Celebrating the Jubilee Year of Mercy

NATIONAL CONFERENCE
October 11-14, 2016
Anaheim Marriott | Anaheim California
On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, I extend a warm welcome to you to the 2016 annual conference. We look forward to an enjoyable, enriching and enthusiastic conference gathering in Anaheim, California.

With the assistance of the 2016 Conference Planning Committee, we have developed an exciting and full program covering topics many of you have suggested to us as well as workshops that we hope will assist you as you move forward in planning for the future of your institutes.

The theme of this year’s conference is a celebration of the Jubilee Year of Mercy, a time which Pope Francis proclaims “as a special time for the Church, a time when the witness of believers might grow stronger and more effective” (*Misericordiae Vultus*, n. 3). Pope Francis describes mercy as the “very foundation of the Church’s life” and urges us “to take up the call to mercy once more” and to witness to mercy in our contemporary world, opening our eyes to the misery of the world and our hearts to those living on the fringes of society (n. 15). Francis tells us that mercy is the force that reawakens us to new life and gives us the courage to look to the future with hope (n. 10).

Among the highlights of the 2016 conference will be the address by our keynote speaker, John L. Allen, Jr., Editor of *Crux* and a renowned journalist on coverage of the Vatican, on Tuesday evening, October 11. Prior to the opening, we will offer two pre-conference workshops on Tuesday, October 11, an all-day session for new treasurers and finance personnel, new leaders and leadership councils on management of religious institutes in the areas of finance, civil and canon law; and a half-day session (afternoon) on TRENDS for new users and those wishing a refresher course.

In addition to some 38 workshops, we have scheduled a general session for the Annual Update including the legal updates and updates from RCRI and NRRO. On Thursday afternoon, October 13, a conference liturgy will be celebrated for all participants.

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

Sincerely,

Sr. Sharon Euart, RSM
Executive Director
Celebrating the JUBILEE YEAR OF MERCY

Conference Schedule

TUESDAY • OCTOBER 11

8:00 AM – 4:30 PM  
PRE-CONFERENCE: MANAGEMENT ISSUES FOR NEW LEADERS AND FINANCE PERSONNEL OF RELIGIOUS INSTITUTES (MINI OMRI)  
SPEAKERS: Michael Airdo, Sr. Hertha Longo, CSA, Bro. Larry Lundin, SJ & Donna Miller  
REGISTRATION FEE: $275, Includes continental breakfast and lunch

1:30 PM – 4:3 PM  
PRE-CONFERENCE: TRENDS FOR BEGINNERS/REFRESHER FOR USERS  
SPEAKERS: Sr. Hertha Longo, CSA & Bro. Larry Lundin, SJ  
REGISTRATION FEE: $125

11:00 AM  
EXHIBITORS REGISTRATION AND BOOTH SET UP

3:00 PM  
ATTENDEE CHECK-IN / EXHIBITS OPEN

5:30 PM  
OPENING AND PRAYER

6:00 PM  
KEYNOTE ADDRESS • John L. Allen Jr.

7:00 PM  
RECEPTION

WEDNESDAY • OCTOBER 12

7:00 AM  
EUCARIST

7:30 AM  
BREAKFAST/EXHIBIT HALL

8:30 AM  
PRAYER

9:00 AM – 10:30 AM

SESSION 1

1. Managing Fixed Income in a Rising Rate Environment – Barbara McKenna

2. Is Collaborative Governance a Solution? – Sr. Kelly Connors PM, & Sr. Rose Dowling, FSM


4. Advanced Topics in Accounting – Kellie Goines, Sue Novak & Jeff Zeleji

5. Social Media and Technology Policies – Michael Airdo

10:30 AM

BREAK IN EXHIBIT HALL

11:00 AM – 12:30 PM

SESSION 2 – GENERAL SESSION ANNUAL UPDATE: IMPORTANT ISSUES FOR RELIGIOUS INSTITUTES AND THEIR SPONSORED MINISTRIES
Donna Miller – Legal; Sr. Sharon Euart, RSM – RCRI; NRRO

12:30 PM – 2:00 PM

CORT LUNCH BUFFET

2:00 PM – 3:30 PM

SESSION 3
7. Behaviors of a well-functioning Investment Committee – Joseph Matthews
8. The Importance of Cost of Care for Retirement Planning – Sr. Hertha Longo, CSA & Matt Wade
9. Transitioning Sponsorship – Sr. Amy Hereford, CSJ
11. Building Your Own Decision Tree for Evaluating Facilities – Lynn Daly, Shane Larson & Julia Walsh

3:30 PM

BREAK IN EXHIBIT HALL

4:00 PM – 5:30 PM

SESSION 4
15. See how they love one another!? – Sr. Mary Ellen Merrick, IHM
17. Wayfinding in an Era of Completion – Ray Mattes, IHM

FREE EVENING
Celebrating the JUBILEE YEAR OF MERCY

THURSDAY • OCTOBER 13

7:30 AM  BREAKFAST/EXHIBIT HALL
8:30 AM  PRAYER
9:00 AM – 10:30 AM  SESSION 5
18. Real Estate Review – Mary Reichert
19. Religious Workers: Going from R-1 Visa to Green Card – Nicole Bonjean & Minyoung Ohm
20. Effectively sharing your financial information with your stakeholders – Laurie Horvath, Ellen Labita, Krista Pankop & Brian Sanvidge
22. When Should A Congregation Outsource Finance And Accounting Services? – Phil Capps & Kate Ward

10:30 AM  BREAK IN EXHIBIT HALL

11:00 AM – 12:30 PM  SESSION 6
23. Find Secure Footing on Unstable Ground: Navigate your way through the unchartered territory of the Patient Protection and Affordable Care Act (PPACA) – Sr. Geraldine Hoyler, CSC
25. How to discuss investing with values with your consultant/managers – Sr. Sandra Delgado, OP, Sonia Kowal & Bryan Pini
27. Supporting Our Members Living with Dementia – Sr. Paula Cooney, IHM

12:30 PM – 2:00 PM  LUNCH ON YOUR OWN
2:00 PM – 3:30 PM

SESSION 7

28. How do I deal with My Problem Employees? – Mary Kessler

29. ASSETS IN ACTION: How Three Catholic Institutions Use Their Assets to Act on Climate Change – Investments to Counter Climate Change – George Hanley, Nora Nash, John O’Shaughnessy and Ryan Strode


31. Leaving a Legacy with Land Trusts – Pat Del Ponte, Sr. Ginger Downey & Jason Kissel

32. What Leaders Need to Know About Person-Centered Home Health Care for Older Members – Rev. James Greenfield, OSFS & Sr. Catherine Howard, OP


3:30 PM

BREAK

3:45 PM – 5:15 PM

SESSION 8

34. Mission and Charism, Today and Tomorrow: How Do I Know Which is Which? – Sr. Carol Zinn, SSJ

35. Achieving Positive ESG Impact with Market Rate Fixed Income Investments – Cheryl Smith, Ph.D.


38. The Power of Earth, Wind & Fire: Renewable Energy Options for Reducing Your Carbon Footprint – Mark Hanson & Sr. Rose Jochmann, OSF

5:30 PM

CONFERENCE LITURGY

CONFERENCE CLOSES/FREE EVENING

FRIDAY • OCTOBER 14

7:30 AM

GRAB AND GO BREAKFAST
Pre-Conference Workshops

TUESDAY • OCTOBER 11

7:00 AM

PRE-Congress 7:00 AM – 4:30 PM
PRE-CONFERENCE REGISTRATION & CONTINENTAL BREAKFAST

The Workshop, a mini OMRI, will provide an overview of financial and legal topics that form a foundation for the operation of a Religious Institute in the financial, civil and canonical fields. The presenters will address, among other topics, stewardship of religious institutes, language and terminology, materials that finance personnel should share with leadership, members and patrimony, risk management issues, and employment issues.

SPEAKERS: Michael Airdo, Sr. Hertha Longo, CSA, Bro. Larry Lundin, SJ & Donna Miller

REGISTRATION FEE: $275, Includes continental breakfast and lunch.

1:30 PM – 4:30 PM

PRE-CONFERENCE: TRENDS FOR BEGINNERS/REFRESHER FOR USERS

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

SPEAKERS: Sr. Hertha Longo, CSA & Bro. Larry Lundin, SJ

REGISTRATION FEE: $125

CONFERENCE OPENING

3:00 PM

ATTENDEE REGISTRATION / EXHIBITS OPEN

5:30 PM

WELCOME AND PRAYER

6:00 PM

KEYNOTE ADDRESS • John L. Allen Jr.

John L. Allen Jr. is the editor of Crux, an independent Catholic news site in partnership with the Knights of Columbus, and previously served both as a senior correspondent for the National Catholic Reporter and later as associate...
editor of the Boston Globe. He’s the senior Vatican analyst for CNN, the author of ten books on the Vatican and Catholic affairs, and a popular speaker both in the United States and abroad.

The London Tablet has called Allen “the most authoritative writer on Vatican affairs in the English language,” and renowned papal biographer George Weigel has called him “the best Anglophone Vatican reporter ever.”

When Allen was called upon to put the first question to Pope Benedict XVI aboard the papal plane en route to the United States in April 2008, the Vatican spokesperson said to the pope: “Holy Father, this man needs no introduction.”

That’s not just a Vatican judgment. Veteran religion writer Kenneth Woodward of Newsweek described Allen as “the journalist other reporters – and not a few cardinals – look to for the inside story on how all the pope’s men direct the world’s largest church.”

Allen’s work is admired across ideological divides. The late liberal commentator Fr. Andrew Greeley called his writing “indispensable,” while the late Fr. Richard John Neuhaus, a conservative, called Allen’s reporting “possibly the best source of information on the Vatican published in the United States.”

Allen’s most recent book is *The Francis Miracle: Inside the Transformation of the Pope and the Church*. John divides his time between Rome and his home in Denver, Colorado. He grew up in Western Kansas, and holds a Master’s degree in Religious Studies from the University of Kansas.

7:00 PM

**RECEPTION**

**WEDNESDAY • OCTOBER 12**

7:00 AM

7:30 AM

8:30 AM

9:00 AM – 10:30 AM

**EUCHARIST**

**BREAKFAST/EXHIBIT HALL**

**PRAYER**

**SESSION 1**

1. **Managing Fixed Income in a Rising Rate Environment** – Barbara McKenna

   It’s time for investors to evaluate their fixed income portfolios for a new rate cycle. Learn how to prepare for what’s next. This session will address the potential path for Fed policy and how the Fed’s decisions can affect your investment decisions. Ms. McKenna will discuss the implications of rising rates across fixed income sectors and the maturity curve in addition to highlighting signals to watch and considerations in portfolio positioning.
2. **Is Collaborative Governance a Solution?** – Sr. Kelly Connors, PM & Sr. Rose Dowling, FSM

What do we do when we are unable to fulfill the roles of internal leadership? Rose will share the processes that led to establishing the Collaborative Governance Project. She and Kelly will elaborate on the development of the model and how it was communicated to and received by the members of the involved institutes. Kelly will expand upon the strengths and adaptability of the model to diverse and changing needs of religious institutes.


This workshop covers the planning, preparation and onboarding of employees during a successful job search, including procedures and tools for solid performance management. Each part of the employment cycle is discussed, since this has a direct impact on employee success and also helps to minimize the high cost of turnover. Other topics include: behavioral interviewing techniques, orientation and onboarding and giving employee feedback in appropriate and legal ways. Practical information and sample tools are included.

4. **Advanced Topics in Accounting** – Kellie Goines, Sue Novak & Jeff Zelejsi

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 issues to be addressed at their Community. For example: variations in account and reporting; Accounting for Leases; Services of Personnel of an Affiliate; Not-For-Profit Financial Reporting; Other New or Relevant Accounting Issues. As well as time for question and answer.

5. **Social Media and Technology Policies** – Michael Airdo

Facebook. Twitter. Instagram. Snapchat. Social media has proliferated throughout society over the past decade and its mediums continue to grow. The social media craze is a large part of people’s daily lives and has expanded into the workplace, which can become a problem for the religious institute, as an employer. We will discuss various social media issues that can arise in the workplace, how religious institutes can manage and react to negative social media exposure, how social media in the workplace should be managed, the legal implications of limiting or monitoring employee social media use, what social media policies are available that a religious institute can implement and when it is recommended to take disciplinary action with regards to an employee’s use of social media.

   Facilitating healthy transitions to retirement can be daunting, but it is critical for the health and happiness of all community members. As leaders, being intentional about planning for the “third act” can help ensure long-term quality of life and mental and physical wellness for your members. Rev. David Songy, O.F.M.Cap., S.T.D., Psy.D., offers strategies to begin preparing for a full and healthy life after the end of traditional active ministry.

10:30 AM

**BREAK IN EXHIBIT HALL**

11:00 AM – 12:30 PM

**SESSION 2 – GENERAL SESSION ANNUAL UPDATE: IMPORTANT ISSUES FOR RELIGIOUS INSTITUTES AND THEIR SPONSORED MINISTRIES**

**Donna Miller – Legal; Sr. Sharon Euart, RSM – RCRI; NRRO**

This session will present updates on issues and topics that have arisen in the past year, including some of the current and emerging legal issues affecting religious institutes. This session will also include an update from NRRO as well as RCRI on their activities.

12:30 PM – 2:00 PM

**CORT LUNCH BUFFET**

2:00 PM – 3:30 PM

**SESSION 3**

7. **Behaviors of a well-functioning Investment Committee** – Joseph Matthews

   Studies show investor biases and predispositions often are among the primary reasons for poor investment performance. Committee members applying their own investment experiences and beliefs to decisions about your organization’s portfolio can decrease the probability of successful outcomes. By gaining a better understanding of behavioral finance, committee members will be better prepared to implement successful strategies that are definable and repeatable.

8. **The Importance of Cost of Care for Retirement Planning** – Sr. Hertha Longo, CSA & Matt Wade

   An accurate weighted average cost of care is essential when forecasting future retirement needs because it is a critical determinant of the Past Service Liability. This workshop will address how cost of care is calculated using the NRRO worksheets; how the cost and weighted average are used by NRRO and by TRENDS to calculate the past service liability; significant factors that can influence and change the cost of care; and the relationship between cost of care and cash flow in TRENDS.

9. **Transitioning Sponsorship** – Sr. Amy Hereford, CSJ

   This workshop will explore the sponsorship relationship through which communities carry out the mission of Jesus. It will discuss transitioning sponsorship and some new models of sponsorship based on **missio**
and communio, rather than strict legal control. It will discuss the careful planning necessary to meet the requirements of civil and canon law. The actual practice of the institute and the ministry corporation must provide the mechanism to enable the ministry to continue to flourish.


The Federal Group Exemption is the principal mechanism for religious institutes to obtain tax exempt status. But how does it really work? This session will explain the facts and functions of the Group Exemption and – using interactive case studies – try to answer some of the esoteric questions and address some of the common misunderstandings that may confront religious communities in dealing with the Group Exemption. Ample time will be reserved to address questions by participants.

11. Building Your Own Decision Tree for Evaluating Facilities – Lynn Daly, Shane Larson & Julia Walsh

Each community is faced with unique challenges specific to the ever-changing reality of balancing ministry needs, retirement needs, financial status, facility and property status and condition and member involvement. This session will focus on facility and property challenges and how they interact with other needs. The presenters will guide the participants on a decision tree analysis journey that will be enhanced using case studies from other religious institutes. Participants will hear from some of the case study institutes.

3:30 PM
BREAK IN EXHIBIT HALL
4:00 PM – 5:30 PM

SESSION 4


The question that every religious institute will face, is not what will the institute do if it has a data breach, but what it will do when a breach occurs? Sony. The IRS. CVS. Target. Home Depot. Like any organization, the religious institute is a target for cyber attacks. Any cyber breach could result in the theft of the institute’s valuable information, or the loss of confidential information belonging to its employees, donors, or those it serves, not to mention the considerable costs associated with responding to these issues. We will discuss what a religious institute can do to protect itself from cyber attacks, potential liability arising out of an attack, evolving statutory requirements for cyber security, policies and procedures, rapid response, and insurance coverage.

Older adult drivers contribute many positive qualities in daily driving but many experience physical changes which could put them and others at risk. This workshop will feature proven strategies, practical issues and real-world takeaways to help your Religious Institute reduce the risks and costs of an aging driver pool. Other topics include maintaining member independence, fleet policy, economic and cost-saving opportunities, culture and communication, driver awareness training, testing and monitoring, maintaining your fleet, Religious Communities’ experience and the change management that makes it all work.

14. **Positive Investing in the Year of Mercy** – Geeta Aiyer, Mark Kuhn & Karen Watson

Pope Francis’ Encyclical linking climate change and poverty and his Year of Mercy underpin the vital role of religious communities to promote the common good, while the USCCB Guidelines acknowledge the imperative to be responsible financial stewards. This panel will explore how to incorporate positive investment strategies in manager selection and evaluation, define positive social investment criteria, and discuss the impact of shareowner engagement. Speakers will share perspectives on partnering to achieve this joint vision.

15. **See how they love one another!?** – Sr. Mary Ellen Merrick, IHM

Individuals who have grown up in family systems that caused them to adopt protective roles and rules learned to survive but not thrive. They can be assisted in understanding that they have choices not afforded them as children. Until this awareness and possible transformation happens, problems can and do rise when these women and men attempt to form healthy adult relationships in community and ministry. They become “difficult people” and end up being unhappy and the source of others’ distress as well.

16. **Important Ages: what you need to know about Social Security** – Jeffrey Rodriguez

Do not miss this opportunity to have your Social Security questions answered. Jeffrey Rodriguez, Orange County Public Affairs Specialist with the Social Security Administration, leads this informative session.

Many people associate Social Security with retirement benefits and although this is true, it provides other benefits as well. Topics discussed include timing of your benefit, calculation of your benefit, payment to beneficiaries, and many more. It will be the best investment you have made in yourself!
17. Wayfinding in an Era of Completion – Ray Mattes, IHM

Relinquishment of members, places and ministry endeavors serve as reminders of a community’s finitude and may allude to the possibility of historical completion of institutional identity. Ambiguities around direction, decision-making and monitoring change may reveal unnamed aspects of communal grief and loss. This workshop proposes a pastoral framework through which institutes may view their completion journey. Emphasis will be placed upon the importance of naming current circumstances, honoring shared values and recognizing the interplay between the community’s deep story and its contemporary reality.

FREE EVENING

THURSDAY, OCTOBER 13

7:30 AM

BREAKFAST/EXHIBIT HALL

8:30 AM

PRAYER

9:00 AM – 10:30 AM

SESSION 5

18. Real Estate Review – Mary Reichert

The program will begin with an explanation of why a congregation should review its real estate portfolio. The metric for the review will be a cost/benefit analysis. Assuming a sale of some or substantial all of its real estate portfolio makes sense, the program will then focus on strategic considerations to guide a congregational leadership team and its finance officers on how to decide which real estate to sell and how to sell it. The program will (i) present how to most effectively use real estate consultants to evaluate a real estate portfolio with an expectation of engaging in a “one-off” sale of individual parcels (ii) how to engage a real estate broker to sell multiple parcels of a real estate portfolio which is geographically diverse and (iii) how to organize a sale of a substantial part of a congregation’s real estate holdings to a real estate investment trust called an REIT.

19. Religious Workers: Going from R-1 Visa to Green Card – Nicole Bonjean & Minyoung Ohm

This workshop will focus on how religious communities in the U.S. can sponsor foreign-born religious for permanent residence (green card) after they have come to the U.S. with an R-1 religious worker visa. The workshop will discuss the process of applying for permanent residence for religious workers, tips on how to maintain R-1 status to preserve eligibility for permanent residence, responsibilities of U.S. sponsors, and the non-minister sunset provision.
20. Effectively sharing your financial information with your stakeholders – Laurie Horvath, Ellen Labita, Krista Pankop & Brian Sanvidge

The nuances to sharing financial information for religious institutions are difficult even for the most experienced finance professionals. To be effective, a financial presentation needs to go beyond the numbers and deliver the important fiscal details so that every member of your audience stays engaged and informed. This workshop will prepare finance officers on how to share financial information with key stakeholders – governing boards, management, and donors. Our presentation would provide an inside look at Baker Tilly strategies that have been most successful for our clients.


This is the journey of the Sisters of the Most Holy Sacrament and the Marianites of Holy Cross—two Pontifical Right communities—into a Covenant Relationship with the appointment of a “Pontifical Commissary.” Presented from the perspective of the Congregational Leader (supreme moderator) and the canonical consultant working with the two communities, we will share the human and legal facets of this relationship led by the Spirit and guided by Canon Law into a governance structure that is a true blessing.

22. When Should A Congregation Outsource Finance And Accounting Services? – Phil Capps and Kate Ward

This workshop will explore religious community Finance Office challenges of decreased resources for qualified personnel, decreased availability of qualified personnel, and/or increased duties of Finance personnel because of decreased resources elsewhere. The speakers will provide guidance on Finance Office roles, their importance to the community, and the possibility of outsourcing the functions to consultants or public accounting firms. Case studies will provide insights into the decision-making process and the outcomes of outsourcing.

23. Find Secure Footing on Unstable Ground: Navigate your way through the unchartered territory of the Patient Protection and Affordable Care Act (PPACA) – Sr. Geraldine Hoyler, CSC

The Patient Protection and Affordable Care Act (PPACA) is a complex piece of legislation with constantly changing requirements. The implications this legislation has on Religious Institutes and their members can be particularly confusing. This seminar is focused on discussing the requirements and options under the Affordable Care Act to those under 65, and will address
basic decisions and processes that Religious Institutes might consider. There will also be a “how to” discussion which will help members garner a basic understanding of what options are available to them.

24. Canon And Civil Law Issues Facing Religious Institutes –
Rev. Francis Morrisey, OMI

There are numerous practical issues facing religious leaders to-day. In some institutes, these revolve around the completion of an institute’s mission and life; in others, they concern the transfer of sponsorship of apostolic works to other entities. In a number of instances, civil law requirements have been raising new challenges. There are also significant issues relating to the acceptance of new candidates into religious life (previous marriage, student debts, citizenship issues, and so forth). A certain number of these points will be considered in this workshop.

25. How to discuss investing with values with your consultant/managers –
Sr. Sandra Delgado, OP, Sonia Kowal & Bryan Pini

This workshop will give participants the tools to talk to their managers, consultants and the members of their internal advisory committees about their expectations for investing with values. We will discuss different options in terms of screens, advocacy, and integration of social or environmental justice concerns into investments. We will also discuss questions to ask to ensure meaningful integration and reporting as well as how to push back if a manager or committee member is dismissive.


Learn about new approaches to corporate structuring and nonprofit governance that can help your institute effectively advance its mission while minimizing legal risks and governance headaches. The program will provide an introduction to various types of legal entities, including limited liability companies, that institutes are using now to structure their ministries and protect their assets; governance options available under state law that religious institutes may use to preserve the charism of their ministries while expanding leadership to include more lay people or entering into covenant relationships with other communities; and creative ways that religious institutes can use reserved powers and membership structures to maintain control of sponsored ministries.

27. Supporting Our Members Living with Dementia – Sr. Paula Cooney, IHM

The possibility that some form of dementia, particularly Alzheimer’s Disease will be experienced by some members of our congregations is of concern to many. What are the signs that it isn’t normal aging? How do we have the difficult conversation? Are there ways of supporting the person in a local community and when do we know that an appropriately structured environment is needed? This session will address ways of responding to these questions in our various roles as leaders and companions in community.
12:30 PM – 2:00 PM

LUNCH ON YOUR OWN

2:00 PM – 3:30 PM

SESSION 7

28. How do I deal with My Problem Employees? – Mary Kessler

Some managers have employees who just aren’t performing up to their expectations. They may let poor performance slide without dealing with the problem directly. It may be an employee who constantly arrives late, can’t meet performance expectations or has a personality that alienates others. These problems damage productivity and even the Congregation’s reputation. This workshop will assist in identifying problem behaviors and discuss realistic solutions while ensuring the consistent and fair treatment of all employees.

29. ASSETS IN ACTION: How Three Catholic Institutions Use Their Assets to Act on Climate Change – Investments to Counter Climate Change – George Hanley, Nora Nash, John O’Shaughnessy and Ryan Strode

Just prior to the Pope Francis’ release of LAUDATO SI, Arabella Advisors released ASSETS IN ACTION: How Catholic Institutions Are Using Their Investments to Counter Climate Change. Profiled in this report are three Catholic institutions and how each is using their mission-aligned assets in innovative ways to act on climate change. The Arabella director who headed the project will moderate a panel discussion that includes a representative from each of the three Catholic institutions.


Like Alice, who had a good deal of trouble making any sense of Wonderland, many people find Accountingland to be a strange and non-sensical place. This workshop will attempt to help you make sense of financial reports. The focus will be on the conceptual framework that serves as the underpinning of financial reporting. As well, the concept of internal control and the role of the auditor will be briefly explored. By examining the objectives, assumptions and principles behind financial reporting, attendees should leave the workshop with a better understanding of the information, including its deficiencies, contained in financial reports.

31. Leaving a Legacy with Land Trusts – Pat Del Ponte, Sr. Ginger Downey & Jason Kissel

How can you actualize care of the earth values and leave a legacy for future generations? Land trusts can be a vehicle to preserve your land in perpetuity for generations that follow. Our panel will discuss how these values tie to Pope Francis’s Laudto si’ and steps you can take to determine whether land trusts are a viable opportunity. Case studies of religious congregations who engaged in thoughtful planning and discernment processes will be shared.
32. What leaders need to know about person-centered home health care for elder members – Rev. James Greenfield, OSFS & Sr. Catherine Howard, OP

Religious leaders must deal with the ongoing provision of long term health care for their retired members while preserving their financial resources. This workshop will highlight the guiding principles and best practices used by two community leaders in the process of instituting home health care that is person-centered for their elder members. What leaders need to focus on, communicate to their members, and face head-on the process of balancing finances with quality of life issues will guide the presenters in this workshop.

33. The Future of Consecrated Life – Rev. Henry (Hank) Lemoncelli, OMI

During this workshop Fr. Lemoncelli will share some insights gleaned throughout his nearly seventeen years of working at the Vatican Congregation for Institutes of Consecrated Life and Societies of Apostolic Life. Fr. will also share his hopes for the future of Consecrated Life and offer an opportunity for shared reflections.

BREAT

3:45 PM – 5:15 PM

SESSION 8

34. Mission and Charism, Today and Tomorrow: How Do I Know Which is Which? – Sr. Carol Zinn, SSJ

A discussion on how leaders move from being overly involved in the management of administrative and operational responsibilities to understanding and leading the conversation about sustaining the mission/charism. The presentation will also include engaging all members in living the mission regardless of age, health status and residence. This is context for moving the institute forward during this time of transition in the expression of religious life. There will be opportunity for dialogue to discuss the implications and challenges in contemplating the future of religious life.

35. Achieving Positive ESG Impact with Market Rate Fixed Income Investments – Cheryl Smith, Ph.D.

The Social Impact Bond market is developing rapidly with issuers that include both municipalities and corporations. Using the Total Portfolio Activation framework, investors will learn how to increase their positive Environmental, Social and Governance (ESG) impact with fixed income holding by re-allocating funds into municipal and corporate bonds or bond funds that finance projects with positive social or environmental impacts that align with their values.

For Religious Institutes, investments and property typically constituting the majority of value. More than ever, Leaders need to ensure decisions around these assets are integrated with overall strategic planning. We will explore an integrated, holistic approach towards managing an institute’s financial assets to support community members and further mission. We will provide an overview of financial modeling tools which can complement information generated via TRENDS, and link organizational goals with investment policy and real estate. For investments, we will examine the areas in which Leadership should focus their time, outline a prudent, high-level process towards managing an investment portfolio that reflects the mission and objectives of the institute; identify which considerations should influence the crucial decision regarding Investment Policy; and how to undertake these activities with a holistic perspective. For real estate, we will discuss making property decisions from the context of – sustaining mission and charism and enhancing community life. We will address how real estate might be considered in an investment portfolio; how properties are used to advance the mission of the institute; and how it can enhance community life to enable members to remain in mission regardless of their location.


The number and scope of protected classes under federal and state laws continue to grow with modern developments in the law. However, federal laws grant special considerations to religious institutes in the employment arena in order to safeguard citizens’ First Amendment rights. This workshop will explore the benefits and pitfalls available to religious institutes and help them navigate the realm of employment law. Specifically, it will address the application of Title VII’s exemptions, including the general exemption for religious organizations, the exemption for educational facilities, and the ever-evolving “ministerial exception.” The scope of the exemptions and their qualifying characteristics by identifying scenarios where religious employers can or cannot make employment decisions based on an employee’s membership in a protected class will also be discussed.

38. The Power of Earth, Wind & Fire: Renewable Energy Options for Reducing Your Carbon Footprint – Mark Hanson & Sr. Rose Jochmann, OSF

For most communities, acting in a sustainable manner is who they are and the responsibility they shoulder. But many still ask, “Can we do more with our facilities to reduce our carbon footprint?” The quick answer is ‘yes’. Our session will explore various strategies available, including geothermal,
solar, and wind power, and discuss why a comprehensive approach is critical. You’ll hear from one community that explored options, created their ideal approach, and witnessed positive results.

5:30 PM

CONFERENCE LITURGY

CONFERENCE CLOSES/FREE EVENING

FRIDAY • OCTOBER 14

7:30 AM

GRAB AND GO BREAKFAST
Speakers

Michael A. Airdo is a founding Member of Kopon Airdo, LLC. His practice focuses on the handling of complex civil litigation matters, including litigation involving religious institutions and other not-for-profit entities. He has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. He received his undergraduate degree, summa cum laude, and his law degree, with honors, from DePaul University. Kopon Airdo, LLC, currently serves as National Coordinating Counsel for the Christian Brothers Risk Pooling Trust, a coverage provider limited to serving Catholic religious orders and institutions across the United States.

Geeta Aiyer, CFA, Founder & President, Boston Common Asset Management; is Founder and President of Boston Common Asset Management (2003). Her training combines over 25 years of experience in finance with passion for the environment and social justice. Under her leadership, Boston Common has built a strong investment record and substantially improved the policies and practices of portfolio companies through shareowner engagement. Ms. Aiyer founded Walden Capital Management (1994), and non-profit, Direct Action for Women Now (DAWN) Worldwide. She received her MBA from Harvard University and degrees from the University of Delhi, India.

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

Fr. Charles J. Benoit, O.S.B., J.C.L., is a monk of Saint Joseph Abbey (Louisiana) and currently pastor of Saint Benedict Catholic Church in Covington, Louisiana. He has served in many positions in his monastery and Saint Joseph Seminary College, including Sub-Prior, Academic Dean, Dean of Students, and Vice-Rector. He holds a Canon Law degree from the Catholic University of America. During his studies he completed a summer internship at RCRI. He has assisted many institutes of consecrated life throughout the country, and is the canonical consultant to the Marianites of Holy Cross and the Sisters of the Most Holy Sacrament and assisted in forming their covenant relationship.

Adam Berger – Partner and Vice President Doering Fleet Management. Adam Berger is a 13-year veteran educator teaching best practices in the fleet management industry, specifically working with religious communities nationwide. He is a regular speaker at auto industry conferences, writer and the creative force behind Doering Fleet Management’s service offerings including the newly announced Fleet Wellness Index(R) and consultative approach to creating custom solutions developed after listening to the specific needs of each religious community. Prior, Adam worked at PricewaterhouseCoopers as a consultant to Fortune 500 companies in the auto and equipment fleet management areas.

Nicole E. Bonjean, Esq. is a staff attorney at the Catholic Legal Immigration Network (CLINIC) in the Religious Immigration Services section, where she has been since 2013. Nicole graduated from the Catholic University of America, Columbus School of law and is a member of the Virginia State Bar. The Religious Immigration Services section of CLINIC specializes in serving Archdioceses, Dioceses, and Religious Communities in the United States in all of their religious worker immigration matters.
Phil Capps, CPA is a partner in the accounting firm of Kerber, Eck & Braeckel LLP, with 19 years of experience working with various nonprofit organizations. He has provided accounting, auditing, and review services to various men and women religious communities. In addition, Phil has provided merger, financial planning and accounting consulting services to religious communities. He has previously presented on accounting and financial management topics at RCRI. Phil also serves as committee member on the Illinois CPA Society nonprofit education task force.

Sr. Kelly Connors, pm, JCD, PhD – Kelly is a member of the Sisters of the Presentation of Mary, United States Province. She serves as canonical consultant to various dioceses and religious institutes, speaks nationally and internationally on Canon Law and Religious Life, and teaches graduate Canon Law courses at both St. Joseph College, ME, and St. Paul University, Ottawa. While covering the breadth of Religious Law, much Kelly’s work is in the area of Governance.

Sr. Paula Cooney, IHM is a member of the Sisters, Servants of the Immaculate Heart of Mary of Monroe, MI. Although she has been involved in a variety of ministries – education, parish, and prayer, it was during her time in Congregational Leadership that she found a call to work in a particular way with the Elders. Over the past 20 years she has taught spirituality of aging, developed person centered programs and established dementia support teams and environments in a religious retirement community. For the past 12 years Paula has been an Eldercare Consultation for the NRRO (National Religious Retirement Office). She presently resides in Monroe where she continues working with religious congregations through retreat work and workshops on quality of care and support for their members.

Lynn Daly is based in Chicago and has responsibility for managing BB&T’s Catholic and senior living relationships in the Midwest. She has more than 24 years of dedicated experience working exclusively with nonprofit organizations on their financing needs. Prior to joining BB&T Capital Markets, Ms. Daly spent eight years at Ziegler, spearheading the Catholic Initiative within Ziegler’s Senior Living Investment Banking practice. She provided various types of financing and advice to Catholic-sponsored ministries including senior living facilities, higher education, K-12 schools, social services organizations, dioceses and religious orders. Her work with Catholic sponsors and their ministries resulted in Ms. Daly and Ziegler being recognized by Support Our Aging Religious in the Fall of 2014 for ‘making a national impact on the lives of Women Religious.’

Sr. Sandra Delgado, OP Dominican Sister Grand Rapids, currently serves the Congregation in the elected position of Vicaress and canonical treasurer. This role includes chairing the Investment Advisory Committee which is charged with various tasks pertinent to managing investments. Their task must be accomplished within the parameters of Socially Responsible Investment Policies. Sr. Sandra is an educator who has taught high school, adult basic education, adult education teachers and adult faith formation. She has been a teacher in Catholic and public schools, a manager in the KY Dept. of Adult Education and Director of Hispanic Ministry for the Diocese of Lexington. She received her B.A. from Nazareth College, Kalamazoo, MI and her M.A. in Adult and Continuing Education from Michigan State University, East Lansing, MI.

Pat Del Ponte PE LEED® AP BD+C is Hoffman Planning, Design & Construction, Inc.’s Vice President of Planning. Pat has nearly 35 years of industry experience and has worked with more than 25 religious orders across the country. Pat takes a very hands-on approach to building trust and confidence with clients when assisting them with their masterplanning and discernment efforts. An accomplished speaker and author, Pat has presented at past RCRI National Conferences and has been published in the RCRI Bulletin.

Sr. Rose M Dowling, FSM – Rose was President of the Franciscan Sisters of Mary, St. Louis, MO from 2007-2015. During that time the Congregation engaged in
constant change as they continued to move towards completion. Along with two other members of the FSM Leadership Team, Rose has written an account of their experience. Creating a new model for Governance was a major part of their journey. Rose continues her ministry as a spiritual director and an organizational facilitator.

Sr. Ginger Downey, OLVM is in her second term on the Leadership Team for the Our Lady of Victory Missionary Sisters, serving as general secretary. She is the chair for the LCWR Region VII and a member of the national LCWR board. Sr. Ginger earned her Bachelor’s in Sociology from the University of Wyoming and a Master of Theology degree in Liturgical Studies from St. John’s University in Collegeville, Minnesota. She has worked as Community Vocation Director as well as serving as parish Director of Religious Education, Director of Liturgy, Pastoral Associate and served as Director of the Office of Worship for the Diocese of Phoenix. Sr. Ginger has published articles and given workshops on liturgy and liturgical spirituality.

Tom Drez is the Chief Information Officer (CIO)/Chief Privacy Officer/Chief Security Officer/Managing Director Information & Technology Services (ITS), for Christian Brothers Services. Tom Drez is the managing director of Christian Brothers Services’ Information & Technology division. He is also the chief information officer, chief privacy officer and chief security officer for Christian Brothers Services. As the leader of the Information & Technology Services division for the last 28 years, he manages the portfolio of business and technology initiatives across all business units and all systems. In addition, he is responsible for information protection for the entire organization. Mr. Drez holds a bachelor’s degree in computer science from Lewis University, Romeoville, Illinois, and the designation of Certified Information Privacy Professional (CIPP) from the International Association of Privacy Professionals.

Erin George has assisted religious communities, not-for-profit organizations and senior living providers in a variety of ways including: strategic planning; planning for retirement needs and related physical environments; understanding demographic implications; assessing human, financial, property, and ministry resources; integrating the various elements of property, investments, ministries, and services to elder members into a cohesive plan for the future.

Kellie Goines – Partner – Not-for-Profit Services Group; Plante & Moran, PLLC. Kellie has more than 15 years of experience, serving over 100 not-for-profit and religious organizations in accounting, auditing, tax and management consulting. She is a member of the Firm’s professional standards department, with responsibility for providing quality control reviews of not-for-profit financial statements. She has consulted with various not-for-profit organizations with respect to implementation of new auditing and accounting standards. Kellie serves as a firm-wide technical resource to engagement teams to resolve auditing and accounting issues within the not-for-profit industry group. Kellie coordinates, and is a presenter at, internal and external not-for-profit technical trainings.

Rev. James J. Greenfield, OSFS is the provincial of the eastern province of the Oblates of St. Francis de Sales and just completed a three year term, August 2015, as president of CMSM. He has taught on the graduate level and holds a Ph.D. in Human Development, in addition to an M.Div.in Theology. He was the formation director for his community prior to his election as provincial. Among his ministerial responsibilities as provincial, Jim values the interaction he has with the senior members of his community and the opportunity to engage them in person-centered care and at-home retirement in place.

Jerry Gumbleton has assisted numerous religious communities, health care and not-for-profit organizations in identifying their long-term direction and priorities. That process typically focuses on defining organizational vision, mission and charism; identifying goals and objectives; determining how property, investments, and other resources can be used to support mission and community life.
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George Hanley – University of Dayton and the Hanley Foundation. George is an entrepreneur, investor and philanthropist. Currently, he is the Founder and Manager of TFH Partners, a private investment firm focused on emerging technology, real estate and sustainable food companies, and also a Principle of R2 Companies. As founder of the Hanley Group he spent more than 40 years in the trading business. Along with his wife Amanda, he is the Co-Founder and a Director of the Hanley Foundation, created to advance transformative educational, environmental and empowerment solutions. George is a graduate of the University of Dayton, where he serves as a Trustee and Chair of the Investment Committee. There, he established the Hanley Trading Center, launched the Hanley Sustainability Institute and took part in the board’s decision to divest fossil fuels from the school’s endowment.

Mark Hanson PhD LEED® AP BD+C is Hoffman Planning, Design & Construction, Inc.’s Director of Sustainable Services where his focus is on integrated design and project delivery, daylighting and lighting design, coordination of energy modeling and commissioning, HVAC systems review, renewable energy, and monitoring and verification. With more than 30 years of industry experience, Mark has worked with 14 religious orders across the country. Mark received his Bachelor of Arts in Economics from Harvard and his Masters in Water Resource Management, as well as his Doctorate in Environmental Studies, from the University of Wisconsin-Madison. An accomplished speaker and author, Mark has presented at numerous energy summits and sustainability conferences and has been published multiple times, including in the RCRI Bulletin.

Jeff Harrison, CSP, ARM – Risk Control Coordinator, Christian Brothers Risk Management Services. Jeff Harrison is the risk control coordinator for Risk Management Services at Christian Brothers Services. Jeff develops online and field risk reduction programs and coordinates risk control services for over 1,100 members nationwide. He has more than 20 years of experience in the field of risk management and has been with Christian Brothers Services for over 18 years. Jeff has obtained Certified Safety Professional (CSP) and Associate in Risk Management (ARM) designations and is currently a member of the American Society of Safety Engineers.

Sr. Amy Hereford, CSJ, JD, JCD is a Sister of St. Joseph. She has been in religious life for over 30 years and has served in a variety of ministries, in education, in administration and in communication. An attorney and canonist, she has degrees in science, communication and theology, as well as doctorates in civil and canon law. This background helps her assist religious institutes with their legal needs, and assist those who are making important choices about the future of their institutes. Her primary ministry is assisting religious institutes and societies with their legal needs, and supporting them as they face an uncertain and changing future. She works with communities across the US and Canada, and beyond.

Laurie Horvath, CPA is a Partner with more than 20 years of public accounting experience and specializes in providing auditing and accounting services to not-for-profit clients. She is currently a member of the AICPA Not-for-Profit Expert Panel and holds the position of Vice Chair of the Women’s Initiative Strategic Task Force with the MACPA. Laurie received a BA from the University of Michigan, an MBA from Michigan State, and an Executive Education Certificate from Harvard Business School.

Sr. Catherine Howard, OP is the President of the Sisters of St. Dominic of Blauvelt, New York. She holds a PhD in Social Work and an MPA in Public Administration Science. She has been involved in the development of programs for persons who are without housing, mentally ill and HIV infected. She has also taught at the Masters and Doctoral levels. She has participated in numerous workshops and seminars around holistic care for persons in need. Sr. Catherine, in her current ministry, has placed the input of the Sisters in the congregation at the center of the planning and implementation processes.
Sr. Geraldine M. Hoyler, CSC, C.P.A.; Religious Institute Consultant, Christian Brothers Services. Geraldine Hoyler, CSC, has an extensive background in healthcare operations and finance, as well as other ministries. She has served as general councilor/general treasurer for the Sisters of the Holy Cross. Previously, she was senior vice president, finance and treasurer, Catholic Health Initiatives. Her prior positions included serving as president, Mercy Services Corporation, and as a healthcare consultant. She currently serves on the finance advisory groups of three religious institutes of women. She earned a BSBA in accounting and an MSBA from the University of Denver. She is a certified public accountant in Indiana, a member of the American Institute of Certified Public Accountants and a Fellow of the Healthcare Financial Management Association (HFMA).

Sr. Rose Jochmann, OSF has been the Community Treasurer of the Sisters of St. Francis of the Holy Cross for more than 30 years. During her tenure, she has been part of various pivotal decisions related to her community including the initiation of a Capital Campaign, the building of a new Motherhouse, the financing of the new Motherhouse with tax-exempt bonds, and the planning and coordination of the solar project at the Motherhouse. Sr. Rose has served as chairperson of WITRI, a member of the Wisconsin Corporate Responsibility Program, and a Board member and treasurer of LCWR. She obtained her BS from St. Norbert College in De Pere, Wisconsin, and her Masters of Science in Administration for non-profit organizations from the University of Notre Dame.

Mary Kessler – has over 35 years of human resource experience in Catholic Church workplaces. She has served as a diocesan human resources director, a national Catholic association consultant and as an independent contractor for various church employers across the country. In each of these roles, she has assisted religious congregations of both women and men, parish and arch/diocesan staffs, and priests in creating personnel systems grounded in Catholic social teaching on workplace justice.

Jason Kissel is the Executive Director for ACRES Land Trust, a position he has held since 2006. Previously Jason was the Administrator for the Indianapolis Parks Department and the Curator of Trees for NC Zoological Park. Jason received his Bachelor of Science in Forestry from Purdue University. Jason has worked with several religious orders throughout the Midwest, assisting them with their land trust needs. Jason is currently pursuing a Master of Ministry degree from Bethel College in Indiana and has served as a church pianist since the age of 12.

William M. Klimon is a Member of Caplin & Drysdale’s Exempt Organizations Group in Washington, D.C. In the past decade, he has advised more than 600 charitable and other nonprofit organizations, including several dioceses and many prominent churches and other religious organizations across the nation on matters relating to corporate governance and transactions. He is the Co-Chair of the American Bar Association’s Joint Subcommittee on Nonprofit Corporate Governance.

Andrew Kopon, Jr., is a founding Member of Kopon Airdo, LLC. His practice focuses on the handling of complex civil litigation matters. He has tried high profile cases and successfully argued before the Illinois Supreme Court. He serves on the faculty of the prestigious IADC Trial Academy and Illinois’ defense bar association’s trial advocacy program. He is a charter member of the Leading Lawyers Network Advisory Board. He has been named an Illinois Super Lawyer on multiple occasions. He serves on the Board of Directors for the International Association of Defense Counsel and the Board of Trustees for Loyola Academy, Wilmette, Illinois. He received his undergraduate degree from Providence College and is a graduate, with distinction, from The John Marshall Law School.

Sonia Kowal – President & Director of Socially Responsible Investing. She manages environmental, social, and governance research, proxy voting, as well as the corporate engagement strategies of the firm. She also oversees the firm’s marketing, advisor, and
client relationships. Previously, Sonia headed Ethical Investment Research Services’ (EIRIS) US office in Boston where she was a Senior Research Analyst. She has also worked for over six years as a Portfolio Manager and Investment Research Analyst at Baillie Gifford in Scotland where she had responsibility for investments in Emerging Markets. Sonia holds a BS in Zoology from the University of Edinburgh and an MS in Investment Analysis from the University of Stirling, Scotland. She is an active member of US SIF (the Forum for Sustainable and Responsible Investment) as well as the Sustainable Investment Research Analyst Network and sits on the steering committee of USSIF’s International Working Group.

Mark Kuhn, Assistant Treasurer, Congregation of St. Joseph; has served the Sisters of St. Joseph community for more than 25 years. While he is currently the Assistant Treasurer for the Congregation of St. Joseph, he previously served as its Chief Investment Officer (2013-2016) and Chief Operating Officer (2007-2013). Prior to their merger in 2007, Mr. Kuhn was the Chief Operating Officer for the Sisters of St. Joseph of Wichita (1990-2007). He currently works out of the Congregation of St. Joseph Wichita, Kansas office. The Congregation of St. Joseph is comprised of seven independent congregations that joined to become one in 2007. The Congregation of St. Joseph has more than 500 sisters in ministry in the United States, Nicaragua, and Japan.

Sr. Ann Lacour, MSC is the Congregational Leader for the Marianites of the Holy Cross in New Orleans, LA. Prior to serving in congregation leadership roles, she served as Superintendent of Schools in the Diocese of Alexandria and Director of Development for the Archdiocese of New Orleans. Sr. Ann holds a BS from Our Lady of the Holy Cross and a MA in Theology from the University of St. Thomas. In 2014, Sr. Ann was appointed by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life to serve as “Pontifical Commissary” for the Sisters of the Most Blessed Sacrament.

Ellen Labita, CPA is a partner with more than 25 years of experience in public accounting, including multinational, national and regional firm experience, serving both the not-for-profit and for-profit sectors. She now concentrates exclusively on providing audit, tax, and consulting services for not-for-profit organizations, including OMB Circular A-133 and state reporting requirements. Ellen is currently Treasurer and Executive Board Member of the North Shore Child and Family Guidance. She received a Bachelor’s of Business Administration from Adelphi University.

Shane Larsen is a registered Architect at Schemmer and has been working with religious institutes across the United States for 7 years. He prides himself on open communication and leading large group brain-storming sessions. Shane enjoys leading groups of 100+ attendees while integrating audience participation. Mr. Larsen reinforces his belief that successful architecture should be defined by the needs and goals of the community. Currently Schemmer is working with religious institutes from Virginia to California and Texas to North Dakota. In 2015 Mr. Larsen presented the Workshop on understanding the difference between facility assessments, master planning, and full design. And how they all depend on each other.

Rev. Henry (Hank) Lemoncelli, OMI – Born in Peckville, PA and raised in Buffalo, NY Fr. Henry Lemoncelli, entered the Missionary Oblates of Mary Immaculate in 1968 and was ordained a priest in 1979. After several years as a Grammar and High School teacher and administrator, he became the Dean of Oblate College in Washington DC and the Eastern American Province Director of Formation, Father Lemoncelli also served on the Eastern American and then the United States Province Provincial Councils. Since November of 1999 he has worked in the Vatican Congregation for Institutes of Consecrate Life and Societies of Apostolic Life.

Sr. Hertha Longo, CSA – serves as General Treasurer of the Congregation of Sisters of St. Agnes, Fond du Lac, WI. She graduated from Marian University with a BSN in nursing; Fordham University with an MBA in
Finance; and holds a Masters’ and a Ph.D. in Economics from the University of Notre Dame. Hertha is an NRRO eldercare consultant and a TRENDS consultant and works with a number of religious institutes in the areas of eldercare and long range planning. She chaired the task force that developed the TRENDS forecasting model. Hertha is a former president of RCRİ's Board of Directors.

Bro. Larry Lundin, S.J., Joined the RCRI office in 2013, and is the Associate Director for Administration and Finance at RCRI. After joining the Jesuits in 1966, received a degree in accounting from the University of Louisiana at Lafayette, and a MBA from Loyola New Orleans. He worked in Jesuit community administration for many years including five years at the Jesuit Conference (National Office) in Washington. He completed 22 years as New Orleans Province treasurer in June 2012. He also served as a board member and secretary-treasurer for Our Lady of Wisdom Healthcare Center, a collaborative effort of 16 religious institutes in New Orleans.

Mark MacDougall has been a partner in the Washington, D.C. office of Akin Gump Strauss Hauer & Feld, LLP since 1994. A former federal prosecutor, Mark is a fellow of the American College of Trial Lawyers and for more than a decade has provided pro bono trial representation to indigent defendants facing the death penalty in South Carolina. For his work in this area, Mark received the 2014 John Paul Stevens Award from the American Bar Association. In addition to his trial work, Mark is a recognized authority on civil law as it relates to religious institutes. He is a regular speaker and contributor at programs sponsored by the Resource Center for Religious Institutes.

Ray Mattes, IHM, DMin, MSG, MPA, is a member of the Immaculate Heart Community of California. As a professional gerontologist, he specializes in holistic approaches to elderhood and the spirituality of later life. Ray has served as a consultant, spiritual director, retreat leader and facilitator to religious institutes, not-for-profit organizations and faith communities. Currently, he is the Administrator of Home Care for the Los Angeles Province of the Sisters of St. Joseph of Carondelet.

Joseph J. Matthews, CFA, CFP® – First Vice President – Financial Advisor, Senior Investment Management Consultant, Branch Manager. With over twenty five years of experience in the financial services industry, Joe assists investment committees with creating investment processes that are consistent with the fulfillment of their fiduciary responsibilities. As a Government Entity Specialist and Senior Investment Management Consultant, Joe is designated by Morgan Stanley to address the needs of public funds, municipalities, endowments, foundations and other institutional clients. Prior to joining Morgan Stanley, Joe was a branch manager and Sr. Vice President at Bank of America Merrill Lynch with a focus on institutional consulting. Additionally, he has been recognized by Institutional Investor magazine for his work with endowments and foundations and by On Wall Street magazine as a Top 100 Branch Manager in the United States.

Barbara J. McKenna, CFA – Ms. McKenna is Managing Principal, Portfolio Manager at Longfellow Investment Management, leading Intermediate and Core portfolio management and credit strategy. Prior to joining Longfellow, she was a director and senior portfolio manager at State Street Research. Previously, Ms. McKenna was a director and portfolio manager at Standish, Ayer & Wood and has held portfolio management and investment banking positions. Ms. McKenna has over 25 years of experience and holds a MS and BS in Finance from Boston College. She is a CFA charterholder and a member of the CFA Institute and Boston Security Analysts Society. She is also a board trustee of American Beacon Funds and a member of the N.E. Financial Services CEO Roundtable and the Federal Reserve Bank of Boston’s External Diversity Advisory Council.

Sr. Mary Ellen Merrick, IHM, is a sister from Sisters, Servants of the Immaculate Heart of Mary in Scranton, PA. She is currently serving at Guest House, Inc. as
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the Executive Director of the Women’s Program since 2010. Sr. Mary Ellen holds a Bachelor of Secondary Education and English Major from Marywood University; a master’s degree in Reading Specialist from Marywood University; a master’s degree in Clinical Pastoral Counseling from Loyola University in Maryland; A Certificate of Advanced Study from Loyola University in Maryland and a Doctor of Ministry from Loyola University in Maryland & The Graduate Theological Union (Donaldson, IN). She also holds certifications in Master Addiction Counselor - National; Approved Clinical Supervisor – National; and Certified Advanced Alcohol and Drug Counselor – Michigan.

Donna Miller, JD, JCL, is the Associate Director for Civil Law at the Resource Center for Religious Institutes. Donna received her BS in education from Brescia College in Owensboro, Kentucky. She taught in Catholic elementary schools before earning her law degree from the Catholic University of America. After practicing law in a civil law firm and as a criminal prosecutor, Donna earned her canon law degree from St. Paul University in Ottawa. She then served as a judge in the Owensboro Marriage Tribunal, as a diocesan canonical advisor, and as Diocesan Coordinator for the Office for Safe Environment. Since coming to RCRI, Donna has focused on various aspects of public benefits, taxes, powers of attorney, and policy review.

Rev. Francis G. Morrisey, OMI – Born in Charlottetown, PEI, Canada, February 13, 1936; ordained to the priesthood for the Missionary Oblates of Mary Immaculate, September 23, 1961. Professor of Canon Law, Saint Paul University, Ottawa, Canada. Actively involved through the years in various Vatican commissions, as well as in the Church’s marriage courts. Also involved with many religious institutes in revising constitutions, in preparing for their completion, and in addressing current issues. Writer of some 400 publications relating to Catholic healthcare, issues concerning religious life, diocesan organization, and temporal goods; invited speaker in some 50 countries.

Sr. Nora Nash, OSF, Sisters of St. Francis of Philadelphia. Nora Nash is a Sister of St. Francis of Philadelphia and is the Director of Corporate Social Responsibility for her congregation. She is an active member of the Philadelphia Coalition for Responsible Investment as well as the Interfaith Center on Corporate Responsibility (ICCR). She currently manages the congregations’ assets in Community Development Loans, and Social Justice Grants. She has overseen the “fossil fuel divestment” from the OSF portfolio while holding sufficient shares to be an active shareholder advocate. She also does presentations at local universities and communities on various dimensions of justice and advocacy, especially communities affected by all aspects of fossil fuel development. She has been recognized internationally for her shareholder advocacy work.

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

Minyoung Ohm, Esq. is a staff attorney at the Catholic Legal Immigration Network (CLINIC) in the Religious Immigration Services section and has been serving Dioceses and Religious Communities in their religious immigration matters since 2008. Prior to joining CLINIC, she was an associate attorney at Carliner & Remes and practiced immigration law in a variety of areas, including asylum, family-based visa petitions, and business immigration matters. She also worked as an intern at Tahirih Justice Center handling Violence
Against Women Act (VAWA) cases and served as a student advocate with the American University’s Domestic Violence Clinic. She is a member of the New York State Bar.

**John O’Shaughnnessy**, Franciscan Sisters of Mary
With the Franciscan Sisters of Mary for 24 years, John serves as their Chief Executive Officer and CFO, and is CFO for some of FSM’s affiliate organizations. Since 2001 he has also served as financial consultant to several Catholic religious congregations. John seeded, cultivated and now oversees FSM’s $10 million impact investment program. He also planned and implemented FSM’s “fossil fuel divestment” strategy in 2014. With others John formed the November Group, a collection of investment professionals and Catholic asset owners whose active mission is, “Through sharing our relatable experiences and learning we expand Impact Investing among Catholic organizations.” He is a licensed CPA and a former Registered Investment Advisor.

**Krista Pankop, CPA** is a Partner with 20 years of experience in assisting not-for-profit and religious organizations with their audit, accounting, and consulting needs. She has the role of Not-for-Profit Risk Leader for all of Baker Tilly. In addition, Krista has authored various articles with industry publications on issues affecting not-for-profits and has served as a Board member for several not-for-profits. Krista has a BA in Accounting from the University of Wisconsin.

**Bryan J. Pini, CFA** is the president and chief investment officer of Mercy Investment Services, the socially responsible investment program for the Sisters of Mercy and its ministries. Mercy Investment Services works for systemic change in our community, nation and world in the areas of non-violence, racism, environment, concern for women, and immigration through corporate engagement, proxy voting, portfolio screening and impact investing. Prior to joining the organization in 2007, Bryan was the treasurer and chief investment officer of Saint Louis University. Previously, he served as the director of finance and administration for the Jewish Federation of St. Louis and the director of treasury services for Sisters of Mercy Health System. Bryan holds a bachelor of science degree in accounting from Bradley University and a master of business administration degree in finance from Washington University. He is a Chartered Financial Analyst and a member of numerous professional and community organizations.

**Mary Reichert** is a tax partner at the international law firm Bryan Cave, LLP. Her practice areas include municipal finance, tax-exempt organizations and specialized employee benefit matters including government pension plans and employee stock ownership plans. Her tax exempt corporate reorganization practice includes serving as lead counsel in the reorganization of numerous religious congregations. She also served as lead tax counsel for the Conrad N. Hilton Fund for Sisters. Ms. Reichert has completed numerous courses in canon law, studying at Aquinas Institute, St. Louis and at Saint Paul University, Ottawa. She is a member of the National Association of Bond Lawyers (“NABL”) and is a frequent panelist at NABL workshops on public finance, including tax enforcement panels and ethics presentations. Ms. Reichert has worked with the Securities & Exchange Commission to obtain a “no action” letter that the charitable pooled investment fund sponsored by the Sisters of Mercy of the Americas was exempt from registration under the federal securities laws.

**Jeffrey Rodriguez** – Orange County Public Affairs Specialist. Jeffrey has been with Social Security Administration for over six years; serving the public as a Claims Representative, and for the last year in the Public Affairs position. He served as a Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) trainer for the field office claims representative unit. He was the specialist assigned to Medicare Non-Utilization Project for the Field Office. Jeffrey also was part of the South Coast Area Representative Payee Review Task Force. Jeffrey is a member of the San Francisco Region Management Association, as well as the Hispanic Affairs Advisory Council. He recently completed a Master’s Degree in Leadership and Organizational
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Studies. Before coming on board with Social Security Jeffrey worked for the County of San Diego Health and Human Services. He was responsible for pending Disability Medi-Cal claims in the North Coastal Family Resource Center.

Brian Sanvidge, CIG, CFE is a certified inspector general and is the partner-in-charge of the business fraud and investigations team in the New York regional offices of Baker Tilly. He has been an inspector general for twelve years, ten of which for the New York State Labor Department. In that capacity, he oversaw the civil and criminal investigations conducted by the Department of Labor. Brian received a BA from the State University of New York at Albany.

Cheryl Smith is a managing partner, economist, and investment manager at Trillium Asset Management where she leads the fixed income management process. Cheryl began her investment career at Trillium in 1987. In 1992, she joined Walden Asset Management before rejoining the Trillium in 1997. Cheryl currently serves on the boards of Oikocredit USA and Cornerstone Capital and is a past Chair of US SIF. She recently served on the Board of Episcopal Divinity School. Cheryl is a Chartered Financial Analyst charterholder and a member of the CFA Institute. She is a member of the American Economic Association. Cheryl holds a B.S.F.S. degree from Georgetown University School of Foreign Service, and earned M.A., M. Phil., and Ph.D. degrees in Economics from Yale University.

President – Saint Luke Institute; Father Songy is a priest of the Capuchin Province of Mid-America and a clinical psychologist. Prior to coming to Saint Luke Institute, he was the spiritual director and prefect of studies at Redemptoris Mater Missionary Seminary in Denver, Colorado. He was director of counseling services at the Pontifical North American College in Rome and held several positions at St. John Vianney Theological Seminary. Fr. Songy holds a doctorate in psychology from the University of Denver and a doctorate in sacred theology from the Teresianum. He holds a master’s degree in pastoral counseling from Loyola College and theology degrees from Aquinas Institute. Fr. Songy presents internationally on topics such as formation in priestly celibacy, cybersex addiction and integration of psychological and spiritual treatment.

Dave Stahl has assisted congregations, foundations, endowments, and not for profit organizations with a variety of issues related to managing their investments in his role at Plante Moran Financial Advisors. He has provided assistance by bridging long-term cash flow planning into investment policy creation, implementation, and monitoring. He has provided education to leadership teams and boards on asset allocation strategy, and how to integrate financial modeling with investment decisions.

Ryan Strode – Arabella Advisors. Ryan is a Director in Arabella’s Chicago office, where he provides guidance to family and institutional clients on developing philanthropic strategies in the areas of sustainable agriculture and local food, climate change mitigation and adaptation, and clean water. Working alongside Eric Kessler to build the firm’s food system practice area, Ryan is currently leading a number of related projects, including the development and implementation of a regional food grant-making strategy for a new Midwest funder. Ryan is also working extensively on issues related to climate and the environment, including the development of a strategy to end energy poverty, supporting the fossil fuel divestment and reinvestment campaign, and managing a portfolio of grants dedicated to advancing an equitable global climate movement.

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

**Greg Walsh, C.A., M.B.A.** – Greg has served as Director of Finance of the Sisters of Charity, Halifax, Nova Scotia, for over twenty-six years. Prior to this, for fifteen years, he was a member of the accounting faculty in the School of Business at Saint Mary’s University in Halifax. He earned his C.A. designation while working with the predecessor firm of KPMG. Over the years, Greg has made numerous presentations to various groups.

Julia Walsh has been working exclusively with Catholic Religious Institutes since 1990. Her primary focus is Strategic Planning, particularly around facility issues and Financial Consulting. Her strengths are Financial Analysis, Project Planning, Communication and Consensus Building. She approaches each project as unique and understands that a Community’s buildings are more than bricks and mortar. Julia holds her undergraduate degree from Washington University in St. Louis in Finance and Economics and her MBA from University of Illinois in Business Management. The Stewardship Center is an independent Investment Consulting firm that works exclusively with Catholic Religious Institutes and their sponsored ministries. TSC’s consultants focus on tangible assets of the institute in light of member needs and concerns.

**Kate Ward, CPA** is a partner in the accounting firm of Kerber, Eck & Braeckel LLP, with 17 years of experience working with religious communities and their related ministries. Kate is a certified public accountant and holds a Bachelor of Science degree from Purdue University. She has assisted religious communities with audit and review services, financial reporting guidance, reconfiguration consulting and management consulting, including the comprehensive financial analysis of operations and strategic planning.

Karen Watson, CFA, AlF®, Chief Investment Officer, Congregation of St. Joseph (formerly with Arthur J. Gallagher); has been the Chief Investment Officer for the Congregation of St. Joseph since July 1, 2016. Prior to joining the Congregation of St. Joseph, Ms. Watson spent 13 years at Arthur J. Gallagher and provided investment consulting services to the firm’s religious clients. Her responsibilities included performance analysis, portfolio design and construction, and investment policy formation. Ms. Watson was also responsible for socially responsible screening for the firm. Ms. Watson is a member of the CFA Institute, the CFA Society of Pittsburgh, and the La Roche College Board of Trustees. Ms. Watson received her BS in Finance from The Pennsylvania State University and her MBA in Corporate Finance from the University of Dallas.

Brendan Wilson is a Member of Caplin & Drysdale’s Exempt Organizations Group in Washington, D.C. Mr. Wilson serves as principal legal counsel to several Catholic religious institutes and Catholic nonprofit organizations, as well as other tax-exempt organizations. Mr. Wilson is Chair of the Religious Organizations Subcommittee of the American Bar Association Business Law Section.

**Jeff Zeleji** – Associate – Not-for-Profit Services Group; Plante & Moran, PLLC. Jeff has over 6 years of experience with a primary focus in not-for-profit and religious organizations. His experience includes job management and organization, supervision and training of staff, and communication with clients. He has been exposed to complex investment portfolios and a variety of unique corporate structures within religious communities. Jeff is a member of Plante Moran’s professional standards team and presents at Plante Moran internal not-for-profit technical training programs.

**Sr. Carol Zinn, SSJ** – Senior Vice President - Mission Integration - a Sister of St. Joseph, has responsibility at Plante Moran for promoting mission integration within religious institutes. Her work focuses on broadening the understanding of charism and strengthening/
sustaining the mission and charism. She is a frequent speaker internationally and nationally on the future of the mission and charism. She recently concluded her service in the Presidency of LCWR (Leadership Conference of Women Religious) after completing her 3 year term, 2012-2015. She has served in a variety of leadership capacities throughout her religious life. This experience also includes serving on her Congregation’s leadership team. Sr. Carol has served as the main representative for the Congregations of St. Joseph, an NGO in General Consultative Status with the Economic and Social Council at the United Nations.
Registration Information

Conference Site
The 2016 RCRI National Conference (lodging and events) will be held at the
Anaheim Marriott
700 West Convention Way
Anaheim, California 92802
8101 World Center Drive
PHONE 714.750.8000
Your hotel room is NOT included in the conference registration fee.

Workshop and Meal Selections
Review the Conference Registration information and select the workshops and hospitality events you plan to attend. Your selection assists RCRI in providing adequate room assignments, hand-outs, 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 grab and go breakfast on Friday. Please carefully select which meals you will actually attend, as RCRI incurs the expense if you do not attend.

Conference Fee and Registration Dates
Please register using our on-line form available by Clicking Here! Registration is available through September 30, 2016 but save $50.00 by registering early!

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<td>Those who are not RCRI members</td>
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RCRI members include all members and employees of religious institutes with paid 2016 membership in RCRI, not only the named representative.

- RCRI must meet a minimum number of room reservations to benefit from complimentary meeting space. Thank you for your assistance in supporting conference space needs by rooming at the Anaheim Marriott

Cancellation Policy
- For written cancellations before September 1st, RCRI will refund the registration fee, less a $50 processing fee.
- Fifty percent (50%) of the registration fee will be refunded for cancellations made between September 2nd and September 30th.
- On or after October 1st, no refund will be made.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by registered attendee, naming his/her substitute.

Policy for Guests
There is a $130 charge for RCRI conference guests. Guests are welcome in the Exhibit Hall and all food functions if properly identified with a name badge. Guests are not permitted to attend workshops.

Hotel Reservations

Special Rates for RCRI Conference Attendees
The hotel rate of $149 for single and 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 specified rate, hotel reservations must be made by September 9, 2016. Direct reservations to the hotel will not be awarded at the RCRI discount rate.

All reservations must be made through the Nix Conference and Meeting Management online reservation system; Click Here! 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
Celebrating the JUBILEE YEAR OF MERCY

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.

Hotel Amenities
The Anaheim Marriott does have Wi-Fi available in rooms; High Speed $12.95 a day/Enhanced High Speed $16.95 per day (subject to change). In the Lobby and public areas: Complimentary Wireless.
The hotel has a full service business center and provides several on-site dining options. The hotel also has an extensive fitness center and an outdoor swimming pool open year round.

Airport & Transportation
The Anaheim Marriott is close to three area airports.
- John Wayne Airport – Orange County (SNA) 14 miles away.
- Long Beach Airport – (LGB) 18 miles away
- Los Angeles International Airport – (LAX) 35 miles away.

Shuttle Service
Will be posted on our website once it is available.

Discounted Disney Tickets
Tickets are valid from Thursday, October 06, 2016 to Monday, October 17, 2016.
Ticket store closes 9:00 PM PST on Monday, October 10, 2016.
Please Click Here to Purchase Tickets.
This link provides the opportunity for attendees to add to the magic of their meeting experience by purchasing specially-priced Disneyland® Resort Theme Park tickets prior to their arrival.

Mass/Prayer Service
Is provided daily in the conference center, please refer to the program for schedule and location.

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.

CORT Meetings
Tables will be provided for CORT’s who wish to gather during Wednesday’s lunch break.

Audio Tapes and Workshop Handouts
RCRI will provide audio and video taping of this year’s conference. An order form will be supplied at a later time.

Exhibitor Information

Event Sponsorship
RCRI is grateful to any organization that can 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 website Click Here! 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 2, 2016.