Your Donors Won’t Tell You About Your Fundraising. . . But We Will!** – Chad McEachern & Leslie Mollsen

Your donors love your organization, but they might not love that special event you have been running since the beginning of time. In the post-Covid era we have learned new insights about major donor behavior and their evolving preferences for support. If you need to enhance your development efforts and build a culture of philanthropy, please join us in this lively, interactive session guided by two fundraising veterans. Together, we will share our experiences, seek the wisdom of our audience, and come to resolution on some common challenges that religious institutes face in development. Attendees will take home strategies they can immediately implement to begin taking their fundraising to the next level.

20. **Can You Afford Not to Confront Unsafe Drivers?** – Jeff Harrison & Dianne Prestridge

Giving up the privilege of driving can be just as hard as asking someone to hand over their keys. This conversation can be even harder if the individual lives by them self and has not been in a recent, serious accident. Monitoring and managing a religious community’s drivers can be unpleasant, however it is an essential task all communities need to take part in to help protect human life. This workshop will review a variety of steps religious communities can utilize to manage and monitor their drivers before the stressful conversation takes place of asking a driver to give up their keys. The workshop will also offer a variety of steps on how to approach different scenarios in order to help reduce the level of stress when the time does come to remove driving privileges. Resources will be reviewed and provided to attendees.

**FREE EVENING**
THURSDAY, SEPTEMBER 28

7:30 AM  BREAKFAST/EXHIBIT HALL
8:30 AM  PRAYER
9:00 – 10:30 AM  SESSION 5

21. Parsing Liabilities Between Dioceses and Institutes – Mark Chopko

Dioceses, parishes and religious institutes cooperate in public ministry. Sponsored ministries are conducted supportively in diocesan territories. But when it comes to liability – confusion and even disagreements occur. Litigants sue everyone and everything conceivably related to the injury “just because they are all Catholic.” That tactic is the norm. What should not be the norm is bickering among defendants about which entity is “the proper defendant.” This session will offer some healthy direction and line drawing to assure that the work that actually controlled the person who or activity in which an accident or breach occurred will be held accountable, and no one else.

22. Climate Change, Diversity, Equity and Inclusion: Risks and Opportunities in Investments – Sr. Suzanne Brennan, CSC, James Malone, Aimee O’Connor, Jon Quigley, Ibrahim Rashid & Laura Wicklander West

This discussion will focus on how considerations of climate change, diversity, equity and inclusion can be incorporated into investment portfolios. This is a timely topic, as the conversation is shifting from “climate change” to “climate crisis,” and religious investors increasingly want to incorporate climate considerations. Additionally, DE&I has shifted over time and we will discuss how investors are incorporating this into investment portfolios.

23. Are You Paying Your People Fairly? How Do You Know? – Mary Kessler

Typically, the largest part of your budget is spent on salaries and benefits. Hiring well-qualified employees is a competitive process and turnover is expensive. Fair pay practices are needed, but often elusive. Having a compensation system in place based on relevant, up-to-date benchmarks helps ensure you are paying a fair wage. This session will identify a solid process for creating and maintaining a compensation system, communicating both gospel values and the mission and values of your organization.


The Vatican repudiated the Doctrine of Discovery, yet its destructive legacy remains: 98% of land in the U.S. is owned by white people and 1500 acres are developed every day. It’s time to re-imagine property planning as a catalyst for both ecological and racial healing. Come explore the connection between climate, racism, and the property system; learn the elements of a land justice property plan; hear inspiring case studies; and join an enlivening conversation about creating legacies of healing on sacred lands.
25. Religious Institutes and Senior Care: How do We Care For our Members? – Lori Ashmore-Rupel, Fr. Charles Bouchard, OP & Susan McDonough

Inadequate funding, a shift away from skilled nursing and personnel shortage create challenges for elder care. This workshop will focus on trends in Catholic senior living with an emphasis on how we provide care to our own members. We will challenge participants to explore what role the Church and our communities should play in addressing the growing social need for quality senior care and identify ways to assess ministries, explore options, and provide ideas for successful partnerships.

10:30 AM

11:00 AM – 12:30 PM

SESSION 6

26. New Conversation: Civil and Canonical Update on Providing Safe Environments for Adults in 2023 – Michael A. Airdo, Esq., Sr. Sharon E uart, RSM, JCD, and Christopher Fusco, JCL, JD

The obligations of religious institutes related to the provision of safe environments for vulnerable adults continue to grow and become more complex. Today, safeguarding ministry is facing new challenges in an ever-evolving social and legal landscape. This presentation will discuss those emerging challenges, as well as available tools and best practices for religious institutes to fulfill their obligations to provide safe environments for vulnerable adults. Topics discussed will include the increased focus on the protection of vulnerable adults in recent years, the development of clear codes of conduct, and the role of the leader in implementing effective safeguarding protocols.

27. Advanced Topics in Accounting – Adam Counts, Mariam Dresden & Kellie Ray

Come join us to discuss accounting and audit items with auditors who specialize in religious congregations. Topics include, but are not limited to, best practices for internal controls for different-sized accounting departments; clarifying guidance on complex accounting issues; key financial statement disclosures for consideration; common topics you should be discussing with your auditor throughout your fiscal year; and more!

28. The COO/Executive Director Position in Religious Congregations – Toni Ponder

This session will address the “ins and outs” of the relatively new role for provinces of the Chief Operating Officer or Executive Director. Having lay staff serve in the functions of the finance office, eldercare, health and wellness, communications, and the like have become rather common. The realities facing leadership councils today have many considering adding a new position—Chief Operating Officer or Executive Director. This session will explore how this position can serve leadership, the province, and your lay staff. It will address how this position allows leadership to focus on mission and ministries and to have a professional, business lay partner to focus on strategic business and operating initiatives under leadership’s guidance.

In 2020, Pope Francis committed the Vatican to become net zero by 2050. What does net zero mean? What are the steps needed to get your facility to net zero? Who is currently pursuing this in the U.S. Catholic community? This workshop will answer these questions and encourage you to consider this important path, a path that rises to the challenges of Laudato Si’ and helps secure a planetary future for the next generation.

30. Pioneers and Prophets: Moving After 146 Years – Sr. Barbara Biver, ASC, Sr. Mary Catherine Clark, ASC, Sr. Mary Ellen Hubbard, ASC, Sr. Barbara Hudock, ASC & Sr. Joan Stoverink, ASC

Making the decision to sell, close, or move from the place your members call “home” can often be difficult. Supporting the transition can best be assisted with a well-thought-out plan. After 146 years, the Adorers of the Blood of Christ closed their Motherhouse and relocated their sisters. During this workshop, they will share how they continued their history of being “pioneers and prophets” to create a new way of life in their new home.

12:30 – 2:00 PM  
LUNCH ON YOUR OWN

2:00 – 3:30 PM  
SESSION 7


As more religious institutes consider options for canonical governance, questions arise regarding what a Commissary is, the role and responsibilities, and the Commissary’s relationship work with the institute being served. During this workshop, six pontifical or diocesan Commissaries will engage in a conversation about the similarities as well as the differences in their experiences as Commissaries. The conversation will address, among other topics, the discernment and appointment processes, duties and canonical responsibilities according to the needs of the institute each Commissary is serving, contractual and financial arrangements, relationship with the members of the institute, and challenges and opportunities. The workshop will also provide an opportunity for questions from the attendees.

32. Fraud Prevention and Detection: Leading Practices to Protect your Not for Profit – Fr. Enrico Hernandez, IVDei, Laurie Horvath, Ellen Labita & Kevin O’Connell & Krista Pankop

Baker Tilly will share trending internal control examples and present efficient solutions to optimize your organization. Working with both presentation and group exercises, we will identify change that can address what is happening in today’s world. We will work with before-and-after examples of enhanced accounting systems that help without additional expense. We will also discuss best practices for discussing the risk of fraud with boards and other stakeholders and staying aware of emerging trends.
33. Employers on the Upswing? – Jennifer Gniady

From the Great Resignation to the Great Rebalancing, find out what employment issues mark today’s economic environment. This workshop focuses on the legal landscape and maintaining a pastoral approach to employment issues. Topics include employment negotiations, including proposed limits to noncompete provisions, managing long-term virtual and hybrid employees, new benefit trends, and compliance issues that require taking into account religious freedom concerns. Roles of board members, clients, and other stakeholders will be discussed.

34. Freedom from the fear of asking - Philanthropy as Evangelization – John Flanagan

Can you evangelize while fundraising? This presentation will challenge philanthropic stereotypes and invite individuals to see this opportunity as a mutual blessing that fosters deeper relationships and mission driven success. With content built off of Fr. Henri Nouwen’s “A Spirituality of Fundraising” and Dr. Stephen Covey’s “Seven Habits”, attendees will be given the opportunity to be free from the fear of asking and see this great work with new lenses of faith.

35. The Ten Spiritual Developmental Tasks of the Illumination Years (66+) – Dr. Richard Johnson

At each stage of life, the deepest yearnings of our souls cry out in distinct ways. It’s in the so-called “retirement years” when the fullness of one’s spiritual journey comes to its most glorious expression and depth. What came before was a prelude, a preparation for the fantastic journey of interior growth and psycho-spiritual alignment. What might be the consequences if we fail to address these necessary developmental tasks?

3:30 PM BREAK

3:45 – 5:15 PM SESSION 8

36. Like a Tree, Every Leave is Unique: Leaves of Absence Today – Michael Airdo & Mollie Werwas

As employers, religious institutes must know how to respond appropriately when an employee is away from work. When employees miss work, it strains even the strongest teams. That strain is multiplied when it goes on for an extended period or when multiple employees are out in the short-term. From managing pay and benefits to ensuring employees have the correct paperwork in order to return to work safely, it is easy to get confused. Medical, military, worker’s comp, pregnancy, and personal leaves all carry different responsibilities and require individualized analysis to remain compliant with existing laws. This presentation will assist religious institutes in understanding their obligations as employers and being better situated to care for the employee and the institute when employees need time away from work.
37. Four Essential B’s: How Beliefs Affect Our Bodies, Brains and Bonds – Anne Kertz Kernion

How do our core beliefs affect our bodies, brains and relationships? (Did you know that beliefs about aging affect our health and lifespan by as much as 7 ½ years!) We’ll explore how beliefs, words and actions affect our brains and bodies, and those around us. We’ll see the importance of ritual and prayer, and how they bond us together and nurture our individual and community’s health and well-being, decreasing our stress and boosting our joy.

38. Charism and Mission as the Foundations of Socially Responsible Investing – Christopher Cox, Fr. Séaums Finn, OMI, Sr. Susan Mika, OSB & Duane Roberts

Catholics in the Interfaith Center on Corporate Responsibility (ICCR) draw inspiration from the USCCB’s Socially Responsible Investing Guidelines and the Vatican’s Mensuram Bonam. With Gospel roots and their particular charism and mission, our members help shape corporate policies through dialogue, shareholder proposals, and proxy voting. Stretched by aging and shrinking personnel, some find it increasingly difficult to engage in this ministry. This panel will illustrate potential solutions and share experiences of how they incarnate their charism and mission in SRI.

39. Making Hard Decision...with No Easy Answers – Sr. Nancy Conway, CSJ, Sr. Ginger Downey, OLVM, Julie Heiberger & Sr. Madeleine Munday, RGS

Sell? Rent? Build new? Leadership groups for today’s religious congregations are facing some of the toughest decisions of their lives. Join us as our expert panel shares insight from their leadership experiences and having had to navigate difficult journeys. You’ll hear about their decision-making processes and how their congregations dealt with new paths forward. Our panel will cover multiple topics, share personal stories, and offer tips that your leadership team is sure to find valuable.


Attendees will gain a better understanding of how changes in weather are affecting the cost of insurance. I will provide short history of insurance industry and the current marketplace. Beyond the impact on the insurance industry, I will address the losses not covered and the human impact of large losses. Projecting the changes in weather, I will look at what to expect in the future and what can be done to address these changes. In this workshop, we will examine the historical and projected losses sustained by the insurance industry. How the insurance industry has changed and is changing to meet these challenges, getting into the structure of insurance and reinsurance. While the focus will be on the economic costs, I will also address the human element and environmental changes that are and will take place in the near future. Focusing on natural disasters, I will offer information on how we begin to prepare for the worst-case scenario, what to do and how to plan for an event.
FRIDAY, SEPTEMBER 29

7:00 AM  EUCHARIST
7:30 – 9:00 AM  HOT BUFFET BREAKFAST
9:00 – 11:00 AM  SESSION 9

41. Government Programs Update: 2023 – 2024 – Constance Neeson

This workshop will cover the latest changes in government benefit programs for 2023, with a look ahead to pending changes for 2024, including 2023 income and asset standards for various programs, Medicare D changes, and updates to Authorized Representative Forms for various programs. Benefit Programs discussed will include: Social Security, Supplemental Security Income (SSI), Medicare A, B, C & D, Medicaid (for the Aged, Blind, Disabled, and Low-income Working Adults), Qualified Medicare Beneficiary (QMB), Specified Low-income Medicare Beneficiary (SLMB), the Qualified Individuals program (QI-1), the Low Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP). We will also discuss changes in Health Care legislation which may impact benefit eligibility for members of religious orders. Information will assist the Benefit Eligibility Coordinator of each religious order in managing ongoing participation in government programs.
CONFERENCE AND REGISTRATION INFORMATION

Conference Site
The 2023 RCRI National Conference, September 26 – 29, 2023. Lodging and events will be held at:

Hyatt Regency St. Louis at the Arch
315 Chestnut Street
St. Louis, MO 63102
Phone: (314) 655-1234

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 HERE https://www.trcri.org/page/NC2023
Registration is available through September 8, 2023. You will save up to $50 by registering early!

<table>
<thead>
<tr>
<th></th>
<th>Before 7/14</th>
<th>After 7/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCRI members rooming at the Hyatt Regency St. Louis*</td>
<td>$450</td>
<td>$500</td>
</tr>
<tr>
<td>RCRI members not staying at the Hyatt Regency St. Louis*</td>
<td>$550</td>
<td>$600</td>
</tr>
<tr>
<td>Those who are not RCRI members</td>
<td>$650</td>
<td>$700</td>
</tr>
</tbody>
</table>

* 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 St. Louis at the Arch.

*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 August 18th, 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 August 19th to September 1st.
- On or after September 2nd, 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 $159 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 1, 2023, 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://reg.nixmeetings.com/rcri2023

Hotel Amenities
The Hyatt Regency St. Louis 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 $36 per day and valet parking is $48 a day with in and out access. These rates are subject to change.

Airport
St. Louis Lambert International (STL) is located 20 miles from the hotel.

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

Nearest Catholic Church
Basilica of Saint Louis, King of France
209 Walnut Street
St. Louis, MO 63102
314-231-3250

Located 0.2 miles from the hotel.

Masses are offered at the Basilica of Saint Louis:
Monday to Saturday: 7:00 AM
Monday to Friday: 12:10 PM
Saturday: 5:30 PM
Sunday: 8:00 AM, 10:30 AM, 12:00 PM and 5:00 PM

For more information, please visit their website: https://www.oldcathedralstl.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
Keynote and all workshops will be video recorded. Details about the availability of the recordings will be forthcoming. Paper handouts will not be provided on-site. Handouts will be loaded into 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/NC2023 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 8, 2023.