OCTOBER 1-4, 2024 | ROSEN CENTRE, ORLANDO, FLORIDA

RCRI NATIONAL CONFERENCE

RCRI

RESOURCE CENTER FOR RELIGIOUS INSTITUTES

15TH ANNIVERSARY

People of God

Walking Together on a Synodal Path

People of God Walking Together on a Synodal Path

Welcome to the 2024 annual RCRI conference!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, welcome to the 2024 annual conference in Orlando, Florida. Since our last conference in Florida in 2018, much has happened in our world, our country, and our institutes in which our lives are interwoven with so many other people, accompanying us and helping to shape our decisions and our communities as we walk together on a synodal path. As we celebrate the fifteenth anniversary of RCRI, we look forward to an enriching, enthusiastic, and enjoyable conference gathering.

The 2024 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. This includes four workshops on Eldercare sponsored by NRRO.

Once again, we will video-record all workshops during the conference and make them available to RCRI members.

In the Synthesis Report, *A Synodal Church in Mission,* following the 2023 session of the Synod on Synodality, Pope Francis describes synodality as "Christians walking in communion with Christ toward the Kingdom along with the whole of humanity." He says that "its orientation is towards mission, and its practice involves reciprocal listening, dialogue, community discernment, and creation of consensus as an expression that renders Christ present in the Holy Spirit, each taking decisions in accordance with their responsibilities."

Among the highlights of the 2024 conference will be the keynote address on Tuesday evening by Sister Teresa Maya, CCVI, Senior Director for Theology and Sponsorship for the Catholic Health Association and a former President of her religious institute. Prior to the opening of the conference, we will offer two pre-conference workshops: one half-day session on *TRENDS for Beginners* and a full day workshop on *Legal Update for Religious Institutes in 2024*.

We welcome you to the 2024 RCRI conference and look forward to sharing this time with you.

Sincerely yours,

Sr. Sharon Euart, RSM

Sr. Sharon Euart, RSM
Executive Director

CONFERENCE SCHEDULE

TUESDAY, OCTOBER 1

7:30 AM	**MASS**
8:00 AM	**CONTINENTAL BREAKFAST**
	PRE-CONFERENCE WORKSHOPS
9:00 AM – 12:00 PM	**TRENDS FOR BEGINNERS – MATT WADE** **REGISTRATION FEE: $125***
9:00 AM – 4:30 PM	**LEGAL UPDATES FOR RELIGIOUS INSTITUTES – MICHAEL AIRDO & MOLLIE WERWAS** **REGISTRATION FEE $175***
	**Your pre-conference registration fee includes lunch for all pre-conference attendees.*
3:00 PM	**ATTENDEE CHECK-IN / EXHIBITS OPEN**
5:30 PM	**WELCOME AND PRAYER**
	Challenged to Synodal Leadership: What is Ours to Do? – Sr. Teresa Maya, CCVI
6:45 PM	**RECEPTION**

WEDNESDAY, OCTOBER 2

7:00 AM	**EUCHARIST**
7:30 AM	**BREAKFAST/EXHIBIT HALL**
8:30 AM	**PRAYER**
9:00 – 10:30 AM	**SESSION 1**

1. **The Evolution of Community Investing and Religious Congregation Strategies** – Jeannine Jacokes, Sr. Marlin Llanes, OP, Cathie Mahon & Darin Williams
2. **Coverage and Contractual Risk Shifting** – Michael Airdo & Mollie Werwas
3. **Moving Forward in the Midst of Multiple Transitions** – Dayna Larson-Hurst & Ray Mattes
4. **Juggling Complex Issues: What to Consider During Comprehensive Master Planning** – Sr. Nancy Conway, CSJ, Lynn Daly, Brian Dolehide & Julie Heiberger
5. **Cyber Security Awareness & Best Practices** – Holly Boullion

WEDNESDAY, OCTOBER 2

10:30 AM **BREAK**

11:00 AM – 12:30 PM **SESSION 2**

6. **Meeting the Challenge of *Mensuram Bonam*** – Jeffery McCroy
7. **Tax Exemption Topics for Religious Institutions** – Jennifer Gniady
8. **Fundraising for Communities Moving Toward Fulfillment** – Anne Marie Gardiner & Sr. Kathleen Lunsmann, IHM
9. **Generative AI (Artificial Intelligence) and the Religious Institute and Sponsored Ministry: Introduction and Recent Developments 2024** – Christopher Fusco, JCL, Esq. & Br. Lawrence Harvey, CFX
10. **Pulling Back the Curtain: A Primer on Appreciating the Importance of Catholic Religious Collections for United States History** – Carol Coburn, Barbara Mattick, Malachy McCarthy & Thomas Rzeznik

12:30 – 2:00 PM **LUNCH BUFFET**

2:00 – 3:30 PM **SESSION 3**

11. **Interpreting TRENDS for Leadership** – Sr. Susan Durkin, OSU & Matt Wade
12. **Building the Bridge for Religious Workers – Immigration Issues for International Religious Workers** – Graciela Mateo & Miguel Naranjo
13. **Community and Sustainability: Navigating the Decarbonization Journey** – Henry Hundt & Bob Warwick
14. **Leadership, COO, and CFO: The three-legged stool approach to Mission and Administration** – Sr. Sharon Abela, IHM, Bethany Jaeger, Monica McGowan & Toni Ponder
15. **Welcome Home: Supporting members transitioning to a new "home"** – Dayna Larson-Hurst & Sr. Stephanie Still, PBVM

3:30 PM **BREAK**

4:00 – 5:30 PM **SESSION 4**

16. **DIY Search** – Mary Foley, & Rev. John D. Merkelis, OSA
17. **The Importance of Relationships for Mind, Body and Soul** – Anne Kertz Kernion
18. **"New Treasures": A Call to Collaboration** – Jessica Cook, Sr. Teresa Maya, CCVI, Bridget McDermott Flood & Sr. Helena Monahan, CCVI
19. **Conversations with Commissaries: A Year Later** -Moderator: Sr. Sharon Euart, RSM, Panelist: Sr. Janice Bader, CPPS, Sr. Paula Cooney, IHM, Fr. David Cray, SSE, Sr. Jane Hibbard, RNJM & Sr. Helen Kearney, CSJ
20. **Top 5 Challenges in Managing Transportation for Religious Communities** – Brad Forbush & Doug Reading

FREE EVENING

THURSDAY, OCTOBER 3

7:30 AM **BREAKFAST/EXHIBIT HALL**

8:30 AM **PRAYER**

9:00 – 10:30 AM **SESSION 5**

21. **Sharing a Chief Operating Officer (COO)** – Sr. Susan Becker, RDC, Sr. Regina Holtz, FSP, Sr. Mary Catherine Redmond, PBVM & Sr. Paricia Vetrano, RSM
22. **Managing the Employee Lifecycle: Pointers from Recruitment Through Separation** – Michael Airdo & Mollie Werwas
23. **On-Site Solar: Incentives, Financing, and Cost Savings** – Jeff Bohrer & Monica Niehaus
24. **Difficult Personalities** – Sr. Mercedes McCann, RSM, PhD
25. **Moving into the future with wisdom, age** – Sr. Amy Hereford, CSJ, JD, JCD

10:30 AM **BREAK**

11:00 AM – 12:30 PM **SESSION 6**

26. **Demystifying Impact Strategies** – Zela Astarjian, Sr. Sue Ernster, FSPA Dave Helgerson & Elizabeth Monticelli
27. **Getting Started with Structures** – Mark Chopko & Jennifer Gniady
28. **Best Practices in Managing Your Human Resources –** Mary Kessler
29. **Blue Zones – What are they and how can we take aspect of them into the ministry of self** – Stephen Waldorf
30. **Thriving Together: Innovative Approaches for Aging Congregations** – John Capasso

12:30 – 2:00 PM **LUNCH ON YOUR OWN**

2:00 – 3:30 PM **SESSION 7**

31. **Advanced Topics in Accounting** – Adam Counts, Joseh Jarvie & Kellie Ray
32. **Volunteers: Legal Considerations for Religious Institutes** – Michael Airdo & Mollie Werwas
33. **Being BOLD – Affiliations/Partnerships to Ensure Viability of Ministries: A Case Study on How One Community Searched for a New Owner to Carry Their Legacy into the Future** – Craig Abbot, Lynn Daly & Sr. Jane Herb, IHM,
34. **Collecting, Cluttering, or Hoarding?** – Sr. Luann Brown, BVM & Sr. Julie Bruss, SND
35. **What's Up with Archives and Why Should I Care?** – Sr. Jan Cebula, OSF, Sr. Ginger Downey, OLVM, Sr. Susan Durkin, OSU, Sean Hurley, Patricia Lawton & Ellen Pierce

THURSDAY, OCTOBER 3

3:30 PM	**BREAK**
3:45 – 5:15 PM	**SESSION 8**

36. **Congregational Sustainability Planning: Are You Still on the Right Path?** – John Bolton & Renee Gallagher
37. **Liability Game: Best Practices for Managing a Liability Claim** – Jeff Harrison & Doug McKenna
38. **Beyond Conservation: Imagining a Land Justice Property Plan** – Brittany Koteles, Janelle Orsi & Sr. Pat Siemen, OP
39. **Intervention: How to Help** – Jeff Henrich
40. **Canonical Conundrums in the Cloister: A Case Study Approach** – Sr. Nancy Bauer, OSB, JCD

5:30 PM	**CONFERENCE LITURGY**
	FREE EVENING

FRIDAY, OCTOBER 4

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

41. **2024 – 2025 Government Programs Update** – Constance Neeson & Lisa Anderson

DESCRIPTIONS

TUESDAY, OCTOBER 1

7:30 AM **MASS**

8:00 AM **CONTINENTAL BREAKFAST**

PRE-CONFERENCE WORKSHOPS

9:00 AM – 12:00 PM **TRENDS FOR BEGINNERS – MATT WADE**

This 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 workshop is primarily designed for finance office personnel and for those tasked with using the TRENDS Excel program file. The emphasis will be on how to prepare and input census and financial data into the matrix and the program itself. This year, issues related to Cost of Care and the Retirement Needs Analysis will also be highlighted. Troubleshooting and addressing more difficult issues such as level of care assessment and error messages will be covered. 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. It is recommended that those who attend should have purchased TRENDS 2021 and be familiar with Excel.

9:00 AM – 4:30 PM **LEGAL UPDATES FOR RELIGIOUS INSTITUTES – 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.

3:00 PM **ATTENDEE CHECK-IN / EXHIBITS OPEN**

5:30 PM **WELCOME AND PRAYER**

CHALLENGED TO SYNODAL LEADERSHIP: WHAT IS OURS TO DO? – SR. TERESA MAYA, CCVI

Synodality challenges Catholic leadership. Religious institutes must discern how to ensure that our governance structures, decision-making and operational processes are synodal. While communal discernment and circle process have been a practice of many institutes, synodality challenges us to assess how effectively these processes have transformed our culture. Let us reflect together on the practical ways in which leadership can ensure our institutes are laboratories for synodality for our Church and society.

Sister Teresa Maya is a member of the Congregation of the Sisters of Charity of the Incarnate Word, San Antonio. She has served as teacher, history professor, administrator, leader, facilitator and speaker. She has passion for formation of ministers who are committed to transformation of Church and society. She has a commitment to life-

long learning and a strong conviction in the future of consecrated life. Sister Teresa received her B.A. at Yale University, her M.A. at the Graduate Theological Union at Berkeley and the Ph.D. in El Colegio de Mexico in Mexico City. She served fourteen years in the leadership of her religious institute and on the Leadership Conference of Women Religious (LCWR) presidency from 2016-19. She accompanies other religious congregations as facilitator and consultant. She is currently serving as Senior Director for Theology and Sponsorship in the Catholic Health Association (USA).

6:45 PM **RECEPTION**

WEDNESDAY, OCTOBER 2

7:00 AM **EUCHARIST**

7:30 AM **BREAKFAST/EXHIBIT HALL**

8:30 AM **PRAYER**

9:00 – 10:30 AM **SESSION 1**

1. **The Evolution of Community Investing and Religious Congregation Strategies** – Jeannine Jacokes, Cathi Kim, Kenya Davenport & Sr. Marlin Llanes, OP

Religious institutes have been on the leading edge of community investing since its humble beginnings in the 1970s to address redlining and disinvestment in low income and minority communities. Their work seeded the creation of the Community Development Financial Institutions (CDFI) sector, which has blossomed into 1,500 lenders nationwide. In December 2023, the US Treasury Department's CDFI Fund published new guidelines for lenders to retain this designation – which may change which organizations can still call themselves CDFIs or how they operate. At this critical juncture, this panel representing diverse types of CDFIs will discuss how community investing has evolved in the past three decades, what the future holds, and how and which CDFIs will fit into the community investing strategies of religious institutes. Partners for the Common Good (Partners), Southern Bancorp, and Inclusiv will discuss evolution of the sector and the future. Adrian Dominican Sisters, a pioneer in impact investing, will discuss how their impact investing over time has evolved, in addition to discussing if and how the new CDFI certification could impact how they evaluate CDFIs for future investing.

2. **Coverage and Contractual Risk Shifting** – Michael Airdo & Mollie Werwas

What happens when someone is injured on your institute's property? What do you do when one of your members causes a car accident that results in injury or death? What if one your employees commits an act of abuse or engages in harassment? To prepare for the potential liability it faces each and every day your institute can obtain insurance coverage and include risk shifting language in its contracts with third-parties to best position itself in legal disputes. This workshop will discuss the different types of coverages and risk shifting mechanisms available to religious institutes that will ensure that the patrimony of the institute is secure.

3. **Moving Forward in the Midst of Multiple Transitions** – Dayna Larson-Hurst & Ray Mattes

This session will highlight the sometimes-overlooked components of transitions faced by religious institutes in an era of fewer numbers, multiple layers of decision making and the rapidity of change. Culture, systemic dynamics and the impact on physical, psychosocial, spiritual and emotional well-being will be explored.

4. **Juggling Complex Issues: What to Consider During Comprehensive Master Planning** – Sr. Nancy Conway, CSJ, Lynn Daly, Brian Dolehide & Julie Heiberger

As numerous communities are faced with addressing their future state, many have questions on how to get started. What are the various aspects to consider (and be responsible for) when creating a comprehensive master plan? Where do you start? Who do you need on your team? How do those aspects interrelate to one another? How do you develop an action / implementation plan that will actually be used? What do we tell our communities? How on earth do you juggle all issues at once? Our session will explore some typical (and maybe a few a-typical) aspects of ensuring that a planning effort is comprehensive enough to provide decision makers with valuable information in order to make solid decisions. Topics include items such as TRENDS, neighborhoods, finance, operations, ministries, property, underutilized properties, and more.

5. **Cyber Security Awareness & Best Practices** – Holly Boullion

Religious institutions are not immune to cyberattacks. Regardless of your organization's size or complexity, if you have access to sensitive information, use online services, or maintain data that is critical to your operations, you could be a perfect target for an attack. In today's world, cybersecurity is not just a problem for the IT department. Every staff member plays a critical role in protecting your organization and its constituents. If you want to remain operational to carry out your mission, it's imperative to increase awareness of information security topics within your user base, and this workshop is designed to help you do just that. This session will provide information on current threats and mitigation strategies in a way that all employees can understand. Topics covered can be used as guidelines for training your employees and constituents.

10:30 AM **BREAK**

11:00 AM – 12:30 PM **SESSION 2**

6. **Meeting the Challenge of *Mensuram Bonam*** – Jeffery McCroy

This session will be a CBIS-hosted panel discussion focused on educating Catholic asset owners/managers on implementing the call to action of *Mensuram Bonam*. The panel will cover the practical implementation of *Mensuram Bonam*, highlighting real-world applications, challenges faced, and lessons learned. Additionally, the discussion will delve into high-level concepts surrounding *Mensuram Bonam*, exploring its potential impact on Catholic—and faith-consistent investing. Background: In 2022, *Mensuram Bonam*, a set of faith-consistent guidelines for Catholic investors, was published to provide a foundation for applying faith-consistent criteria to financial stewardship. The document aims to serve as a resource for entities to integrate Catholic Social Teaching into their investment policies.

7. **Tax Exemption Topics for Religious Institutions** – Jennifer Gniady

The vast majority of Catholic institutes and their ministries obtain federal tax exemption through the group ruling held by the United States Conference of Catholic Bishops. During this session, we'll walk through the application processes and the obligations that come with exemption under the group ruling, including the relationship of dioceses to religious institutes and the most common issues that delay applications. We'll also talk about the connection to The Official Catholic Directory for those organizations that have their own federal exemption determination. Attendees will come away with insight into how some of the IRS processes are different for members of a group ruling and practical resources for resolving issues with their tax exemption. In addition, we will touch on the role that tax exemption and the OCD play in decisions about compensation to religious members, as well as additional timely tax topics, such as new guidance from the IRS for unrelated business income, conversions between types of exempt entities, and developments in specific tax programs such as the Employee Retention Credit.

8. **Fundraising for Communities Moving Toward Fulfillment** – Anne Marie Gardiner & Sr. Kathleen Lunsmann, IHM

This presentation will focus on fundraising strategies for communities that are moving towards completion. We will share ideas for raising funds for ministry, programs, and care for aging members. We will focus our talk on best practices for communicating with donors and encouraging their continued support as the community works through difficult times. Our presentation will include some best practices for collaboration with development and communication staff in ensuring "messaging" is clear.

9. **Generative AI (Artificial Intelligence) and the Religious Institute and Sponsored Ministry: Introduction and Example of Use in Ministry** – Christopher Fusco, JCL, Esq. & Br. Lawrence Harvey, CFX

In January 2023, Chat GPT passed 100 million users after 3 months. By contrast, Facebook passed 100 million users after 54 months. By January 2024, Chat GPT had 181 million users and in December 2023, its website generated 1.6 billion visits. This presentation will provide a brief introduction to AI and highlight some legal, ethical and risk management considerations that a religious institute or sponsored ministry should keep in mind: misinformation, privacy, defamation, cybersecurity, regulatory activity, and broader societal discussions. It will also include a discussion on creating, administering, and implementing an AI Policy for the religious institute or sponsored ministry. The presentation will conclude with a real-world example of how AI has been used by a religious institute in evaluating how its charism has impacted the lives of those its serves through its sponsored ministries.

10. **Pulling Back the Curtain: A Primer on Appreciating the Importance of Catholic Religious Collections for United States History** – Carol Coburn, Barbara Mattick, Malachy McCarthy & Thomas Rzeznik

The Roundtable brings to fore why religious collections are important for society and future understanding of religious life. Too often, religious archives are considered the dustbins of history when in fact they contain the rich narratives of men and women committed to a better society. Each religious community had a unique role to play in nation-building, whether it be education, healthcare, or social welfare. Their individual response to local issues demonstrated Christ's presence among these underserved populations.

12:30 – 2:00 PM **LUNCH BUFFET**

2:00 – 3:30 PM **SESSION 3**

11. **Interpreting TRENDS for Leadership** – Sr. Susan Durkin, OSU & Matt Wade

Designed for leaders and councilors, this workshop will focus on how to interpret the data and results of your completed TRENDS analysis. It is appropriate for religious institutes of all types, charisms and sizes. Highlights will include discussion of the mortality tables, the impact of future vocations, and the importance of realistic cost of care and elder care assessments. TRENDS will be compared to the NRRO's Retirement Needs Analysis report and time will be spent interpreting their meaning. Questions related to being adequately funded for retirement will be addressed. The Past Service Liability will be explained as well as the impact of cash flow on retirement funding. The goal is to help leadership ensure that there are sufficient resources for both elder care and ministry. The strengths and limitations of the program will be discussed, such as the appropriateness of TRENDS for international institutes. The various charts and graphs within the TRENDS program will be explained.

12. **Building the Bridge for Religious Workers – Immigration Issues for International Religious Workers** – Graciela Mateo & Miguel Naranjo

This interactive workshop will focus on the recent challenges faced by religious workers and provide a basic understanding of the visa process required for international religious workers to serve the Church in the U.S. In this workshop, the panelists will discuss the R-1 religious worker visa along with the religious worker permanent residency process with a focus on best practices and strategies for Vocation Directors. In addition to the R-1 religious worker visa, the panelists will discuss different visa options for religious individuals.

13. **Community and Sustainability: Navigating the Decarbonization Journey** – Henry Hundt & Bob Warwick

Our presentation will examine intersection of faith and environmental stewardship, by exploring how religious communities can help combat climate change through building decarbonization. The workshop will introduce the concept of decarbonization in an accessible way, highlighting its significance in reducing greenhouse gas emissions and offering practical, cost-effective strategies tailored for older religious buildings. These strategies include enhancing energy efficiency, electrification, on-site renewable energy generation, and smart energy management. The presentation will feature the detailed experience of the Dominican Sisters of San Rafael (CA) on their decarbonization journey in addition to lessons from various religious communities that have successfully undertaken decarbonization projects. The best practices will underscore the environmental and financial benefits that can be achieved when reducing building energy consumption and emissions. The talk will also provide guidance on financing options and community engagement, and an overview of current technologies to consider. Finally, attendees will receive a step-by-step roadmap to help start their decarbonization journey, equipped with resources for further assistance and a network of support for these initiatives.

14. Leadership, COO, and CFO: The three-legged stool approach to Mission and Administration – Sr. Sharon Abela, IHM, Bethany Jaeger, Monica McGowan & Toni Ponder

The practice of Leadership teams overseeing or directly managing administrative functions is becoming increasingly unsustainable. While Leadership is called to be more present with their members and their evolving needs, the administrative landscape of managing a province or congregation has become increasingly more complex for Leadership to navigate simultaneously. These complexities include evolving eldercare and healthcare models, sophisticated management of fiscal and property resources, and compliance with regulations, labor and employment issues, and other periodic, but immediate, administrative issues often arise. Something has to give. This workshop will focus on emerging administrative models with practical examples of how administrative executives can partner with Leadership teams to focus more on their canonical responsibilities and life of the mission and members and less on business and operations of the civil corporation.

15. Welcome Home: Supporting members transitioning to a new "home" – Dayna Larson-Hurst & Sr. Stephanie Still, PBVM

When a person needs to move due to a need for increased support or other circumstances, we want the transition to go smoothly. We want there to be no conflicts and no challenges and we want them to embrace this change. As much as we wish this to be true, we know this is not always the case. During this workshop we will share some of the common dilemmas and obstacles that can occur and how you may be able to mitigate them to make for a smoother transition home.

3:30 PM — **BREAK**

4:00 – 5:30 PM — **SESSION 4**

16. DIY Search – Mary Foley, & Rev. John D. Merkelis, OSA

Many religious institutes are facing widespread retirements and the need to find new individuals to take on the mantle of leadership and administration. While executive search firms can offer value to the process, religious organizations can undertake successful, independent searches and save time and money. This session's 10 Steps to Search Success will provide you with a highly effective search process; address common missteps and how to avoid them; illustrate the importance of onboarding and year-one follow-up, particularly if the transition is to a first-time lay leader; provide options for hybrid search plans and better enable you, should you prefer to engage a search firm, to evaluate the processes and merits of those under consideration.

17. The Importance of Relationships for Mind, Body and Soul – Anne Kertz Kernion

We have an epidemic of loneliness in our country, which is partially to blame for the rise in depression and anxiety among young and old alike. Our workshop will explore the ramifications of loneliness and the blessings of connections. We'll discover how incredibly interrelated we are biologically, even in microscopic ways. And finally, we will look at the spiritual practices and others that are guaranteed to increase our connections and our health in mind and body. Come join us and be amazed, inspired, and delighted!

18. **"New Treasures": A Call to Collaboration** – Jessica Cook, Sr. Teresa Maya, CCVI, Bridget McDermott Flood & Sr. Helena Monahan, CCVI

Incarnate Word Foundation is initiating a NEW TREASURES FUND to serve as a visible witness to the shared commitment of Religious Congregations of men and women to serve the most vulnerable in our society. The Fund provides a vehicle to pool and invest a portion of the financial resources of Congregations, those coming to completion as well as those continuing to invite new vocations. Pooling maximizes their potential for responding to the needs of the area. The workshop will explain the steps required to launch such a program, legal implications, accounting implications, and designing decision-making processes for funding.

19. **Conversation with Commissaries: A Year Later**
– Moderator: Sr. Sharon Euart, RSM - Panelist: Sr. Janice Bader, CPPS, Sr. Paula Cooney, IHM, Fr. David Cray, SSE, Sr. Jane Hibbard, RNJM & Sr. Helen Kearney, CSJ

With the increasing number of commissaries serving religious institutes in the U.S., this workshop, a year later, will include a panel comprised of a leader of a women's institute preparing her institute for a commissary, a leader of a men's institute describing its discernment to seek a commissary, and three current commissaries serving in diocesan, pontifical and monastic institutes addressing the uniqueness of their respective structures and lived experience in carrying out the canonical and civil law responsibilities of the institute.

20. **Top 5 Challenges in Managing Transportation for Religious Communities**
– Brad Forbush & Doug Reading

This workshop introduces the findings of a nationwide survey of religious institutes that identify how the transportation needs of communities are changing due to the aging population of drivers and the rising cost of providing vehicles and related services. You will discover the Top 5 Challenges compiled from the survey results, and you'll have the opportunity to discuss practical solutions with a panel of experts including a member of Religious Leadership, a Controller of a Congregation and several experts from the insurance and transportation industries. During the workshop a facilitator will guide you through an Action Planning process to help you begin to develop a 2024 Transportation Strategy for your community.

FREE EVENING

THURSDAY, OCTOBER 3

7:30 AM **BREAKFAST/EXHIBIT HALL**

8:30 AM **PRAYER**

9:00 – 10:30 AM **SESSION 5**

21. Sharing a Chief Operating Officer (COO) – Sr. Susan Becker, RDC, Sr. Regina Holtz, FSP, Sr. Mary Catherine Redmond, PBVM & Sr. Patricia Vetrano, RSM

The workshop will be presented by the members of the three participating institutes. The presentation will include the process through to its development and engagement of the COO. The workshop will cover achieving consensus on the methods by which common needs and understanding of each other's particular needs, existing services, service structure, project cost, and cost-sharing were considered. Sr. Patricia Vetrano will discuss her experience relative to the utilization of a COO during her tenure as President of the Sisters of Mercy Mid-Atlantic Community.

22. Managing the Employee Lifecycle: Pointers from Recruitment Through Separation – Michael Airdo & Mollie Werwas

Now, more than ever, recruiting, developing, and retaining good employees while parting ways with not-so-good employees is vital to the success of every institute. This includes providing honest evaluations during performance reviews and taking advantage of coaching opportunities when they are presented. Managing each step of the employee lifecycle, though, requires different sets of skills, focus, knowledge, and systems. Ever changing compliance duties can set you up for failure before you know something is wrong. That's why it is important to know what you don't know so that you can ask for help. This presentation will give an overview of some of the biggest missteps institutes make and provide real world tips for ensuring you don't lose top talent and get stuck with poor performers or, worse yet, "bad apples" that use the confidential information and systems entrusted to them for their own personal benefits and exploits. This presentation will also provide recommended policies and procedures that religious institutes can use to protect themselves against the damage that "bad apples" can cause.

23. On-Site Solar: Incentives, Financing, and Cost Savings – Jeff Bohrer & Monica Niehaus

Learn how Jeff Bohrer, Director of Facilities at Mount Saint John, made a case for a Net-Zero Energy campus in Beavercreek, OH. During this workshop, success stories will be shared from the Inflation Reduction Act, and case studies with economics will prove how onsite solar can "bring more green" including much-needed financial resources. *Laudato Si* and a call for care of creation started the solar movement at religious institutions for reducing carbon emissions. Because of financing solutions and new incentives, more non-profits can benefit from the cost savings of renewable energy.

24. Difficult Personalities – Sr. Mercedes McCann, RSM, PhD

All of us, lay, religious and clergy, at times interact with people whose personalities are challenging for us. At the same time our own personalities can be challenging for others. This presentation will cover the clinical definition of a difficult personality as well as the

personalities that simply "get on our nerves." The topic will cover the clinical definition of a personality disorder including the more common disorders generally found in religious communities. It will also cover the traits and features of these disorders which are more common in interactions but do not represent a full-blown personality disorder. It will further cover strategies individuals can put into place to help them interact with persons who are challenging in a kindly, civil manner while preserving their own boundaries and good mental health. Participants are requested to bring a mirror to the presentation.

25. Moving into the future with wisdom, age – Sr. Amy Hereford, CSJ, JD, JCD

This workshop will address the current issues facing many religious institutes regarding viability and governance, stewardship and legacy, decisions and due diligence, participation and collaboration.

Responsible stewardship for religious communities today requires attention to the rapidly changing viability of communities, and careful attention to options and possibilities, as well as the ability to examine options, balancing the costs of legal, financial, planning assistance with the cost of the care of its members and its property. Based on experience working with communities, the workshop will examine how long planning processes take, how communities balance community involvement and consensus with confidentiality and expediency. It will provide an overview and lessons learned from emerging governance models.

10:30 AM **BREAK**

11:00 AM – 12:30 PM **SESSION 6**

26. Demystifying Impact Strategies – Zela Astarjian, Sr. Sue Ernster, FSPA, Dave Helgerson & Elizabeth Monticelli

More and more, Catholic fiduciaries are making impact investing a priority which has become a key theme in messaging from the Vatican, as well as an ongoing topic amongst religious orders. In this session we will discuss how within the realm of impact investment strategies, two primary approaches exist: market return impact investments (involving profitable companies), and concessionary strategies (prioritizing social or environmental impact over financial returns). These strategies are not mutually exclusive, and both have a place within a Catholic-aligned endowment portfolio.

27. Getting Started with Structures – Mark Chopko & Jennifer Gniady

Whether your institute is facing growth, consolidation, or preparing for completion, a lot of effort goes into assessing what structures attach to an institute, its ministries, and its management. That process often involves exploring whether ministries historically associated with the institute should continue that association, seek mission sponsorship through some other canonical entity or something else, if they stay "Catholic" at all. This seminar will focus on outlining how an institute can evaluate these issues and look at the types of structures available and the process for moving forward intentionally. Whether you're looking at creating sponsored ministries, seeking synergies inside or outside the institute, or wondering where to start in planning for the future, we'll look at how to evaluate the structures available to you. The session will focus on the process for putting the pieces in place in a way that reflects the substance of your institute and plans for changes at a manageable scale and pace, including employee and contract issues to be aware of along the way.

28. Best Practices in Managing Your Human Resources – Mary Kessler

Managing your human resources has become more difficult in these ever-changing times. This workshop will examine what the best employers are doing to stay up to date with the latest trends and priorities facing managers and leadership in men's and women's religious congregations. Topics include building effective teams, training in relevant skills, fair performance-based compensation and selective hiring. Practical examples and user-friendly tools are included.

29. Blue Zones – What are they and how can we take aspect of them into the ministry of self – Stephen Waldorf

This dialogue will explore the phenomenon of blue zones across the globe, regions where individuals achieve remarkable longevity, often surpassing 100 years, and the underlying factors contributing to this exceptional reality. While we initially focus on this exploration, the discourse will transition to examining the disparities in our living environments and their impact on quality of life. Religious communities exhibit many characteristics akin to those found in blue zones, yet they often do not fully emulate them. Shifting from the specific to the broader societal implications, I will guide the discussion towards personal introspection on the importance of self-care and ministry to oneself, highlighting its critical relevance in today's world and its attainability for all present.

30. Thriving Together: Innovative Approaches for Aging Congregations – John Capasso

Across the country, religious congregations are facing extreme challenges. From providing and affording necessary care to their aging members, to convent maintenance, a lack of new members, and increasing administrative and financial responsibilities, difficulties are mounting. In this session, we will explore these challenges, and the unique strategies and solutions congregations can deploy to overcome them. In real-world case studies, you'll learn how Health Dimensions Group (HDG), assisted several women religious congregations in identifying ways to address their aging motherhouses, fund their retirements, care for older Sisters and maintain their sense of community. HDG partnered with the congregation's leaders and leadership teams in 2023 to assess their challenges and opportunities. Interviews began with the congregations' leaders, followed by visits to each community, convent tours and meetings with their leadership teams. The meetings explored the joys and fears of aging, congregational challenges and preferred ways for the sisters to receive care and services. After gathering this and additional information, HDG developed a SWOT analysis and recommendations for each congregation, to provide care and services for their aging members. Finally, HDG will facilitate a capstone meeting in January to explore ways in which the congregations could collaborate to achieve a more efficient collaborative model of care.

12:30 – 2:00 PM **LUNCH ON YOUR OWN**

2:00 – 3:30 PM **SESSION 7**

31. Advanced Topics in Accounting – Adam Counts, Joseh Jarvie & Kellie Ray

Individuals interested in learning about implications of accounting standards affecting religious congregations at a moderate to advanced level. The presentation includes a variety of topics that will help participants to identify potential accounting and finance issues to be addressed at their Community including but not limited to internal controls, common accounting items within religious communities and upcoming tax changes.

32. Volunteers: Legal Considerations for Religious Institutes – Michael Airdo & Mollie Werwas

This presentation will address how to manage the legal challenges and responsibilities associated with the use of volunteers by religious institutes. Our session aims to equip religious leadership, administrators, and staff with essential knowledge and best practices regarding volunteer recruitment, screening, training, and supervision. The presentation will also discuss risk assessment and compliance with relevant legal standards. This presentation promises to provide actionable insights, empowering religious institutes to proactively manage volunteers in an ever-evolving legal landscape.

33. Being BOLD – Affiliations/Partnerships to Ensure Viability of Ministries: A Case Study on How One Community Searched for a New Owner to Carry Their Legacy into the Future – Craig Abbot, Lynn Daly & Sr. Jane Herb, IHM

Under the leadership of Sr. Jane, the IHM's in Monroe, Michigan were forward looking, knowing that the ownership and maintenance of their Motherhouse campus, which includes the IHM Senior Living Community, was something they wouldn't want to have the burden of caring for in the medium-term future. This session will be a case study on how the IHM's determined it was time to sell their campus and senior living ministry (of which many Sisters are residents). Sr. Jane will discuss the discernment process to get to that history-making decision. Lynn Daly will talk about the search process, including an exercise incorporated early in the process to ensure alignment between individual members of the IHM Leadership and the Board of the Senior Living Community. Finally, Craig Abbott will discuss why St. Therese, a multi-site senior living community in Minnesota, was interested in buying a Motherhouse campus in a different state. Attendees will leave with "Points to Ponder" and "Lesson's Learned" by those who were part of this significant milestone in the IHM's long-history. We will ensure sufficient time is allotted to allow attendees to ask questions.

34. Collecting, Cluttering, or Hoarding? – Sr. Luann Brown, BVM & Sr. Julie Bruss, SND

The excess accumulation of material goods is a growing challenge in religious communities. In this session, we will identify symptoms and characteristics of the spectrum of hoarding disorder: collecting, cluttering, and hoarding. The presentation will address the causes of the disorder as well as ways to address it in the context of behavioral or process addictions.

35. What's Up with Archives and Why Should I Care? – Sr. Jan Cebula, OSF, Sr. Ginger Downey, OLVM, Sr. Susan Durkin, OSU, Sean Hurley, Patricia Lawton & Ellen Pierce

The archives for congregations of women and men hold the memory of the congregation and tell their story, not only the good works, but the members who contributed to the overall story of religious life. The importance of planning for these collections cannot be underestimated and the value of the archives in telling accurate stories to future generations is priceless. Leaders and Archivists have articulated that their focus is on more pressing needs, or that this is a daunting process or that they don't know how to begin. At the same time, congregation members wonder why collections need to be saved and who might be interested in using them. These collections are worth saving. This panel presentation will focus on the importance of these collections to researchers and future generations while also discussing the more practical aspects. We will hear about the process through the eyes of a leader, a librarian, an archivist, and an attorney. Attendees will hear tips, strategies and learn about resources to help them through this process. Information shared will benefit leaders and staff of women's and men's congregations.

THURSDAY, OCTOBER 3

3:30 PM **BREAK**

3:45 – 5:15 PM **SESSION 8**

36. Congregational Sustainability Planning: Are You Still on the Right Path? – John Bolton & Renee Gallagher

As Congregations continue to mature, organizational sustainability remains a critical topic. Ensuring your Congregation has a well-defined process to incorporate financial obligations modeling with portfolio asset allocation decisions will be an important driver in meeting long-term objectives. Many Congregations are also integrating impact investing into their portfolios, which may introduce unique risk / return characteristics into your financial modeling. Additionally, investment markets have undergone changes, as the "zero interest rate" regime seems to be in the rearview. These factors necessitate rethinking how sustainability is modeled for your Congregation. Each Congregation has both opportunities and challenges based on their lifecycle and resources. We will review best practices when reviewing your organization's sustainability, as well as encourage self-reflection on your Congregation's own planning efforts.

37. Liability Game: Best Practices for Managing a Liability Claim – Jeff Harrison & Doug McKenna

Liability exposures and coverages have changed significantly over the last 25 years, as have awarded verdicts. Using a fun interactive game played by all, this workshop will review a wide variety of liability coverages, best practices on managing a liability claim, review of actual losses that have been denied, and discussion on how best to protect your ministry moving forward.

38. Beyond Conservation: Imagining a Land Justice Property Plan – Brittany Koteles, Janelle Orsi & Sr. Pat Siemen, OP

Land Justice is the practice of centering ecological and racial healing in decisions about how land is used, loved, and governed by people. It has three components: protecting the land from extraction; regenerating its health; and expanding land equity to those who have been most harmed by our extractive economy – especially Black and Indigenous communities, and other people of color. Land justice calls us into a different way of relating with the Earth and each other. At this critical moment, religious communities have the potential to inspire a national conversation and movement for land justice – transforming long-held cultural and theological beliefs about property, land, and relationships, and inspiring healing stories on sacred lands. After a brief overview of land justice, participants will hear from a cast of key players in the creation of a "land justice property plan." By elaborating on land justice examples and stories from perspectives of sister, lawyer, and partner organization, we hope to debunk some of the myths about land justice and expand participants' imaginations about what's possible for the future of their lands. Among topics we'll explore: What's unhealthy about modern property law, and how can the decisions we make – and the experiments we try – help to change it? How can we create solidarity-based relationships with potential new stewards? What does land justice look like in action? How can religious communities support one another to take big risks while caring for one another?

39. Intervention: How to Help – Jeff Henrich

When a community member appears to be struggling with addiction or an unhealthy behavior, we are often hesitant to "get involved." In this session, we will explore what gets in the way of expressing concern. We will then focus on preparation for and the process of effective intervention in the context of love and care.

40. Canonical Conundrums in the Cloister: A Case Study Approach
– Sr. Nancy Bauer, OSB, JCD

This seminar will focus primarily on monasteries of nuns (moniales) but will also be helpful for monasteries of sisters (sorores). It will begin with an overview of how nuns are coping with *Cor Orans* six years after it made its appearance. The presenter will also provide an update on other newer church legislation as it applies to contemplative monasteries. The major portion of this seminar will consist of case studies that look at canonical resolutions to issues that are relevant to monasteries. The case studies will address questions such as the following: When is it time for a monastery to consider suppression? Are there advantages to transfer or translocation of a monastic community? What happens to the property and remaining members of a suppressed monastery? What are the necessary procedures for dismissal of a member? What is the relationship between a member on exclaustration and the prioress/abbess?

5:30 PM **CONFERENCE LITURGY**

FREE EVENING

FRIDAY, OCTOBER 4

7:00 AM **MASS**

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

9:00 – 11:00 AM **SESSION 9**

41. 2024 – 2025 Government Programs Update – Constance Neeson & Lisa Anderson

This workshop will cover the latest changes in government benefit programs for 2024, with a look ahead to pending changes for 2025, including 2024 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 or "Extra Help") for Medicare D, and State Prescription Assistance Programs (SPAP). We will also discuss changes in any 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 2024 RCRI National Conference, October 1–4, 2024. Lodging and events will be held at:

Rosen Centre Hotel
9840 International Drive
Orlando, FL 32819
Phone: (407) 996-9842

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 on 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 online form available here: **https://www.trcri.org/page/NCC2024**

Registration is available through September 20, 2024. You will save up to $50 by registering early!

	Before 7/26	After 7/26
RCRI members rooming at the Rosen Centre*	$500	$550
RCRI members not staying at the Rossen Centre*	$600	$650
Non–RCRI members	$750	$800

RCRI members include all members and employees of a religious institute with paid 2024 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 Rosen Centre.

*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 23rd, 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 24th to September 6th.
- On or after September 7th 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.**

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.

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 **Friday, August 23, 2024**. Reservations made directly to the hotel will not 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/rcri2024

Hotel Amenities

The Rosen Centre 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 $28 per day and valet parking is $40 a day with in and out access. These rates are subject to change.

Airport

Orlando International Airport (MCO) is located 15 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.

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 & SPONSORSHIP INFORMATION

RCRI is grateful to any organization willing to exhibit or sponsor a speaker, a meal, or a break, as it helps us offer a more affordable conference to religious institute members and employees. See exhibitor materials on our **conference website** 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 ensure inclusion of information in conference materials, please register by August 30, 2024.

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