Celebrating The Year of Consecrated Life

CARIBE ROYALE • ORLANDO, FLORIDA

NATIONAL CONFERENCE • OCTOBER 27-30, 2015

WAKE UP THE WORLD!
2015 Year of Consecrated Life
Welcome to the 2015 Annual RCRI Conference!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, I extend a warm welcome to the 2015 annual conference. We look forward to an enjoyable, enriching and enthusiastic conference gathering in Orlando, Florida.

With the assistance of the 2015 Conference Planning Committee, we have developed a program covering topics many of you have suggested to us as well as workshops that we hope will assist you as you move forward to addressing the financial and legal issues related to planning for the future of your institutes.

The theme of this year’s conference is a celebration of the Year for Consecrated Life, a time during which Pope Francis calls us to “remember the past with gratitude, live the present with passion, and embrace the future with hope.” (Pope Francis “Apostolic Letter to All Consecrated People”). In describing the aims for the Year for Consecrated Life, Pope Francis proposes the same ones that Saint John Paul II offered to the entire Church at the beginning of the third millennium echoing his earlier message in the Post-Synodal Apostolic Exhortation Vita Consecrata: “You have not only a glorious history to remember and to recount, but also a great history still to be accomplished! Look to the future, where the Spirit is sending you in order to do even greater things” (n. 110).

Among the highlights of the 2015 conference will be the address by our keynote speaker, Most Reverend Joseph W. Tobin, C.Ss.R, Archbishop of Indianapolis and former Secretary of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life, on Tuesday evening, October 27. Prior to the opening, we will offer three pre-conference workshops on Tuesday, October 27: a half-day session on Impact Investment sponsored by Catholic Relief Services (CRS); an all-day session for new leaders and finance personnel 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.

In addition to some 35 workshops, we have scheduled a general session for the Legal Update including updates from RCRI and NRRO. On Thursday afternoon, October 29, a conference liturgy will be celebrated for all participants. Another highlight this year is the availability of CORT tables during the Friday morning hot breakfast, rather than during a lunch break. A welcomed addition for 2015 will be the availability of golf carts to transport those who wish to take advantage of the service during the conference.

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

Sr. Sharon Euart, RSM
Executive Director
CONFERENCE SCHEDULE

TUESDAY, OCTOBER 27

PRE-CONFERENCES

8:45 am – 4:30 pm

1 Introduction to Management of Religious Institutes: A Pre-Conference Workshop for New Leaders and Finance Personnel of Religious Institutes
   Speakers: Michael Airdo, Br. Larry Lundin, SJ & Donna Miller

9:00 am – 12:30 pm

2 Incorporating Impact Investing in Portfolio Construction – Patricia Dinneen & John Kohler

1:00 pm – 4:30 pm

3 TRENDS – Sr. Hertha Longo, CSA & Bro. Larry Lundin, SSJ

OPENING SESSION

5:30 pm Prayer and Welcome

6:00 pm Keynote Address – Signs and witnesses: The service of consecrated life to the People of God
   – Archbishop Joseph Tobin, C.Ss.R.

7:00 pm Opening Reception

WEDNESDAY, OCTOBER 28

7:00 am Eucharist

7:30 am Breakfast in Exhibit Hall

8:30 am Prayer

9:00 – 10:30 am SESSION 1

1 Investment Outsourcing: The Pros and Cons
   – James Modelski

2 Advanced Topics in Accounting
   – Kellie Goines & Sue Novak

3 Practical Guidelines for Completion in Religious Communities
   – Sr. Amy Hereford, CSJ

4 Strategic Planning for the Spirit Led
   – Dr. Marisa Guerin

5 Mission Advancement: The Key to Viability of Our Missions and Our Institutes
   – Sr. Georgette Lehmuth, OSF

10:30 am Break in Exhibit Hall

11:00 am – 12:30 pm SESSION 2

6 Investment Committees Decisions – Best Practices – Peg VanWagoner

   – Sr. Sharon Holland, IHM

8 Addictive Illness In Our Midst
   – Sr. Mary Ellen Merrick, IHM

9 Planning for Your Community’s Future Care Needs: Church Plan or Charitable Trust?
   – Mark MacDougall & Kristine Sendek-Smith

10 Cyber Security, Cyber Risk and Data Breaches, Oh My! – Tom Drez

12:30 pm – Buffet Lunch

2:00 – 3:45 pm SESSION 3

GENERAL SESSION

Annual Update: Important Issues for Religious Institutes and Their Sponsored Ministries
   – Donna Miller – Legal Update; Sr. Sharon Euart, RSM – GHR Grants; NRRO

3:45 pm Break in Exhibit Hall

4:00 – 5:30 pm SESSION 4

11 Catholic Religious Organizations and Solutions to Building an Impact Investing Portfolio
   – Laura Berry, Kathleen Hegenbart & Marina Hernandez
<table>
<thead>
<tr>
<th>Session</th>
<th>Title</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Understanding the Difference Between Facility Assessments, Master Planning, and Full Design.</td>
<td>Mark Higgins &amp; Shane Larsen</td>
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<td>And How They All Depend on Each Other</td>
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<td>13</td>
<td>Religious Institutes: Tales from the Crypt (when religious institutes merge)</td>
<td>Mark MacDougall</td>
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<td>14</td>
<td>Abuse Prevention, What Likely Helps: Myths and Opportunities</td>
<td>Prior Roman Paur, OSB</td>
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<td>15</td>
<td>The Top 5 Challenges &amp; Solutions for Managing Your Community's Transportation Needs</td>
<td>Tammy Cheever, Geof Fowler &amp; Gael Sopchak</td>
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Free Evening

**THURSDAY, OCTOBER 29**

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<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30 am</td>
<td>Breakfast in Exhibit Hall</td>
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<td>8:30 am</td>
<td>Prayer</td>
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<td>9:00 – 10:30 am</td>
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<td>Break in Exhibit Hall</td>
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<td>11:00 am – 12:30 pm</td>
<td>SESSION 6</td>
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<td>11</td>
<td>Franciscan Villa – A New Collaborative Model for Community Living</td>
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<tr>
<td>21</td>
<td>Human Trafficking – A Definitive Look at How Better Supply Chain Management Can Bring About a Safer World</td>
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<tr>
<td>22</td>
<td>Introduction to Alternative Investments for Religious Investors</td>
</tr>
<tr>
<td>23</td>
<td>Associates and Their Relationships to Religious Institutes: Gifts and Challenges</td>
</tr>
<tr>
<td>24</td>
<td>Structure, Strategy and Stewardship: How They Relate to Your Investment Portfolio</td>
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<tr>
<td>26</td>
<td>Food Security and the Role of Your Investment Portfolio</td>
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<tr>
<td>27</td>
<td>“Well Done, Good and Faithful Servants”: Moving Toward Completion</td>
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<tr>
<td>28</td>
<td>TRENDS for Experienced Users</td>
</tr>
<tr>
<td>29</td>
<td>Internal Controls 3.0: Assessing the Risk of Your Organization</td>
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<tr>
<td>30</td>
<td>Conference Liturgy</td>
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</tbody>
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**CONFERENCE SCHEDULE (continued)**
FRIDAY, OCTOBER 30

7:30 am  Breakfast in Exhibit Hall – CORT Tables

8:45 am  Prayer

9:00 – 10:30 am  SESSION 8

31  Aging: A Challenging Chapter – Behavior Topic
    – Sr. Dorothy Heiderscheit, OSF

32  Choosing To Be Pro-Active About The Future: The Reality Of Ecclesiastical Intervention In A Religious Institute Facing Decline
    – Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP

33  “Rebuild My House” A Small Franciscan Congregation Responds to the Call
    – Sr. Ellen Carr, OSF

34  Fraud Detection and Prevention
    – Sonia Himmelberg
TUESDAY, OCTOBER 27

PRE-CONFERENCE WORKSHOPS

1. INTRODUCTION TO MANAGEMENT OF RELIGIOUS INSTITUTES: A PRE-CONFERENCE WORKSHOP FOR NEW LEADERS AND FINANCE PERSONNEL OF RELIGIOUS INSTITUTES

   Speakers: Michael Airdo, Br. Larry Lundin, SJ & Donna Miller

   This Workshop is designed for new treasurers, finance personnel, new leadership councils and teams.

   The Workshop 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, civil and canon law language, materials that finance personnel should share with leadership, the legal relationship of members to the institute with regard to financial matters, risk management issues, and federal employment law.

   8:45 am – 4:30 pm

   Tuition: $250, Includes continental breakfast and lunch

2. INCORPORATING IMPACT INVESTING IN PORTFOLIO CONSTRUCTION

   – Patricia Dinneen & John Kohler

   Following an impact investing conference hosted at the Vatican, this workshop will provide resources to help decision-makers incorporate impact investing into their portfolios. Participants will learn the basics of finding, assessing, and measuring investments that are aligned to their mission and comply with their fiduciary responsibilities. Additional resources and trainings are highlighted for those interested in gaining further knowledge and practical skills to advocate for and lead the integration of impact investments into their portfolios.

   Time: 9:00 am – 12:30 pm

   Tuition: $100, Includes continental breakfast and lunch

MICHAEL AIRDOS area of practice focuses on complex civil matters, including premises liability, product liability, property damage litigation, and healthcare litigation. Through his work with CBS, he has broad experience in representing the unique legal needs of religious institutes and sponsored ministries. Mr. Airdo, JD, specializes in legal matters involving not-for-profit corporations, schools, colleges, universities, and mental health professionals.

BROTHER LARRY LUNDIN, S.J., is the Associate Director for Administration & Finance at RCRI. After joining the Jesuits in 1966, he 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.

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.
and the U. S. White House. Dr. Dinneen holds degrees from the University of Pennsylvania (B.A.), London School of Economics (M.Sc.) and MIT (Ph.D.). She is involved in multiple philanthropic and impact investing initiatives, including Board Member of Catholic Relief Services (CRS) and Co-Chair of the Impact Investing Advisory Committee.

JOHN KOHLER is the Executive Fellow and Director, Impact Capital Program, Miller Center for Social Entrepreneurship, Santa Clara University. John is a mentor to social entrepreneurs at the Global Social Benefit Accelerator. For the past 5 years, he has led the Investor Management Training for the Aspen Network of Development Entrepreneurs. He is Chairman and co-founder of Toniic, a syndication network of impact investors, and manages technology investments through Redleaf Venture Management, a venture capital operating company founded in 1993. John received his bachelor’s degree concentrating in international economics from UCLA and completed executive programs at Wharton and Stanford business schools.

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 RCRi’s Board of Directors.

Bio for Br. Larry Lundin, please see pre-conference 1.

OPENING SESSION
5:30 pm  Prayer and Welcome
6:00 pm  Keynote Address – Signs and witnesses: The service of consecrated life to the People of God

– Archbishop Joseph Tobin, C.Ss.R.

Pope Francis calls for the People of God to abandon any pretense of sterile self-absorption and, instead, focus its attention outward towards the proclamation of the Good News of God’s mercy with a special preference for those who live on the margins of Church and society. How will consecrated women and men contribute to the mission of the People of God?

This conference will examine the eschatological character of consecrated life, including the sign value of religious profession, which is a service to the People of God (Lumen Gentium 44). Consecrated people should have the courage to examine how this witness may have been coopted through an unconscious appropriation of cultural values that are, in fact, contrary to the Gospel.

There is an urgent need for strategy aimed at avoiding the actual breakdown of the consecrated life (Vita Consecrata 63). Elements of this strategy will include the witness of a renewed and effective communio among major superiors, bishops and lay leaders. Religious leaders are not called to be “managers of the routine” but rather sentinels that point the way to a new dawn.

3 TRENDS
– Sr. Hertha Longo, CSA & Bro. Larry Lundin, SJ

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. This presentation will begin with a description about the changes from TRENDS 2013 to TRENDS 2015. 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 2013 or TRENDS 2015.

1:00 – 4:30 pm
Tuition: $125
JOSEPH W. TOBIN, C.SS.R. is the Archbishop of Indianapolis. Born and raised in Detroit, he entered the Redemptorist Congregation and was ordained to the priesthood in 1978. He holds a Master’s Degree in Religious Education and a Master’s in Divinity. He served as a pastor of parishes in Detroit and Chicago. In 1991 he was elected Superior General of the Redemptorist Congregation and served for two terms in that role through 2009. During that time he also served as vice-chair of the Union of Superiors General and was appointed by the Holy Father to five synods. Archbishop Tobin was ordained to the episcopate in 2010 and appointed the archbishop secretary of the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life where he served from 2010-2012. In December 2012, he was installed as the sixth archbishop of Indianapolis. In addition to his responsibilities in Indianapolis, he is the Catholic co-chair of the North American Orthodox-Catholic Theological Dialogue and a member of the Joint International Commission for Theological Dialogue between the Catholic Church and the Orthodox Church. Archbishop Tobin is also a member of the Congregatio for the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life.

7:00 pm Opening Reception

WEDNESDAY, OCTOBER 28

7:00 am Eucharist
7:30 am Breakfast in Exhibit Hall
8:30 am Prayer

9:00 – 10:30 AM SESSION 1

INVESTMENT OUTSOURCING: THE PROS AND CONS
– James Modelski

Outsourced investment services, also known as Outsourced Chief Investment Officer (OCIO), is a growing trend. This session will explore fiduciary delegation of investment portfolio management. It will discuss what to outsource, how to transition functions, potential cost savings and ongoing oversight of outsourced services as well as the key question of whether fiduciary investment outsourcing is ultimately the right path for your organization.

JIM MODELSKI, Principal, Director of Communication & Education: DiMeo Schneider & Associates, L.L.C. Jim works with institutional clients providing advice and counsel on all areas of fund oversight including spending policy, asset allocation analysis, manager research, portfolio structure, portfolio rebalancing, performance monitoring, and overall investment policy. Jim obtained his bachelor’s degree from Columbia College and MBA from Loyola University, Finance and Economics. He is a Certified Fund Specialist (CFS) and a member of the Investment Analysts Society of Chicago and the CFA Institute.

ADVANCED TOPICS IN ACCOUNTING
– Kellie Goines and Sue Novak

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 in their community.

- Variations in Accounting and Reporting
- New and Emerging Issues (for example)
- Accounting for Leases
- Services of Personnel of an Affiliate
- Not-For-Profit Financial Reporting
- Other New or Relevant Accounting Issues

Frequently asked questions (for example)
- Contributed Use of Facilities
- Imputed Interest
- Reporting Entity
- Identifying Restricted Revenue
- Audit vs. Review
- Q&A
KELLIE GOINES, Partner – Not-for-Profit Services Group, Plante & Moran, PLLC, Kellie has more than 14 years of experience. She has served over 100 not-for-profit and religious organizations in accounting, auditing, tax and management consulting. She is a member of the firm’s 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.

SUE NOVAK, Partner – Not-for-Profit Services Group, Plante & Moran, PLLC - Sue has more than 29 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.

AMY HEREFORD 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.

She has degrees in science, communication and theology, as well as in civil and canon law. This background helps her assist religious institutes with their legal needs, and help those who are making important choices about the future of their institutes. She has worked mainly with small to mid-sized religious communities and nonprofits across the US and beyond, especially in assisting organizations in moving to the next level of strategic development. She helps clients maximize their resources for the sake of their mission and uses computers and information technology effectively to enhance communication and further organizational goals.

Her recent book Religious Life at the Crossroads (Orbis 2013) has been hailed as a “…thoughtful exploration of religious life unfolding today.” Sr. Amy has been admitted to practice in Missouri, Massachusetts and before the US Tax Court. She is a member of the Canon Law Society of America where she serves on the Consecrated Life Committee.

STRATEGIC PLANNING FOR THE SPIRIT LED
– Dr. Marisa Guerin

Strategic planning is important for clarity about how to move towards the future; but many religious organizations find it intimidating, complicated, or off-putting. Drawing on her broad experience with religious congregations and their sponsored works, Dr. Marisa Guerin will offer a practical "crash course" in some of the most useful planning methods that adapt well to communities and organizations that take their leading from the Spirit. The session will include models, tools, and case examples.

MARISA GUERIN, PHD, provides consulting and facilitation services through her company, Guerin Management Consulting, Inc. based in Philadelphia, PA. In addition to her corporate and family business clients, Marisa has worked with the leadership teams of over 50 religious congregations, sponsored works, and nonprofit organizations addressing issues of planning, strategy implementation, and organizational performance. A
skilled facilitator and trusted advisor, Marisa provides supportive guidance to leaders as they navigate the complex dynamics of change in their organizations. In addition to her consulting practice, Marisa delivers advanced professional development Master Seminars on the Dynamics of Leadership, Planning and Change which are geared to the unique needs of those who lead and facilitate faith based organizations.

5 MISSION ADVANCEMENT: THE KEY TO VIABILITY OF OUR MISSIONS AND OUR INSTITUTES
   – Sr. Georgette Lehmuth, OSF

In this presentation, participants will be presented with statistical and anecdotal information regarding development efforts in religious institutes. The relationship between the culture of mission and culture of philanthropy will be explored with implications for leadership, financial officers and membership. Practical recommendations and insights will be shared to help forward mission advancement and create viable options for the future of the institutional mission. There will be opportunities for participants to dialogue with presenter.

SR. GEORGETTE LEHMUTH, OSF, President and CEO of the National Catholic Development Conference, has spoken at national and international conferences on the topic of development/mission advancement. She is a nationally recognized expert in the nonprofit community. Since 2006, Sister has consecutively been named by the NonProfit Times as one of the “Top 50 Persons of Power and Influence” in the nonprofit sector. Sister served on a panel of religious leaders for a Senate Committee that studied the regulation of religious organizations and advocates for the Catholic fundraising community in terms of legislative and postal regulatory issues. Prior to her current position, Sister served in institutional leadership for the Franciscan Sisters of Our Lady of Perpetual Help of St. Louis, Missouri.

10:30 am      Break in Exhibit Hall

11:00 AM – 12:30 PM  SESSION 2

6 INVESTMENT COMMITTEES DECISIONS – BEST PRACTICES
   – Peg VanWagoner

This session will offer guidance on best practices for investment committees regarding:

- Formalizing an investment policy
- The market, active management and liquidity risks
- Structuring risk aware asset allocation parameters
- Targets, ranges and asset class styles
- Selecting investment managers for future success
- Ethical issues including SRI mandate execution
- Traditional asset class basics
- Trends in alternatives

The audience best suited to attend is investment committee members, treasurers and leaders.

PEG VANWAGONER, Senior Consultant, DeMarche Associates, Inc. Ms. VanWagoner has worked in the institutional investment field for 30+ years. Peg began her investment career at DeMarche in 1984 and returned to the firm in 2015. In between she was a senior relationship manager at American Century Investments and Thomson Horstmann & Bryant. Peg serves on the investment committees and/or leadership boards of The Healthcare Foundation, the Diocese of Kansas City – St. Joseph and the Women’s Foundation and the School of Social Welfare at the University of Kansas. Education: School of Business at the University of Kansas and MBA at Rockhurst University. Peg holds FINRA Series 6, 63, 7, and 24 licenses. Peg is a member of the CFA Institute and an active member of the CFA Society of Kansas City.

7 RIGHT RELATIONSHIPS FOR ECCLESIAL MISSION: THE POTENTIAL OF SUBSTANTIVE DIALOGUE
   – Sr. Sharon Holland, IHM

Countless case studies exist which testify to potential conflict between Bishops and Religious in a diocese. They also demonstrate what may be described as best practices toward right relationships. This workshop will
examine the theological basis for the canonical norms describing the respective rights of Bishops and of Institutes by applying them to concrete situations. The involvement of the participants in exploring the law and reflecting on experience will help provide insights into establishing and maintaining “Right Relationship for Ecclesial Mission.”

SHARON HOLLAND is the member of the Sisters, Servants of the Immaculate Heart of Mary (Monroe, Mi.) and holds an undergraduate degree in Music, a Masters in Religious Studies and a JCD in Canon Law from the Gregorian University in Rome. From 1988-2009 Sharon served on the staff, and as an Office Head at the Vatican Office for Consecrated Life (CICLSAL) working with canonical matters regarding religious institutes, constitutions, Public Juridic Persons and ecclesiastical property. In 2012 she was elected Vice-President of the IHM Congregation. She currently also serves as part of the Presidency of LCWR (Leadership Conference of Women Religious).

ADDICTIVE ILLNESS IN OUR MIDST
– Sr. Mary Ellen Merrick, IHM

At this time in the history of consecrated life it seems appropriate that individual congregations and networks would take some time and look at how healthy the membership is – healthy in mind, body, and spirit. There is no greater impediment to that goal than the brain disease of addictive illness. Whether a woman or man is directly impacted by addiction and/or has come from a family system where dysfunction was the norm, most communities would find themselves somewhere along the continuum of the disease process. This workshop will identify the many faces of addictive illness, offer suggestions on how to address this in a brother or sister, confront the stigma/shame that surrounds it, and assist membership that may have suffered from the behavior(s).

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 the Executive Director of the Women’s Program since 2010. Sr. Mary Ellen holds a Bachelors of Secondary Education and English Major from Marywood University; a masters 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.

PLANNING FOR YOUR COMMUNITY’S FUTURE CARE NEEDS: CHURCH PLAN OR CHARITABLE TRUST?
– Mark MacDougall & Kristine Sendek-Smith

Religious institutes require secure yet flexible legal structures to help manage the cost of caring for members as they retire from religious service. While a tax qualified retirement plan (“church plan”) and a continuing care charitable trust are often thought to be the same thing, a church plan can create unintended risks for religious communities and their members. This workshop will feature the use of hypothetical fact patterns- based on real case histories- in developing a clear understanding of these two retirement structures.

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.

KRISTINE L. SENDEK-SMITH, Akin Gump Strauss Hauer & Feld, LLP focuses her practice on civil litigation and white collar defense. In addition to providing advice on commercial matters, Ms. Sendek-Smith regularly counsels religious institutes and congregations on corporate governance and misconduct-related litigation, claims, investigations, risk management, and policy development. Ms. Sendek-Smith’s experience includes serving as an Assistant U.S. Attorney in Maryland. She
has previously presented at programs sponsored by the Resource Center for Religious Institutes.

**10 CYBER SECURITY, CYBER RISK AND DATA BREACHES, OH MY!**

– Tom Drez

What should you do when a data breach occurs? How can you best protect your organization and prevent the worst case scenario? This session will answer those questions and explore the current state of cyber security and related risks to your organization, including the worst case scenario of a full-scale data breach.

**TOM DREZ** is the Chief Information Officer (CIO) for Christian Brothers Services. As the leader of the Information & Technology Services division for the last 28 years, his responsibility has been to manage the portfolio of business and technology initiatives across all business units and all systems to continually improve services, efficiency, and effectiveness. In addition, Tom is responsible for information protection, including privacy and security, for the entire organization. Tom holds the designation of Certified Information Privacy Professional (CIPP) from the International Association of Privacy Professionals, is chairman of the Church Benefits Association’s Information Technology Group, and is a member of the Diocesan Information Systems Conference (DISC).

12:30 pm Buffet Lunch

**2:00 – 3:45 PM SESSION 3**

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

– Donna Miller – Legal Update; Sr. Sharon Euart, RSM – GHR Grants; NRRO

Each year RCRI delivers updates on issues and topics that have arisen in the previous year. This general session will include updates on some of the current and emerging legal issues that have the potential to shape the future of consecrated life and the various ministries that religious sponsor. This session will also include an update from NRRO as well as RCRI on the implementation of the grant on planning for the future from the GHR Foundation.

**3:45 pm Break in Exhibit Hall**

**4:00 – 5:30 PM SESSION 4**

**11 CATHOLIC RELIGIOUS ORGANIZATIONS AND SOLUTIONS TO BUILDING AN IMPACT INVESTING PORTFOLIO – LAURA BERRY, KATHLEEN HEGENBART & MARINA HERNANDEZ**

The invest/divest movement has gained significant momentum in recent years and Catholic religious organizations have been at the forefront of the movement expressed as the ‘compassionate care of God’s planet.’ This workshop will demystify the nomenclature and draw from the experience of the three speakers, whose commitment to active participation will be discussed. Their individual journeys and practical solutions will be the basis for conversation and questions.

**LAURA BERRY**, Executive Director, ICCR, since 2007. ICCR is a coalition of nearly 300 faith-and-values based institutional investors, representing well over $100 billion in invested capital, working to promote a more just and sustainable corporate world. ICCR members use a variety of strategies to address issues including human rights, sustainable food and water systems, access to healthcare, financial reform, climate change and corporate governance. Prior to joining ICCR, Laura served as the Senior Vice President for Philanthropic Services for the Community Foundation for Greater New Haven for five years, responsible for a $15 million grantmaking portfolio from the Foundation’s nearly $300 million endowment. After 17 years as a Large Cap Value Portfolio Manager on Wall Street and five years as a Chemical Engineer, Laura began her professional commitment to the non-profit sector in 2001, as the Director of the New London Development Corporation’s Community Development Initiative. Laura holds an M.S. from the University of Michigan, and a B.S. from Michigan Technology University. She received her Certified Financial Planner designation from Quinnipiac University. She currently serves as a Trustee for both the William Casper Graustein Memorial Fund and the National Priorities Project.
KATHLEEN HEGENBART, CIMC®, Global Institutional Consultant, has been a financial advisor to Catholic religious organizations and their related institutions since 1991. Beginning her career with Shearson American Express in 1983, she is now a Senior Vice President and one of 80 Global Institutional Consultants® at Merrill Lynch. Kathleen devotes her practice to specialized solutions particular to the requirements of the clients. Kathleen is an alumna of Newton College of the Sacred Heart, now Boston College. She holds positions on the Board of Trustees of Lasell College, and is a Trustee of St. Joseph Hill Academy, Staten Island, New York. She is a past president of the national Association of Professional Investment Management Consultants (APIC) and holds the designation of Certified Investment Management Consultant (CIMC®). Kathleen has been a member of the Investment Advisory Board of the Roman Catholic Archdiocese of Boston. Prior to its sale, she was a member of the Finance Committee of the Caritas Christi Healthcare System of eight Boston Archdiocesan hospitals. She is a Dame of the Sovereign Order of Malta.

MARINA HERNANDEZ, RSCJ, serves as the Canonical Treasurer for the Society of the Sacred Heart US & Canadian Province. Previously she served as Provincial Treasurer for the Chicago Province of the Society of the Sacred Heart and the United States Province. At other moments, her ministries have included Business Manager at Woodlands Academy, community organizing, housing counseling and AIDS training in San Diego, CA, and work with refugees and undocumented in Indiantown, FL. Originally from Chicago, IL, she attended Convent of the Sacred Heart, Chicago, IL. A graduate of Barat College with a BA in Psychology, she attended Notre Dame University for a working degree in Business Management and Administration.

UNDERSTANDING THE DIFFERENCE BETWEEN FACILITY ASSESSMENTS, MASTER PLANNING, AND FULL DESIGN, AND HOW THEY ALL DEPEND ON EACH OTHER
– Mark Higgins & Shane Larsen

Each community has specific strengths, challenges, visions and potential. Understanding how all this can work together is the purpose of this workshop. It may seem that many challenges that face each community are similar, but the solutions for each community are always different. The success of the facility assessment, master planning and full design is being able to provide a specific solution for those differences.

MARK HIGGINS, AIA, LEED AP, is a registered Architect and has been working with religious institutes for 16 years. Mark has a passion for the details and the importance of quality assurance of every project. He has provided concept master planning, strategic planning, and facility assessments for more than 20 religious institutes across the United States.

SHANE LARSEN, AIA, NCARB, is a registered Architect and has been working with religious institutes across the United States for 5 years. He prides himself on open communication and leading large group brain-storming sessions. On several occasions he has led groups of 100+ attendees while integrating audience participation.

RELIGIOUS INSTITUTES: TALES FROM THE CRYPT (WHEN RELIGIOUS INSTITUTES MERGE)
– Mark MacDougall

This year the RCI Conference takes place during Halloween week. In keeping with the season, Mark MacDougall will recount some of the strange and unexplained things that have happened when religious communities reorganize – and disturb the ground where they have resided for decades or even centuries. Tales from the Crypt will also include how the civil law deals with the mysterious and the paranormal when religious communities reorganize – in ways and places that you might not expect. Boo!!!

*See workshop 9 for Mark MacDougall bio

ABUSE PREVENTION, WHAT LIKELY HELPS: MYTHS AND OPPORTUNITIES
– Prior Roman Paur, OSB

Most Religious institutions are working diligently facing institutional and relational failures of the past with increasing openness and honesty both regarding community policies and clarification of behavioral standards. Learning continues to be instructive in developing programs and practices to minimize abusive relationships in the future. This workshop explores myths that may nonetheless still be operative in dioceses and
religious houses as well as initiatives that are more promising for promoting leadership integrity in the priesthood and religious life.

ROMAN PAUR OSB, PHD, is a monk of Saint John’s Benedictine Abbey, Collegeville, and Prior for 11 years of Trinity Benedictine Monastery, Fujimi, Japan. He is the founding executive director of the Interfaith Sexual Trauma Institute (ISTI), a joint educational initiative of Saint John’s Abbey and University, partnering with an independent board, established to advance our understanding and prevention of clergy sexual misconduct. He continues his consulting work under the aegis of the Faith Community Learning Resource (FCLR) as an international speaker on relational integrity in the professions and leadership trust in systems of religion. Roman is a member of the Praesidium National Advisory Board.

THE TOP 5 CHALLENGES & SOLUTIONS FOR MANAGING YOUR COMMUNITY’S TRANSPORTATION NEEDS

– Tammy Cheever, Geof Fowler & Gael Sopchak

Due to rising operating costs and the aging population of their drivers, Religious Communities are finding new ways to meet their transportation needs. Discover the Top 5 Challenges revealed from a nationwide survey of Women Religious leaders from around the nation, and discuss practical solutions with a panel of experts including members of Religious leadership, a Controller of a Congregation, and several experts from the fleet management industry. A professional facilitator will guide you through an Action Planning process to help you begin the process of developing a Transportation Strategy for your community. Here are a few of the topics to be discussed:

- How to right-size your vehicle fleet
- Managing vehicles as portfolio assets – “improved stewardship”
- Capital deployment alternatives for transportation
- How to calculate and optimize vehicle lifecycle costs
- Driver safety, and quality of life

- How to identify at-risk drivers
- What is Negligent Entrustment?
- Para-transit vans and shuttle buses for non-driving members

TAMMY J. CHEEVER is the Director of Fleet Management for CARITAS Vehicle Services and is celebrating her 20th year with the company. Tammy has a Bachelor’s Degree in Business from the University of Iowa. She began her career with CARITAS as a Fleet Manager assisting clients with the acquisition, maintenance management and disposal of their vehicles. Since assuming the role of Director of Fleet Management she has enjoyed working with Religious Communities and has come to understand the unique needs of the non-secular driver and Congregations as a whole. It is her mission to develop and implement a strategic business plan for merging, right-sizing and optimizing the overall life-cycle cost of each Religious Community.

GEOF FOWLER, as the Vice-President of Client Relations for Network, has spent the last 13 years in his leadership role helping Catholic Religious organizations to improve their approach to managing vehicles in order to reduce the cost of providing transportation for their communities. Network, a division of LeasePlan, the world’s largest fleet management company, specializes in providing solutions that improve driver safety, and the utilization of vehicle assets. Geof is currently responsible for over 4,000 drivers from both small and large Women Religious Communities. Over the course of his 28-year automotive career, Geof has served in many roles including operations, management, finance, and consulting. He also holds certifications as an ASE Master Technician and Certified Vehicle Leasing Executive. Geof resides in Atlanta Ga with his wife and two sons, and he recently celebrated his 20th wedding anniversary.

GAEL A. SOPCHAK is the General Manager of the Sisters of St. Francis of the Neumann Communities, with congregational offices located in Syracuse NY. She began with the Sisters of St. Francis as General Business Manager in 2006 following their reconfiguration. As General Manager she is responsible for development and direction of the congregation’s financial plans, policies and processes, and for overall administration, management and organizational planning. Gael has an
MBA in Accounting from Syracuse University, and a BS in Biology from St. Lawrence University in upstate NY. Prior to coming to the Sisters of St. Francis, she was the Administrative Officer for the Episcopal Diocese of Central NY for over ten years.

THURSDAY, OCTOBER 29

7:30 am  Breakfast in Exhibit Hall
8:30 pm  Prayer

9:00 – 10:30 AM  SESSION 5

16 LEADING TODAY TO SUSTAIN TOMORROW: WHAT AND WHOM ARE WE LEADING?
Sr. Carol Zinn, SSJ

Religious Institutes face enormous planning realities focused on present needs in hopes of serving the future. Might it be possible that the actual planning capable of birthing a future has more to do with the mission and charism than the congregation/membership needs? Come and engage this inquiry as, together, we discern the role of leadership that sustains the mission and charism for tomorrow.

CAROL ZINN, SSJ, is a member of the Sisters of Saint Joseph (Philadelphia) and the immediate past-president of the Leadership Conference of Women Religious (LCWR). In addition to serving on her Congregation’s General Council, Sr. Carol served in diverse educational ministries and as representative of the international Sisters of Saint Joseph NGO at the United Nations. Sr. Carol has consulted extensively with leadership teams of religious institutes on the topic and themes of the future of religious life. Her experience is grounded in a BS in Education from Chestnut Hill College, a Masters in Theology from St. Bonaventure University and a Doctorate in Curriculum Development from the University of North Carolina, Greensboro. Sr. Carol offers a depth perspective on planning for the future.

17 STAFF REDUCTIONS IN GOOD FAITH
Mary Kessler

Today’s organizations are faced with constant change. Leaders/managers in religious congregations are challenged in decisions and procedures that affect workers whose jobs are changed or eliminated. This workshop will address restructuring and layoffs grounded in gospel values, while adhering to the laws that are meant to protect both the employee and the employer. Topics will include: needs assessment, planning for a reduction in force, legal issues and a solid communication plan throughout the process.

MARY KESSLER has over 30 years of human resource experience in a Catholic Church environment. She served the Diocese of Rochester, NY as diocesan director of human resources, and continued her career working on staff for the National Association of Church Personnel Administrators (NACPA). For the last 8 years she has worked as an independent contractor for various Catholic employers. In each of these roles, she has assisted parish and arch/diocesan staffs, religious congregations of both women and men and priests in creating personnel systems grounded in the social teaching on workplace justice. Mary has presented workshops on church management and helped her clients implement effective administrative practices and build strong organizational operations. She has worked on-site as a human resource director for Catholic Charities agencies, arch/dioceses and religious congregations. Additionally, she has conducted executive searches and retirement studies for men’s and women’s religious congregations. Mary Kessler earned her BA degree from Madonna University in Livonia, MI and a Certificate in Business Management from St. John Fisher College in Rochester, NY.

18 GOVERNMENT PROGRAMS UPDATE 2015
Connie Neeson

This workshop will cover the latest changes in government benefit programs for 2015, with a look ahead to pending changes for 2016, including 2015 and 2016 income standards for various programs. Benefit Programs discussed will include: Social Security, SSI, Medicare A, B, C & D, Medicaid (including the ongoing implementation of managed care within Medicaid.
programs in various states), QMB, SLMB, QI-1, the Low Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP). We will continue discussion of the evolving potential impact of Health Care Reform legislation (the Patient Protection and Affordable Care Act or PPACA) for religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order in managing ongoing participation in government programs.

CONSTANCE NEESON is a Licensed Social Worker in the state of Indiana. Her ministry is assisting members of religious communities to apply for the benefit programs for which they are eligible. Constance is the Director of Benefit Eligibility Management for Religious, a division of Brenner, McDonagh & Tortolani, Inc., specializing in implementing efficient benefit eligibility management programs for over 40 religious institutes. Over the past 15 years, over 200 congregations have contacted Constance for advice on applying for benefits for their members. Constance has been a featured speaker at previous RCRI, NATRI, and OMRI conferences, and at CORT meetings. She has also spoken at numerous congregational gatherings, educating the religious about the scope of benefit programs which are available to all citizens.

DIVEST/REINVEST/ADVOCATE: STRATEGIES FOR A LOW CARBON FUTURE
– Sr. Patricia Daly, OP & Cheryl Smith

Management of our investments can be a powerful catalyst for social change. In the rising debate around the role of invested capital in responding to climate change, investors are considering the variety of approaches available – investment in solutions, enhanced engagement, or divestment, and the corresponding effect on portfolio performance, risk, and impact. We will review options for investors and discuss the implications of each approach, making the case that advocacy and divestment are not mutually exclusive.

SISTER PATRICIA DALY, OP, is a Dominican Sister of Caldwell, NJ and has worked in Corporate Responsibility and Socially Responsible Investing for over 35 years. She serves as the Executive Director of the Tri-State Coalition for Responsible Investment, an organization of 40 Roman Catholic Dioceses and Congregations of Women and Men in the NY metropolitan area. Pat represents these institutional investors to the Interfaith Center on Corporate Responsibility. She has negotiated with companies on issues of human rights, labor, ecological concerns, equality, and international debt and capital flows. Pat played a role in positioning the agenda of global warming into the priorities of Corporate America. She is the recipient of the 2014 Joan Bavaria Award, presented by Ceres and Trillium Asset Management.

CHERYL SMITH, PHD, CFA, is a managing partner, economist, and investment manager. She leads the fixed income management process at Trillium, and is co-manager of the Green Century Balanced Fund. She began her investment management career at Trillium Asset Management in 1987. In 1992 she joined United States Trust Company in Boston (now known as Walden Asset Management) as Vice President and portfolio manager, before rejoining Trillium in the fall of 1997. Cheryl is currently a Board member of Oikocredit USA, and on the Steering Committee for the Institute for Responsible Investment. She is immediate past chair of US SIF and current member of its Policy Committee, and she recently served on the Board of Episcopal Divinity School. Cheryl is a member of the Boston Security Analysts Society and is a Chartered Financial Analyst charterholder. 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.

HOW TRUSTS REALLY WORK
– Ken Aldfer & Mark MacDougall

Trusts are a lot like politicians – frequently discussed but often misunderstood. This workshop will be focused on the undisputed truth about trusts and how this ancient legal structure can help religious communities at every stage of development. Using illustrative “fact patterns” to promote group discussion, the goal of this session is to dispel much of the mythology that surrounds the use of trusts and discuss how the trust structure may be used effectively by religious institutes at every stage of their lives.

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.

*See Workshop 9 for Mark MacDougall bio
10:30 am Break in Exhibit Hall

11:00 AM – 12:30 PM SESSION 6

21 FRANCISCAN VILLA – A NEW COLLABORATIVE MODEL FOR COMMUNITY LIVING
– Mark Burritt, Gael Sopchak & Dan Suits

The Sisters of St. Francis of the Neumann Communities is a reconfigured institute with approximately 425 members in five major residential areas. The leadership recognized that owning five motherhouse campuses and multiple off-campus mission houses was not financially sustainable. The decision was made to build a new unlicensed residence where sisters could age in place together, where licensed care would be provided by PACE (Program of All–inclusive Care for the Elderly) and a licensed home care agency. Community leadership initiated discussions and entered into a business partnership with Hearth Management, a widely recognized owner/operator of senior living communities. A standing affiliation between Fahs Construction Group and Hearth on the development of new properties enabled a reduction in construction costs and improved building efficiencies. EGA Architects from Massachusetts was also added to the team. During this session the business partnership between The Sisters of St. Francis and Hearth Management will be discussed and the various opportunities and challenges each faced. Topics of discussion will be: design/construction, health care, partnership arrangements, exit strategy for the congregation, how this can be applied in other communities and a general sharing of best practices learned through this process.

MARK BURRITT has been the Chief Financial Officer of Hearth Management LLC and Fahs Construction since 1998 and 1990 respectively. Mark is responsible for project finance, corporate accounting, the creation and monitoring of all financial controls, property and corporate budgeting and the internal review of all legal documents. Between 1981 and 1985, Mark was assistant controller for Murray Walter, Inc., a top 500 Construction company. He was involved in the development of several Section 8 housing projects throughout the Northeast for Walter Perlstein, a subsidiary of Murray Walter, Inc. Mark has been involved in the start-up or turn-around of several businesses in the last thirty years. Mark received a Bachelor of Business Administration from Campbell University.

*See workshop 15 Sopchak bio

DAN SUITS has been the Chief Operating Officer of Hearth Management LLC since 1997 and Vice President of Fahs Construction Group since 1995. Dan is responsible for the daily supervision, direction and continued growth of Hearth Management and its staff of more than 1,800 professionals and its fifteen communities. He also oversees and works closely with Fahs Construction Group in the development of new Hearth properties. Dan’s 20 years of Operational oversight has helped Hearth developed cutting edge programming for their residents. Dan holds a degree in Economics from St. Lawrence University and has attended executive classes at the Wharton Business School. Dan is a member of The Assisted Living Federation of America (ALFA) and the Empire State Association of Assisted Living. In late 2003 Dan was honored by the Alzheimer’s Association of Central New York for his active community involvement in and support of Alzheimer’s-related work in Onondaga County, New York.

22 HUMAN TRAFFICKING – A DEFINITIVE LOOK AT HOW BETTER SUPPLY CHAIN MANAGEMENT CAN BRING ABOUT A SAFER WORLD.
– Lydia Long, Amy O’Neill Richard, David Schilling & Julie Tanner

This session will examine the current state of the fight against human trafficking – more than 20 million people worldwide are trapped in situations of forced labor, bonded labor, child labor and sexual servitude, according
to the International Labor Organization (ILO), a United Nations agency. Many of these victims are children. This wide range of crimes and abuses falls under the term “human trafficking.” Faith-based organizations have for many years been some of the strongest and most active opponents of human trafficking, raising awareness among the general public and offering aid and sanctuary to victims. But religious institutions can also use their influence as shareholders, regardless of their portfolio size, to oppose human trafficking by enlisting corporations as allies in the fight. With so many industries being impacted by this crime, there are a myriad of opportunities for religious investors to work with corporations to improve their operations, particularly with respect to their supply chains in developing countries, and to help eradicate human trafficking. We will examine what is currently being done by governments, companies, religious institutes, and others about human trafficking, and discuss how investors can make an impact. At the end, the audience will be asked to share their own efforts.

LYDIA LONG is a Senior Programs Director at Verité and leads Verité’s Corporate Consulting and Training Programs worldwide. Her current focus is helping companies develop the capacity to avoid forced labor, especially among overseas migrants, throughout their supply chains. Recent programs have included development and implementation of ethical sourcing strategies, tools and training for such diverse brands and retailers as Apple, Walmart, McDonald’s, Burberry, Nestle and Patagonia, as well as strategic consulting to the construction and energy sectors. She is a member of the Verité team developing a pathway for suppliers to comply with the new Executive Order to mitigate trafficking in goods purchased by the U.S. government. Lydia is also currently managing a multi-year grant to address debt bondage and other forced labor risks among Filipino and Chinese guest workers in Japan.

AMY O’NEILL RICHARD is Senior Adviser to the Director in the State Department’s Office to Monitor and Combat Trafficking in Persons (TIP office). She was an original member of the office and instrumental in developing its foundational goals and policies. As Senior Adviser, she engages the private sector to leverage resources and expertise to help prevent human trafficking and serves as the co-chair of the U.S. Government’s Senior Policy Operating Group’s Committee on Human Trafficking Research and Data. Previously, Ms. Richard oversaw the production of the Department’s annual Trafficking in Persons Report, the most comprehensive anti-trafficking assessment issued by any government. Her own research work on international trafficking to the United States has earned her State Department awards, and her findings were used to support the drafting of the United States’ Trafficking Victims Protection Act. Prior to the TIP office, Ms. Richard worked in the State Department’s Bureau of Intelligence and Research’s Office of Terrorism, Narcotics, and Crime where she received the Bureau’s Analyst of the Year Award for shedding light on transnational organized crime.

DAVID SCHILLING, Senior Program Director – Human Rights & Resources, ICCR (Interfaith Center on Corporate Responsibility). David Schilling joined the staff at the ICCR in 1994 and has worked with ICCR members and allies to engage corporations, cross-sectoral and multi-stakeholder initiatives on human rights in corporate operations and global supply chains. He has participated in delegations to a number of countries in Africa, Asia and Latin America visiting factories and meeting with workers and non-governmental organizations. For the past ten years, David has provided staff leadership for ICCR’s programmatic initiatives to counter human trafficking and modern day slavery in the US and globally. He has co-authored several publications, including, ICCR’s Social Sustainability Resource Guide. David is currently chair of the Advisory Board of the Global Social Compliance Program. A United Methodist minister, David has worked as Assistant Dean of the Chapel, Stanford University; worked closely with Cesar Chavez while serving as a minister in northern California; co-directed the Riverside Church Disarmament Program in New York City and was program coordinator of the Fellowship of Reconciliation-USA. David has a bachelor’s degree from Carroll College in Wisconsin in philosophy and religion; masters of divinity from Union Theological Seminary; a graduate of the International Fellows Program, Columbia University and has an advanced professional studies certificate from Pacific School of Religion.
JULIE TANNER, Assistant Director, Catholic Responsible Investing, CBIS. Ms. Tanner is responsible for engaging with boards and corporate management to encourage the development and implementation of robust and substantive environmental, human rights and corporate governance policies and practices related to Catholic Responsible Investing. She conducts strategic company and industry assessments, authors reports analyzing corporate performance, and creates cross-border coalitions to improve corporate and industry performance. Ms. Tanner joined Christian Brothers Investment Services (CBIS) in 2002. She is a member of the governing board of the (ICCR) and on the board of ECPAT-USA (End Child Prostitution and Trafficking). Her leadership to improve corporate performance on human rights issues led the Coalition to Abolish Slavery and Trafficking (CAST) to honor CBIS with its Founder’s Award in 2011. She has co-authored numerous articles and publications. Prior to joining CBIS, Ms. Tanner spent ten years in the financial services industry, most recently with JPMorgan Chase, before moving to lead the Finance and Environment Program at National Wildlife Federation. Tanner holds a B.A. from Rutgers University, an M.B.A. from Pace University, and an M.S. from North Carolina State University.

INTRODUCTION TO ALTERNATIVE INVESTMENTS FOR RELIGIOUS INVESTORS
– Scott Santin & Marissa Hine

Alternative investments, particularly hedge funds, have increasingly been viewed by investors as the ideal solution for diversifying traditional stock and bond investments and increasing portfolio returns. The broad universe of alternatives including hedge funds, private equity, managed futures, and real estate are complex and come with a distinct set of positive and negative attributes that investors should be aware of prior to committing capital.

SCOTT SANTIN, Managing Partner, co-founded The Concord Advisory Group, Ltd. in 1988; he has served as an investment consultant to religious communities for over twenty five years. Prior to founding Concord, Mr. Santin worked for Merrill Lynch, PaineWebber and Hamilton & Co. He earned a B.S. degree in Finance from Rider College in Lawrenceville, N.J. and a MBA degree from Rutgers University in Newark, N.J. He has been a lifelong resident of the Princeton, N.J. area.

MARISSA HINE, CFA, Research Associate – Prior to working with Concord, Ms. Hine was most recently employed at The Burgiss Group as a Senior Client Service Associate. She also held positions with GMAC Residential Capital, Fitch Ratings and Deutsche Bank. Ms. Hine is a CFA charter holder and she obtained her B.A. in Business and Economics from Lafayette College.

ASSOCIATES AND THEIR RELATIONSHIPS TO RELIGIOUS INSTITUTES: GIFTS AND CHALLENGES
– Sr. Deborah Cerullo, SSND

The phenomenon of lay associate programs connected to religious institutes has been developing steadily since Vatican II. According to the North American Conference of Associates and Religious, associates are lay people who affiliate with a religious institute and commit to living the mission and charism of the religious institute within their independent, lay life style. This session will explore how the Code describes these programs, as well as Church documents that relate to charisms of religious institutes and their appropriate sharing with the laity. The session will further examine developments concerning identity and boundary issues that sometimes occur in the relationships between religious institutes and their associates and will offer suggestions for handbooks or other policy manuals that are used to facilitate that relationship.

SR. DEBORAH CERULLO, SSND, J.D., J.C.L., is an attorney and canonist representing Catholic religious organizations in her private practice located in Providence, RI. A member of the School Sisters of Notre Dame, Sister Deborah received her Juris Doctorate from Boston University and her canon law degree from the University of St. Thomas Aquinas in Rome, Italy. Before beginning her own law practice over ten years ago, Sr. Deborah served on the law faculties of the University of Notre Dame and Boston College. Other previous ministries include staff attorney for both secular and faith-based poverty law clinics and executive
director of a law center co-sponsored by four religious institutes. Sr. Deborah has published numerous articles on Catholic organizations and the law in a wide variety of publications and has lectured extensively on issues related to religious life. She has been on the faculty of the annual Institute for Law and Religious Life at Misericordia University in Dallas, PA, for the past ten years and is a member of the Canon Law Society of America and the Rhode Island Bar Association.

STRUCTURE, STRATEGY AND STEWARDSHIP: HOW THEY RELATE TO YOUR INVESTMENT PORTFOLIO  
– Rory Duncan & Melanie Roberts

This session will discuss the thinking behind the structure of a balanced portfolio; which assets to consider and why/how asset classes have behaved in different economic environments. It will then cover some investment ideas and insights into investing for the next decade. Lastly it will address Stewardship (incorporating ethical restrictions, voting and engagement); what are the key governance issues facing investors today and how is an ethical overlay embedded into an investment portfolio.

RUADHRI DUNCAN, Investment Director; has over 15 years’ investment management experience and joined Sarasin & Partners in 2011. He has operated as both a fund manager and a charity trustee. After leaving the Army, Ruadhri completed his fund management exams at Leopold Joseph and Sons before moving to Newton Investment Management in 1999. There within their charities department, he managed charitable funds for over 12 years. Ruadhri is an associate of the Chartered Institute for Securities and Investment and holds a number of charity trusteeships.

MELANIE ROBERTS, Investment Director. Prior to joining Sarasin & Partners in 2011, Melanie spent 16 years at Newton Investment Management as a fund manager of charity, private client and pension fund portfolios. She qualified with a degree in Modern Languages from Durham University and is an Associate of the Chartered Institute of Securities and Investment. Melanie is primarily responsible for the management of charity and pension fund portfolios and is the current Editor of the Sarasin House Report.

26  2:00 – 3:30 PM  SESSION 7

THE HUMAN RESOURCE CYCLE: HIRING, INTERVIEWING AND PERFORMANCE MANAGEMENT  
– Mary Kessler

This workshop covers the planning, preparation and onboarding of employees during a job search with procedures and tools for conducting meaningful performance appraisals. It begins with a study of why each part of the employment cycle has a direct impact on employment success and how to avoid high turnover costs. Other topics include: behavioral interviewing, orientation and onboarding and giving employee feedback in appropriate and legal ways. Practical information and sample tools are included.

See Workshop 16 for Mary Kessler bio

27  FOOD SECURITY AND THE ROLE OF YOUR INVESTMENT PORTFOLIO  
– Mike Masters & Cathy Rowan

Religious communities minister to those who are hungry and address root causes of food insecurity. How do our investments impact this issue? The panel will (1) provide an explanation on the link between food insecurity and excessive speculation in food commodities through complex financial instruments and (2) present steps an institution can take to align its Investment Policy with concerns about food security, without increasing risk to portfolio returns.

MICHAEL W. MASTERS is founder and chairman of the board of directors of Better Markets, Inc., a Washington, D.C. based nonprofit, nonpartisan organization dedicated to policy and financial reform in the public interest. Mr. Masters established Better Markets in 2010 out of a growing concern for the far-reaching harmful effects of unregulated derivatives markets that began in 2008. The Better Markets mission is to promote transparency, accountability and oversight in the domestic and global capital and commodity markets. As a highly regarded expert on commodities and financial regulation, Mr. Masters has testified before congressional committees and government agencies, addressed consumer, corporate, investor and academic groups, and appeared in media outlets. Mr. Masters is founder and managing
CATHY ROWAN is the corporate social responsibility consultant for the Maryknoll Sisters, Director of Socially Responsible Investments for Trinity Health and consults with the Tri-State Coalition for Responsible Investment. A former board member of the Interfaith Center on Corporate Responsibility (ICCR), Cathy is active on access to health care; access to nutrition; environmental impacts of the health care industry; water; tobacco control and violence in society. From 1987-2002, Cathy was a Maryknoll Lay Missioner, living in Sao Paulo, Brazil, for six of those years with her husband and two children, and working on a diocesan human rights team, on women and children's issues, and with lay ministry formation teams. She has a BA in Religion from Barnard College and an MS in Rehabilitation Counseling from Virginia Commonwealth University.

“WELL DONE, GOOD AND FAITHFUL SERVANTS”: MOVING TOWARD COMPLETION
– Sr. Sandy Schwartz, FSM

Doing what is ours to do. Making a difference. Passing the torch. Hearing Someone say, “Well done, good and faithful servant.” . . . This is the work of a life well lived. Come hear one congregation’s experience of its move toward completion. Topics include: where to begin, how to proceed, what to pay attention to, why rituals are helpful, what worked for our congregation, and how the process changed the group.

SISTER SANDY SCHWARTZ, FSM, born in Quincy, Illinois, entered the Sisters of St. Francis of Maryville, Missouri (OSF) in February 1964. She earned a BSN from Avila College (Kansas City, Missouri), an MA in Christian Spirituality from Creighton University (Omaha, Nebraska), and a certificate as a Hospice and Palliative Nurse. In addition to serving in leadership in her original congregation, she was elected to serve in leadership during and after the reunification of the two congregations that formed the Franciscan Sisters of Mary in August, 1987. She has been a nurse, hospice nurse, and director of pastoral care, vocation director for her congregation and a diocese and a nursing instructor. On August 31, 2015, Sandy will complete the second of two consecutive leadership terms.

TRENDS FOR EXPERIENCED USERS
– Sr. Hertha Longo, CSA & Matt Wade

This presentation is intended for those with prior experience using TRENDS. Topics include: creating scenarios step-by-step using the scenario builder; assumptions and methodology for creating scenarios involving major changes in an elder care delivery model or in a care facility. Assumptions involved in the sale of buildings and property will also be examined. The RNA Worksheet tab will be examined and its implications for including new members and departing members. The new features of TRENDS 2015 will also be discussed.

*See TRENDS Pre-Conference for Longo bio

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 for a number of years as a consultant for the Planning and Implementation Process. Matt has most recently been 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.

INTERNAL CONTROLS 3.0: ASSESSING THE RISK OF YOUR ORGANIZATION
– Laurie Horvath, Ellen Labita, Krista Pankop & Brian Sanvidge

Participants attending this workshop will gain insight on internal controls and the importance of assessing risk within their organizations. Our panelists will share knowledge around specific procedures to address risk and actual stories illustrating what happens when things go wrong.
Laurie Horvath has more than twenty years of public accounting experience, including twelve years with an international firm, with five of those years in a national office role. As Baker Tilly’s Not-for-Profit Practice Leader in Detroit, she specializes in providing auditing, accounting, and consulting services to not-for-profit clients, including financial statement and compliance auditing for OMB Circular A-133.

Ellen Labita is a not-for-profit services partner in the New York regional offices of Baker Tilly Virchow Krause, LLP. She also serves on Baker Tilly’s Growth and Retention of Women firmwide task force.

Krista Pankop, Partner with Baker Tilly Virchow Krause, LLP, has been with the firm since 1995. She specializes in the not-for-profit industry. Krista has extensive experience with compliance auditing including OMB Circular A-133, the Department of Housing and Urban Development, and the State Single Audit Guidelines.

Brian Sanvidge 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 Virchow Krause, LLP.

9:00 – 10:30 AM  SESSION 8

31 AGING: A CHALLENGING CHAPTER
– Behavior Topic – Sr. Dorothy Heiderscheit, OSF

As Congregations experience their members aging, the challenge surfaces of living with and caring for members, friends, classmates with Cognitive impairment issues. Aging gracefully is a challenge in itself. Providing care and structure that honours the dignity of their lives when faced with cognitive challenges only adds to this experience. This workshop will identify the common types of cognitive impairment, the symptoms, and coping strategies.

Sr. Dorothy Heiderscheit, OSF, MSW, ACSW, RSW, currently serves as the CEO of Southdown Institute in Holland Landing, Ontario, Canada. Previous positions have included serving as President for 8 years with the Sisters of St. Francis of Dubuque, IA, 13 years as Director of Family Ministry with Catholic Charities, Inc in Jackson, MS, and 8 years as a psychotherapist for Religious and Clergy in the Dubuque Tri State Area. In addition to facilitation and consultation Dorothy has presented workshops internationally on various topics such as: Community Living Skills, Sexuality and Intimacy, Conflict Management, and Aging.

32 CHOOSING TO BE PRO-ACTIVE ABOUT THE FUTURE: THE REALITY OF ECCLESIASTICAL INTERVENTION IN A RELIGIOUS INSTITUTE FACING DECLINE
– Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP

A religious institute or a province will have many questions about its future when facing a reduction in its membership, and/or a loss in its capacity to exercise leadership competently, and/or a lack of sufficient financial resources to sustain its members and their mission. The question may arise about whether ecclesiastical authority or the institute’s superior general will intervene, even possibly with the ultimate action of suppression. This workshop will examine in particular these concerns: Why and how the suppression of an institute is ordinarily implemented by the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life? What usually leads to the suppression of a province? What happens to any remaining temporal
goods at the time of suppression? If an institute or province initiates planning for its future, can that trigger suppression? Does the diocesan bishop have a role in either the institute’s or province’s planning process or suppression? When would alienation be involved if setting up a legacy is part of an institute’s or province’s plan for the future? What are the roles and responsibilities of the leadership, the chapter, and the community for planning and decision-making about the future? What if planning and/or implementation need more time than the current leadership’s term of office and it is time for elections?

LYNN JARRELL, OSU, is a member of the Ursuline Sisters of Louisville, Kentucky. She has a Doctorate in Canon Law (The Catholic University of America, 1985) and a Masters in Communications (Western Kentucky University, 1974). Lynn served in her congregation’s leadership, as President (2008-2014) and Vice-President (1992-1996). Lynn was the Associate Director of Canonical Affairs for the Resource Center for Religious Institutes in Silver Spring, Maryland (2005-2008). Lynn has taught canon law at various Schools of Theology, seminaries and other programs as a regular faculty member, adjunct professor, and lecturer. Over the years she has contributed to canonical publications, either as editor or author of articles. Lynn was full-time in the Tribunals for the Diocese of Evansville, Indiana, (1984-1988) and the Archdiocese of San Francisco, California (1997-2001). Lynn also has served in the leadership of the Canon Law Society of America as president, vice-president, secretary and a member of its Board of Governors for seven years. Since 1984 Lynn has worked with the leadership of religious institutes in the United States and beyond in the role of consultant, presenter, and teacher on a variety of topics. Since August 2014 Lynn is once again serving as a consultant and presenter to religious institutes on a range of canonical and religious topics, including presenting retreats on religious life.

NANCY REYNOLDS, SP, is a member of the Sisters of Providence of Saint Mary-of-the-Woods, Indiana. She has a Licentiate in Canon Law (The Catholic University of America, 1984) and a Masters in Mathematics (University of Nebraska, 1972). Nancy served in her congregation’s leadership as a Councilor from 2001 to 2011. She was Treasurer of her Congregation from 2001 to 2013. Nancy has served in the Tribunals of the Diocese of Evansville, Indiana (1978-1986) and the Archdiocese of San Francisco (1986-2001). Nancy has taught part time in a number of Schools of Theology, Seminaries and Pastoral Studies Programs of several different Universities and Colleges. She served in the capacity of Adjunct Professor. Nancy has been the editor of several canonical publications and contributed to others. Nancy served on the Board of Governors of the Canon Law Society of America for two years. Nancy served for six years as a member of the Board of LCWR (Leadership Conference of Women Religious). For two of those years she served on the Executive Committee of LCWR. Since 1984 Nancy has worked with numerous leadership teams of religious institutes and also served as advocate for many individual religious or leadership teams. She has served as consultant and presenter on various canonical topics. In 2013 Nancy began the ministry of canonical consultant to individual religious, religious institutes or bishops of dioceses on topics of religious law.

“REBUILD MY HOUSE” A SMALL FRANCISCAN CONGREGATION RESPONDS TO THE CALL
– Sr. Ellen Carr, OSF

This workshop will explore key elements of the process used by the Franciscan Sisters of Baltimore in deciding to sell two thirds of their motherhouse to a low-income housing developer while renovating the remainder as assisted living for their sisters. These elements include: reasons for repurposing their motherhouse; how leadership, membership, and advisers were engaged; their desired outcomes; the selection of a partner; and their approach to funding. A ten year perspective will be offered.

SR. ELLEN CARR, OSF, is the Administrator of Clare Court Convent. She was responsible for planning and implementing the transformation of the former motherhouse of the Franciscan Sisters of Baltimore into Clare Court, a multi-generational residential community of religious, families and individuals. She is now actively involved in developing a comprehensive plan to meet the retirement and health care needs of her congregation, The Sisters of St. Francis of Assisi, Milwaukee, WI. She has a B.A. in Economics and a Master’s in Urban and Regional Planning. She has raised $14 million for her congregation’s capital projects. She is featured
in the NRRO video, “A Future Full of Hope” and is a participant in a NRRO Think Tank on Stewardship of Religious Property.

34 FRAUD DETECTION AND PREVENTION
   – Sonia Himmelberg

“The biggest career risk for a treasurer today may not be an expensive treasury operation, but rather a major surprise in the form of fraudulent transactions” (Journal of Payments Strategy & Systems). This presentation provides a basic overview of fraud/risk management scenarios that occur in various payment systems, as well as a description of cyber-crimes and how they impact your banking practices, and concludes with best practices designed to protect your financial assets.

SONIA R. HIMMELBERG is Vice President for TD Bank and a Florida District Sales Manager for Treasury Management Sales and Service. Sonia has over 25 years in the banking industry and a 13 year background in law. Throughout her career, she has received numerous awards, including Outstanding Sales Partner two years in a row. In 2010, she completed a yearlong Excelling Leaders Program sponsored by The South Financial Group. Sonia is a member of the Association of Financial Professionals where she obtained her CTP (Certified Treasury Professional) certification in 2000. She is also a member of the Healthcare Financial Management Association and participates in the local North Florida Chapter.
CONFERENCE REGISTRATION

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 full hot 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 at www.trcri.org under “Programs.” Registration is available through October 9, 2015, but save $50.00 by registering early!

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RCRI members include all members and employees of religious institutes with paid 2015 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 Caribe Royale.

CANCELLATION POLICY
- For written cancellations before September 17th, 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 18th and October 16th.
- On or after October 16th, 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

CONFERENCE SITE

The 2015 RCRI National Conference (lodging and events) will be held at the Caribe Royale.

8101 World Center Drive
Orlando, Florida 32821
Phone: 407-238-8000

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

SPECIAL RATES FOR RCRI CONFERENCE ATTENDEES

The hotel rate of $145 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 11, 2015. Direct reservations to the hotel will not be awarded at the RCRI discount rate.

RESERVATIONS

All reservations must be made through the Nix & Associates online reservation system; a link is on the RCRI website, www.trcri.org under Programs. 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 & Associates 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 Caribe Royale does have Wi-Fi available in rooms and public areas for $9.95/per day (subject to change). They have a full service business center and provide several on-site dining options. The hotel also has an extensive fitness center and three outdoor swimming pools open year round.

AIRPORT & TRANSPORTATION

The nearest airport is Orlando International airport (MCO) located 16 miles from the Caribe Royale. The hotel does not provide shuttle service.

From Orlando Airport

Take 417 South (Central Florida Greenway) to exit #6. Follow to World Center Drive (do NOT turn right onto International Drive). After the light, the Caribe Royale is the 1st hotel on the right. Tolls will total $2.50

SHUTTLE SERVICE

Will be put on our website once it is available.

DISCOUNTED DISNEY TICKETS

For advance purchase of Florida Resident Tickets and specially priced Disney Meeting/Convention Theme Park tickets, please call 407-566-5600 or by visiting: https://www.mydisneymeetings.com/rcri15/. Please note the cut-off date for advance purchase savings is October 24, 2015.
OTHER INFORMATION

MASS
Will be provided daily in the conference center, please refer to the program for schedule.

CONTINUING PROFESSIONAL EDUCATION UNITS – (CPES & CLE’S)
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.

For those who require CLE credits, there is a $75 fee. State and License number are required. We are seeking CLE credits for the following workshops: 9, 17, 20, 26; Portion of the Legal General Session and 4.75 hours for the Introduction to Management of Religious Institutes.
If you have questions, contact Sabrina Hidalgo, shidalgo@trcri.org or 301-587-7776.

CORT MEETINGS
Tables will be provided for CORT’s who wish to gather during Friday morning’s breakfast.

AUDIO TAPES AND WORKSHOP HANDOUTS
Audio Visual Management will provide audio and video taping of this years 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 301-587-7776 for more information.

EXHIBIT INFORMATION