RCRI
RESOURCE CENTER FOR RELIGIOUS INSTITUTES

2017 NATIONAL CONFERENCE

Changing Times: Challenges and Transitions

October 31 - November 3, 2017

Hyatt Regency St. Louis | St. Louis, Missouri

Welcome to the 2017 Annual RCRI Conference!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, I welcome you to the 2017 annual conference. We look forward to an enriching, enthusiastic, and enjoyable conference gathering in the shadow the Arch in St. Louis, Missouri.

With the generous assistance of the 2017 Conference Planning Committee, we have developed a wide-ranging program covering topics you have suggested as well as workshops that we hope will assist you in planning for the future of your institutes.

This year's conference theme is *Changing Times: Challenges and Transitions*, times that call for knowledge and wisdom in connecting people with one another, gathering information and identifying resources. While change can at times occur quickly, transition usually takes place more slowly. Pope Francis, in his homily at Mass in Casa Santa Marta on October 23, 2015, says "Times are changing, and we Christians must change continuously…while remaining steadfast in our faith in Jesus Christ, in the truth of the Gospel, but moving forward according to the signs of the times…" Addressing challenges and transitions in changing times in *Joy of the Gospel*, Pope Francis urges us "be realists, but without losing our joy, our boldness and our hope-filled commitment" (n. 109).

Among the highlights of the 2017 conference will be the address by our keynote speaker, Dr. Carolyn Woo, former president and CEO of Catholic Relief Services, on Wednesday morning, November 1. Prior to the opening of the conference on Tuesday evening October 31, we will offer three pre-conference workshops: a morning session on *Patrimony*; an afternoon session on *Legal Overview for Religious Institutes 2017*; and an afternoon session on *TRENDS for Beginners/Refresher for Users*.

We have scheduled 40 workshops. This year we have also included a track on Eldercare sponsored by NRRO. The Eldercare workshops are numbers: 6, 12, 17, 23, 28 & 39. On Thursday afternoon, November 2, a conference liturgy will be celebrated for all participants.

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

Sincerely,

S. Sharon Euart, RSM

Sr. Sharon Euart, RSM
Executive Director

Conference Schedule

TUESDAY, OCTOBER 31

9:00 AM – 12:30 PM	**PRE-CONFERENCE: Patrimony – Donna Miller** Registration Fee: $150, continental breakfast included.
1:30 PM – 4:30 PM	**PRE-CONFERENCE: Legal Overview for Religious Institutes in 2017 – Michael Airdo** Registration Fee: $150
9:00 AM – 12:30 PM	**PRE-CONFERENCE: TRENDS for Beginners/Refresher for Users – Sr. Hertha Longo, CSA & Br. Larry Lundin, SJ** Registration Fee: $150, continental breakfast included. *If you register for both a morning and afternoon session, continental breakfast and lunch will be provided.
3:00 PM	**ATTENDEE CHECK-IN / EXHIBITS OPEN**
5:30 PM	**OPENING AND PRAYER** **Welcome and Updates** – Sr. Lynn McKenzie, OSB, RCRI Board President; Sr. Sharon Euart, RSM, RCRI Executive Director; and Sr. Stephanie Still, PBVM, NRRO Executive Director
6:30 PM	**RECEPTION**

WEDNESDAY, NOVEMBER 1

7:00 AM	**EUCHARIST**
7:30 AM	**BREAKFAST/EXHIBIT HALL**
8:30 AM	**PRAYER**
9:00 AM – 10:30 AM	**KEYNOTE ADDRESS – PLEASE DON'T LET PEOPLE FORGET US – Dr. Carolyn Yauyan Woo, Former CEO and President, Catholic Relief Services; Distinguished President's Fellow for Global Development, Purdue University**
10:30 AM	**BREAK**

11:00 AM – 12:30 PM	**SESSION 1**

1. **Introduction to Accounting Software for Religious Institutes** – Philip Isacco & Matt Wade
2. **Using TRENDS for Property Planning** – Joseph Scott
3. **Board Development of Governing and Advisory Boards for Religious Institutes** – Bro. Michael Quirk, FSC
4. **Impact Investing: Isn't that what Religious Communities have always been doing? What's new today?** – Sr. Corinne Florek, OP, Jeannine Jacokes, Terry Ratigan, Darrin Williams & Karen Seabury
5. **We are all aging...Seven phases of community life** – Sr. Shaun Vergauwen, FSE
6. **Beginning the Journey Early Enough** – Sr. Gladys Guenther, SHF, Sr. Ann Lacour, MSC, Ray Mattes, IHM, Sr. Fran Raia, CPPS & Sr. Corinne Weiss, SJ

12:30 PM – 2:00 PM	**CORT LUNCH BUFFET**
2:00 PM – 3:30 PM	**SESSION 2**

7. **Advanced Topics in Accounting** – Adam Counts, Sue Novak & Kellie Ray Goines
8. ***Vultum Dei Quaerere:* Pope Francis's New Norms for Contemplative Monasteries of Nuns** – Sr. Nancy Bauer, OSB, JCD
9. **Protecting the Vulnerable** – Top Ten Tips for Policy Development and Action – Mark Chopko
10. **Trends in Information Technology Usage for Religious Institutes** – Tom Drez
11. **Grace Under Fire: Communicating During a Crisis** – Debbi Della Porta, Sr. Annmarie Sanders, IHM & Sr. Patricia Vetrano, RSM
12. **Approaching Dementia Another Way: Non-medical approaches to supporting people with dementia** – Dayna Larson-Hurst

3:30 PM	**BREAK**

4:00 PM – 5:30 PM

SESSION 3

13. **Navigating Uncertain Markets** – Peter Lazaroff
14. **Human Resource Trends and Special Challenges for a Religious Congregation** – Mary Kessler
15. **Focus on Fraud: Prevention and Detection Measures for Religious Organizations** – Amy Altholz & Christina Solomon
16. **Living Will: A Community's Legacy Planning** – Sr. Amy Hereford, CSJ
17. **Navigating the Care Continuum: Who? How? When? What?** – Catherine Keevey & Dayna Larson-Hurst

FREE EVENING

THURSDAY, NOVEMBER 2

7:30 AM — **BREAKFAST/EXHIBIT HALL**

8:30 AM — **PRAYER**

9:00 AM – 10:30 AM — **SESSION 4**

18. **The Church Unconscious: Discerning the Hidden Motives and Expectations of Congregations** – Fr. David Couturier, OFM Cap.
19. **Trusts, Corporate Structures and Religious Institutes Approaching Completion of the Mission** – Ken Alderfer & Mark MacDougall
20. **Child Sexual Exploitation Online: Combating the Epidemic, Trends in Victimization, and the Intersect with Pornography** – Ernie Allen, Mary Leary & Tracey Rembert
21. **Winners and Losers in the Healthcare Industry Under a New Presidency** – Sr. Geraldine Hoyler, CSC
22. **Advanced Topics in Accounting - REPEAT of Workshop 7**
23. **Eldercare: Leadership's Role** – Sr. Susan Schorsten, HM

10:30 AM — **BREAK**

11:00 AM – 12:30 PM — **SESSION 5**

24. **Government Benefits Update - 2017-2018** – Constance Neeson
25. **Making Staff Reductions Consistent with Gospel Values** – Bethany Jaeger
26. **Social Media & the Member of the Religious Institute as an Internet Persona** – Michael Airdo
27. **Cross-Border Philanthropy, a "How-To" Guide** – Laura Solomon, Esq.
28. **Creating a Supportive Environment for Our Elders** – Sr. Paula Cooney, IHM

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

2:00 PM – 3:30 PM **SESSION 6**

29. **Stewarding Mission in Transformative Ways** – Sr. Georgette Lehmuth, OSF
30. **Cyber Threats and Basic Security: Planning for Protection and Insurance Issues** – Craig Blackman & Jana Landon
31. **Brave New World for International Religious Workers in the U.S.** – Minyoung Ohm
32. **A Model for Collaboration in Governance and Management of Religious Congregations** – Sr. Pat Cormack, SCSC & Sr. Theresa Sandok, OSM
33. **Human Resource Trends and Special Challenges for a Religious Congregation** – Mary Kessler (REPEAT OF WORKSHOP 14)
34. **Process Addiction: The New Kid on the Block** – Sr. Mary Ellen Merrick, IHM

3:30 PM **BREAK**

3:45 PM – 5:15 PM **SESSION 7**

35. **Ministry in the Digital Age: Healthy Social Media & Internet Use** – Dr. Emily R. Cash
36. **Neighboring A New — The Congregation of St. Joseph's Story of Prayer, Planning, and Action** – Jerry Carley, Sr. Nancy Conway, CSJ, Pat Del Ponte & Sr. Marguerite O'Brien, CSJ
37. **Navigating Governance and Sponsorship** – Sr. Kelly Connors, pm
38. **Generating Investment Income While Sustaining the Catholic Church's Social Mission** – Sr. Pat Daly, OP, Ed Gerardo, Sr. Leora Linnenkugel, OLVM & James Malone
39. **Letting the Spirit Guide You - Spirituality for the Journey of Aging** – Sr. Paula Cooney, IHM & Sr. Susan Schrosten, HM

5:30 PM **CONFERENCE LITURGY**

FREE EVENING

FRIDAY, NOVEMBER 3

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

9:00 AM – 10:30 AM **SESSION 8**

40. **Legal Update** – Donna Miller

Detailed Descriptions

TUESDAY, OCTOBER 31

9:00 AM – 12:30 PM

PRE-CONFERENCE: PATRIMONY – DONNA MILLER

Patrimony is the most popular subject for discussion when members call the RCRI office. Questions about what it is, whether members can use it for themselves and/or give it away, and how patrimony can affect eligibility for public benefits are the frequent focus of what we are asked. Does your institute or society have policies on patrimony? Do your members review their Last Wills to ensure that they are up-to-date regularly? Should a member's pension be considered patrimony or income to the institute? Join us for this presentation where we will explore some basic understandings regarding patrimony and look at some common scenarios that arise as members and leadership navigate the sometimes turbulent waters surrounding patrimony.

Registration Fee: $150, continental breakfast included.

1:30 PM – 4:30 PM

PRE-CONFERENCE: LEGAL OVERVIEW FOR RELIGIOUS INSTITUTES IN 2017 – MICHAEL AIRDO

The civil legal landscape is constantly shifting and growing more complex for all people and all organizations in the United States, and this reality is especially true for religious institutes. This workshop will analyze common civil legal issues that all leaders and administrators face, but will do so through the unique lens of the religious order. It will focus on the ever-increasing liability exposures faced by religious institutes and their sponsored ministries, including risks created by employees and volunteers and by property. Michael Airdo will give special attention to employment law issues and provide guidance on how to safely navigate the statutory "protections" available to religious employers. Using his experience from the front-lines of the court room to the discussions in the board room, Airdo will identify the pitfalls for the unwary and provide practical advice to those in leadership.

Registration Fee: $150

9:00 AM – 12:30 PM

PRE-CONFERENCE: TRENDS FOR BEGINNERS/REFRESHER FOR USERS – SR. HERTHA LONGO, CSA & BR. 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. 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.

Registration Fee: $150, continental breakfast included.

**If you register for both a morning and afternoon session, continental breakfast and lunch will be provided.*

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

5:30 PM **OPENING AND PRAYER**

Welcome and Updates – Sr. Lynn McKenzie, OSB, RCRI Board President

Sr. Sharon Euart, RSM, RCRI Executive Director; and

Sr. Stephanie Still, PBVM, NRRO Executive Director

6:30 PM **RECEPTION**

WEDNESDAY, NOVEMBER 1

7:00 AM **EUCHARIST**

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

8:30 AM **PRAYER**

9:00 AM – 10:30 AM **KEYNOTE ADDRESS – PLEASE DON'T LET PEOPLE FORGET US**

Dr. Carolyn Yauyan Woo, Former CEO and President, Catholic Relief Services; Distinguished President's Fellow for Global Development, Purdue University

The most frequent plea we hear from our beneficiaries around the world is "please don't let people forget us." These include families trapped in war zones; those who lost their crops to shifting weather and drought from climate warming; parents who watch their children die from starvation; or youth targeted by gangs. This talk recounts how Catholic Relief Services reaches out to the poorest and most vulnerable to rebuild lives and restore hope. It challenges common perceptions that aid does not work and showcases examples of dramatic progress in reducing poverty and improving the quality of life. We will learn how the approach of Integral Human Development, built upon the principles of Catholic Social Teachings, provides the framework for serving the whole person and lifting up entire communities. While knowing God's teachings is important, it is not sufficient unless we also cultivate a sense of the presence of God. This talk concludes on the journey of faith from meeting God in others as we stand at the foot of their crosses.

Dr. Carolyn Yauyan Woo

Dr. Carolyn Y. Woo served as President & CEO of Catholic Relief Services, the official international humanitarian agency of the Catholic community in the United States, from 2012 to 2016.

Before coming to CRS, Carolyn served from 1997 to 2011 as dean of the University of Notre Dame's Mendoza College of Business. During her tenure, the Mendoza College was frequently recognized as the nation's leading business school in ethics education and research. Prior to the University of Notre Dame, Carolyn served as associate executive vice president for academic affairs at Purdue University.

Carolyn was born and raised in Hong Kong, and immigrated to the United States to attend Purdue University, where she received her bachelor's, master's and doctorate degrees, and joined the faculty. Her many academic and administrative recognitions include distinguished alumna and honorary alumna by Purdue University and University of Notre Dame, as well as the conferral of honorary doctorates from Providence College, Loyola University of Maryland, Manhattan College, Wake Forest University, the University of Notre Dame and others.

Carolyn was the first female dean to chair the accreditation body for business schools—AACSB: Association to Advance Collegiate Schools of Business—and directed its Peace Through Commerce initiative. She helped launch the Principles for Responsible Management Education for the United Nations Global Compact.

From 2004 to 2010, Carolyn served on the Board of Directors of CRS. Her current board service includes Aileron Foundation; Catholic University of America; Archdiocese of Baltimore Independent Child Abuse Review Board; Migration & Refugee Services, United States Conference of Catholic Bishops; and the International Policy Committee, United States of Conference of Catholic Bishops.

Carolyn was one of five presenters in Rome at the release of Pope Francis' encyclical on the environment in June 2015. Her faith journey and work at CRS are recounted in her book, Working for a Better World, published in 2015 by Our Sunday Visitor.

Representing CRS, Carolyn was featured in the May/June 2013 issue of Foreign Policy as one of the 500 Most Powerful people on the planet and one of only 33 in the category of "a force for good." Carolyn's Catholic News Service monthly column took first place in the 2013 Catholic Press Association Awards in the category of Best Regular Column—Spiritual Life.

10:30 AM **BREAK**

11:00 – 12:30 **SESSION 1**

1. **Introduction to Accounting Software for Religious Institutes** – Philip Isacco & Matt Wade

   This workshop is designed for treasurers who are giving consideration to their choice of accounting software. Many institutes utilize Intuit products such as QuickBooks but are unaware of the variety of QuickBooks products. The presentation will compare various QuickBooks products and discuss their effectiveness for non-profit organizations such as religious institutes. The capabilities of a high-end product such as Abila MIP will also be examined, as well as tax preparation and fixed asset software.

2. **Using TRENDS for Property Planning** – Joseph Scott

   The workshop will discuss using TRENDS to project the future use of the institute's current properties and strategic planning for the future needs of membership. The workshop will also discuss communication with membership to prepare them for future changes to properties and living arrangements. We will also discuss the costs of operating a facility as the number of residents decline.

3. **Board Development of Governing and Advisory Boards for Religious Institutes** – Bro. Michael Quirk, FSC

   There is no substitute for an informed, engaged and committed board. Cultivating quality board members can be a challenge. This workshop will focus on the characteristics of strong board members, how to attract, recruit and select these individuals and have them be fundraisers and friend-raisers for your organization. Determining mission and purpose, assessing board performance and ensuring effective organizational planning are a few of the items to be discussed.

4. **Impact Investing: Isn't that what Religious Communities have always been doing? What's new today?** – Sr. Corinne Florek, OP, Jeannine Jacokes, Terry Ratigan, Darrin Williams & Karen Seabury

   Impact investing is the new buzzword. Yet, religious communities have been investing with their values for decades. This panel will discuss high impact community investing. By the end of the workshop, the audience will have a greater understanding of current trends and community investment opportunities in the marketplace today.

   Moderated by Sister Corrine Florek, OP, Executive Director of the Religious Community Investment Fund, the panel is comprised of representatives from the Community Development Financial Institution industry.

5. **We are all aging...Seven phases of community life** – Sr. Shaun Vergauwen, FSE

   Aging is really a process of maturing. We do so individually, as a Community and through our community. As we look at seven phases in Community growth and personal maturing we can be in deeper union as we all age.

6. **Beginning the Journey Early Enough** – Sr. Gladys Guenther, SHF, Sr. Ann Lacour, MSC, Ray Mattes, IHM, Sr. Fran Raia, CPPS & Sr. Corinne Weiss, SJ

   Actual membership numbers within an institute may reveal only a partial picture of the institute's current and future reality whereas the median age of members may indicate the real possibility of historic completion.

The realities of an increased number of retired and infirm members and a shrinking pool of active members available for both internal and external ministry impact all levels of community life, finances, institutional sponsorship, property and legacy. Addressing these changing realities requires a commitment of resources, engagement of membership, time and a considerable amount of planning. This workshop will focus on the key indicators to consider in planning for the next phase of an institute's life. Panel members representing congregations that are actively engaged in future planning will share their insights and experiences on questions such as: When does a community begin to realistically address the issues around the possibility of historic completion? Where does a community start? What factors serve as indicators that such discussions are necessary for informed decision making? What, if any, timeframe should be considered?

12:30 PM – 2:00 PM **CORT LUNCH BUFFET**

2:00 PM – 3:30 PM **SESSION 2**

7. **Advanced Topics in Accounting** – Adam Counts, Sue Novak & Kellie Ray Goines

   Presentation will include discussions related to Variations in Accounting and Reporting. New and Emerging Issues (for example): Not-For-Profit Financial Reporting, Leases, Revenue Recognition, Other New Standards. Challenges (for example): Contributed Use of Facilities, Straight Line Leases, Below Market Leases, Identifying Restricted Revenue, Lawsuit Liabilities, Imputed Interest, Charitable Trusts, Alternative Investments, Reporting Entity, Related Parties and Consolidations, Online Banking, Tax Implications of Alternative Investments. Intended Audience: 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.

8. ***Vultum Dei Quaerere:* Pope Francis's New Norms for Contemplative Monasteries of Nuns** – Sr. Nancy Bauer, OSB, JCD

   In June 2016, Pope Francis issued the first new papal legislation on contemplative nuns since Pope Pius XII promulgated Sponsa Christi in 1950. In his apostolic constitution *Vultum Dei Quaerere*, Pope Francis addresses twelve "matters calling for discernment and renewed norms": formation, prayer, the word of God, the sacraments of Eucharist and Reconciliation, community life, autonomy, federations, cloister, work, silence, communications media, and asceticism. The Pope provides a brief reflection on each of these topics and then provides new norms on each one. One of the most notable legislative changes introduced in *Vultum* is the requirement that the contemplative monasteries of women be joined together in federations. Vultum also describes a period of formation that is considerably longer than has usually been required by the monasteries and provides for greater freedom on the part of individual monasteries regarding cloister. This workshop will provide an overview of the new norms presented in Vultum Dei Quaerere, with greater emphasis on those that call for the most notable changes.

9. **Protecting the Vulnerable** – Top Ten Tips for Policy Development and Action – Mark Chopko

   The Workshop will deconstruct formulaic approaches to risk management and focus instead of evaluation and managing real risks. A PowerPoint will guide attendees through the steps in assessing what kind of policy to develop based on customized risk assessments, through the design, testing and implementation. Topics also will focus on training, checking backgrounds, and education of those served. A portion of the presentation will touch upon issues of response, basic media/crisis planning and learning from mistakes. The goal is to plan for strong performance that demonstrates the Church's commitment to protecting the vulnerable, including ill or aged adults.

10. **Trends in Information Technology Usage for Religious Institutes** – Tom Drez

    All Religious Institutes require a certain amount of information technology (IT) usage to be effective and efficient while serving the needs of its various audiences. IT itself is ever-changing and ever-evolving which means your Religious Institute could likely benefit by adopting a continuous improvement strategy to taking full advantage of all IT has to offer. This session will highlight current IT trends and news in areas including cybersecurity, cloud computing, mobility and more. Make sure you have the latest information to help your Religious Institute!

11. **Grace Under Fire: Communicating During a Crisis** – Debbi Della Porta, Sr. Annmarie Sanders, IHM & Sr. Patricia Vetrano, RSM

    Religious congregations can be hit with a crisis in an instant: a natural disaster, lawsuit, criminal investigation, even a lapse in judgment by a member or employee on social media. Hear from a religious life leader and a communicator who have experienced crises and what they learned about the pitfalls and opportunities of communicating internally and externally when your organization is undergoing a public crisis.

12. **Approaching Dementia Another Way: Non-medical approaches to supporting people with dementia** – Dayna Larson-Hurst

    What if there were other ways to support people living with dementia besides medication? We now know there are other "treatments" which can be effective without the side effects. Learn about the use of how the Montessori methods, Spaced Retrieval, Purposeful Activities and other modalities can enrich the lives and reduce the challenges experienced by those living with the dementia.

3:30 PM	**BREAK**
4:00 PM – 5:30 PM	**SESSION 3**

13. Navigating Uncertain Markets – Peter Lazaroff

The future is unknowable and there are risks inherent to that. Our success in managing those risks will determine our success in investing. It is extremely difficult to predict the outcomes of macroeconomic events and even more challenging to predict how those events will impact financial markets. Plancorp's CIO will outline the statistical building blocks for making better decisions along with investment strategies for approaching volatile and uncertain markets.

14. Human Resource Trends and Special Challenges for a Religious Congregation – Mary Kessler

As more non-congregational members are being hired by religious institutes, unique challenges have emerged. Social media is increasing as a recruitment tool. Succession plans are needed to replace current staff. New employees from the secular world require time to adapt to the unique culture of a religious organization. Employees are looking for new policies like telecommuting, flexible schedules and non-traditional benefits.

This session explores where trends are emerging and examines strategies for addressing these challenges.

15. Focus on Fraud: Prevention and Detection Measures for Religious Organizations – Amy Altholz & Christina Solomon

News stories about fraud and embezzlement at nonprofit organizations abound. Knowledge of common fraud schemes and strategies to implementing relatively simple, yet important processes, procedures, and policies will better prepare you, in the event your organization has to navigate this difficult situation.

Topics to be covered in this session include:

- Prevalence of Fraud and Recent Examples of Fraud
- Common Types of Fraud Schemes and Red Flags
- Preventive and Detective Internal Controls

16. Living Will: A Community's Legacy Planning – Sr. Amy Hereford, CSJ

Religious institutes that are coming to completion wish to ensure that their assets are used for their congregational needs, their historical ministries and their charism. We use terms like Living Will and Legacy Planning; what does this mean when applied to a religious institute? This workshop will explore:

1. A community's rights and obligations
2. Legacy planning and decision making

3. Civil and Canonical issues and planning tools
4. Practical application and examples

17. Navigating the Care Continuum: Who? How? When? What? – Catherine Keevey & Dayna Larson-Hurst

Determining the best path to providing care and services for our members is a growing need. Who will provide the service? How does Leadership determine if the services are adequate? When to access programs such as PACE, Home Health, Assisted Living/Nursing Home, etc. What do you look for to best meet your community's needs? During this workshop, we will offer a variety of suggestions to help you travel down this often-challenging path.

FREE EVENING

THURSDAY, NOVEMBER 2

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

8:30 AM **PRAYER**

9:00 AM – 10:30 AM **SESSION 4**

18. The Church Unconscious: Discerning the Hidden Motives and Expectations of Congregations – Fr. David Couturier, OFM Cap.

Congregational planning often falters because congregational leaders fail to assess and work through the "non-rational" side of their religious institutions. This workshop will introduce participants to socio-analysis, the discipline of organizational development that studies the unconscious processes, hidden conflicts, irrational behavior, and defenses against anxiety that block institutions from constructing a thriving future. The future of religious life may rest on the capacity of leaders to make sense of the unreasonable during their administration.

19. Trusts, Corporate Structures and Religious Institutes Approaching Completion of the Mission – Ken Alderfer & Mark MacDougall

Religious institutes considering the possible completion of their ministry have an important set of legal tools available to effectively manage this challenging process. Issues associated with declining membership, diminished leadership capacity, and reduced financial resources – as well as the long-term needs of sponsored works – create unique challenges to communities in transition. Congregations that are just beginning to formulate long-term plans, as well as those approaching completion in the near term, should carefully consider innovative civil structures that may be used to protect and hold temporal assets in a manner consistent with their ministry – even after the last member is no longer active. Grantor trusts, land trusts, conservation easements and non-profit corporations can be carefully assembled to ensure that financial assets and real property are invested, managed and used to reflect the charism and promote the long-term goals and hopes of the institute in transition. These civil legal structures provide extraordinary flexibility and may be incorporated into covenant relationships, shared leadership agreements and other canonical structures. This workshop will use a fact-driven format, incorporating actual case studies, and will seek to actively engage participants to raise and discuss their own experiences and questions.

20. **Child Sexual Exploitation Online: Combating the Epidemic, Trends in Victimization, and the Intersect with Pornography** – Ernie Allen, Mary Leary & Tracey Rembert

    Child sex trafficking and online sexual abuse are proliferating at astounding speeds through new technologies and the Web. IT companies have stepped up with solutions, but has it been enough to combat the surging numbers of child victims? This panel presents a stark conversation about the realities of online child sexual abuse, how pornography intersects with key aspects, and the role investors can play in halting the rising numbers of victims.

21. **Winners and Losers in the Healthcare Industry Under a New Presidency** – Sr. Geraldine Hoyler, CSC

    With much about the new administration's healthcare agenda still unclear, this seminar is focused on discussing the changes made to the healthcare financing and insurance during the first six months of a new presidency, as well as changes that may still come. Sister Geraldine Hoyler will speak in detail about updates, changes and trends to health coverages, specifically focused on members of religious institutes. This seminar will end with an open discussion and question and answer segment, which will help members garner a basic understanding of the changes and their impact.

22. **Advanced Topics in Accounting - REPEAT of Workshop 7**

23. **Eldercare: Leadership's Role** – Sr. Susan Schorsten, HM

    One of the challenges facing Leaders today is how "best" to address the needs of our elder members. As we all age we need to take the time to engage with the aging process. We will explore our own thoughts, feelings and attitudes about aging. Flowing from our self-knowledge, we will explore how we, as leaders, are called to work with our sisters and brothers.

10:30 AM **BREAK**

11:00 AM – 12:30 PM **SESSION 5**

24. **Government Benefits Update - 2017-2018** – Constance Neeson

    This workshop will cover the latest changes in government benefit programs for 2017, with a look ahead to pending changes for 2018. 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 legislation on benefit participation for members of religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order in managing ongoing participation in government programs.

25. **Making Staff Reductions Consistent with Gospel Values** – Bethany Jaeger

    There is no authoritative data source to help religious communities identify the most appropriate staffing levels for health care, maintenance, administration and other essential functions. This workshop will provide comparative data gathered through a survey and supplemented by conversations with members of leadership to identify gentle, best practices for downsizing staffing levels when that becomes necessary. We will also discuss common avoidance measures and methods to apply justice when meeting the financial imperative of communities.

26. **Social Media & the Member of the Religious Institute as an Internet Persona** – Michael Airdo

    Facebook. Instagram. Snapchat. Social media is now a part of the fabric of America. Many legal issues arise from social media, and the phenomenon has expanded to not only the religious institute, but to its members as well. This workshop focuses on various legal issues that arise with members' use of social media, managing negative social media exposure created by the member, and recommended policies and procedures available to handle member-created social media issues.

27. **Cross-Border Philanthropy, a "How-To" Guide** – Laura Solomon, Esq.

    Does your Ministry work abroad? International work is critical to your religious mission, but you need to know about the laws and best practices that apply. Join Laura Solomon, Esq. to learn about: tax laws and regulations, Anti-Terrorist Financing Guidelines, the Office of Foreign Asset Controls and SDN list, FBAR Rules, and FATF's Recommendation 8. Laura will use engaging case studies and provide user-friendly resources, including a "How-To" Guide, so you can navigate these complicated rules with confidence.

28. **Creating a Supportive Environment for Our Elders** – Sr. Paula Cooney, IHM

    When we think of environment we usually limit ourselves to the space around us whether it is the natural world outside the walls or the physical space within them. Although important, a supportive environment is made up much more. In this workshop the participants will explore three areas of the environment that impact the well-being of our elders: the physical, personal and operational and discover ways to enhance each one.

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

2:00 PM – 3:30 PM **SESSION 6**

29. Stewarding Mission in Transformative Ways – Sr. Georgette Lehmuth, OSF

The primary purpose of any resource development program is mission advancement.

This session will:

- talk about the importance of understanding an institute's mission equity
- explore developing a culture of mission and philanthropy in a religious institute
- offer attendees some benchmarks to measure effectiveness
- identify key reasons why others will choose to invest in a religious institute
- address appropriate stewardship of the relationship between the donor and the mission
- building partnership to create a viable future or legacy for mission.

30. Cyber Threats and Basic Security: Planning for Protection and Insurance Issues – Craig Blackman & Jana Landon

Everyone has heard about the data breaches at Home Depot and Target and even of health insurance and related information. As the "big players" have ramped up security, cyber thieves have set their sights on more vulnerable targets – small to mid-size businesses that deal with customers through the Internet. As religious institutions shift fund-raising strategy to the Internet, they are as vulnerable as any other entity soliciting monetary gifts online. This workshop covers the basics – from identifying and quantifying the threat, to understanding the implications, to building a cost-effective management plan, and finally to insurance for any losses.

31. Brave New World for International Religious Workers in the U.S. – Minyoung Ohm

This workshop will discuss the impact of the new administration's immigration policies to the R-1 religious worker visa program. The discussion topics will include executive orders, non-minister sunset provision, site visits, travel issues, undocumented religious workers, and more. We will also examine other visas such as tourist visas and student visas that are used by international religious workers and how they are different from R-1 visas.

32. A Model for Collaboration in Governance and Management of Religious Congregations – Sr. Pat Cormack, SCSC & Sr. Theresa Sandok, OSM

The presenters will share the story of the development of the Wisconsin Religious Collaborative, whose purpose is to promote good stewardship by sharing resources and professional expertise in order to sustain mission and meet needs. The WRC, still in its formative stage, is a project of the fourteen religious institutes that make up LCWR Region 9. Several of these institutes are in their last generation, and all of them are seeking more efficient ways to steward their financial and human resources.

33. **Human Resource Trends and Special Challenges for a Religious Congregation** – Mary Kessler (**REPEAT OF WORKSHOP 14**)

34. **Process Addiction: The New Kid on the Block** – Sr. Mary Ellen Merrick, IHM

    The American Society for Addiction Medicine (ASAM) in 2011 included in its definition an area commonly referred to as "process or behavioral addictions." Things like gambling, shopping, credit card spending, hoarding, and work are some examples. Basically good things in themselves, but, for some people. Can have the same brain response as alcohol or other chemicals that are ingested. These issues are showing up among vowed and ordained individuals in many parts of the country. This workshop will assist leaders with identifying signs and symptoms of these processes and offer ways to help members understand and address them in their lives.

3:30 PM **BREAK**

3:45 PM – 5:15 PM **SESSION 7**

35. **Ministry in the Digital Age: Healthy Social Media & Internet Use** – Dr. Emily R. Cash

    Ministry today requires using technology – for work, play and even evangelization. But in an increasingly connected and "plugged-in" world, many of us struggle with how to maintain healthy boundaries – both in how we represent ourselves and communicate online, and in how much time we spend using digital media. Dr. Emily Cash, Psy.D., explores the impact of misusing the Internet and social media on individual and community life and offers practical suggestions for healthy Internet use.

36. **Neighboring A New — The Congregation of St. Joseph's Story of Prayer, Planning, and Action** – Jerry Carley, Sr. Nancy Conway, CSJ, Pat Del Ponte & Sr. Marguerite O'Brien, CSJ

    We'll recount the Congregation of St. Joseph's journey to a unified path for their 500+ sisters nationwide. Hear how CSJ created and utilized a Directional Statement that played a critical role in the near-unanimous alignment of seven formerly independent communities. Learn about their challenges, options—merging locations, closing centers/motherhouses, uprooting sisters—and the creative solution they developed which ensures their sisters' care and the management of their properties through the unique lens of religious life.

37. **Navigating Governance and Sponsorship** – Sr. Kelly Connors, pm

    This workshop will clarify the prophetic role of the Sponsor and how it relates to the ministry of governance that is carried out by the various

Boards, along with the fiduciary responsibilities. Different examples of governance structures and sponsorship models currently in use for various "Sponsored Ministries" will be presented; the importance of role clarity and resources for effective sponsorship and governance will be highlighted.

38. Generating Investment Income While Sustaining the Catholic Church's Social Mission – Sr. Pat Daly, OP, Ed Gerardo, Sr. Leora Linnenkugel, OLVM & James Malone

The investment committee of a religious organization looks to generate income as one of their core functions. Tie in the organization's passion for maximizing returns without compromising core tenets of its shared faith and you have a mission with two primary objectives: income and impact. Finding opportunities that combine these two purposes may seem challenging but it can be easier than you think. This panel will explore products available across asset classes that religious organizations can use to look to satisfy the need for income while investing according to their faith and mission. The goal of this panel is to provide real world investment examples revealing how these impact investments are providing religious organizations the income they need while sustaining the Catholic Church's social mission. This follows the Pope's call for impact investments that respond to social and environmental challenges.

39. Letting the Spirit Guide You – Spirituality for the Journey of Aging - Sr. Paula Cooney, IHM & Sr. Susan Schrosten, HM

Aging is a journey – sometimes experienced as gift – sometimes as challenge – often as both and as a journey only taken once. What keeps us well? What nourishes us and sustains us as we navigate these elder years? During our time together, we will explore the attitudes, supports, and resources that are part of healthy aging – emotionally, relationally, spiritually.

5:30 PM — **CONFERENCE LITURGY**

FREE EVENING

FRIDAY, NOVEMBER 3

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

9:00 AM – 10:30 AM — **SESSION 8**

40. Legal Update – Donna Miller

This workshop session will include updates on some of the current and emerging legal issues affecting religious institutes. As well as updates on the website and Toolbox.

Speakers

Michael A. Airdo is a founding partner of the law firm of Kopon Airdo, LLC in Chicago, Illinois. Through his work with the Christian Brothers Services on a national level, he has a broad base of experience in representing the unique legal needs of religious institutes and religiously-sponsored ministries. Mr. Airdo's area of practice focuses on complex litigation including matters concerning premises liability, wrongful termination, discrimination, and harassment, and other personal injury disputes. Mr. Airdo also specializes in counseling on legal matters involving not-for profit corporations, educational institutes, small businesses, and mental health professionals. He has a wide array of experience in resolving matters through both litigation and the alternative dispute resolution process.

Ken Alderfer is a senior counsel in the Washington, D.C. office of Akin Gump Strauss Hauer & Feld, LLP and a recognized expert in charitable law and tax-exempt organizations. Mr. Alderfer has practiced with Akin Gump for more than thirty years and represents numerous religious institutes and associated non-profit organizations. He is a member of the Exempt Organizations Committee of the Tax Section of the American Bar Association and regularly speaks on corporate and tax aspects of operations and investments by tax-exempt organizations.

Ernie Allen is a global expert on child abduction, sexual exploitation, human trafficking, the "Dark Web" and public-private partnerships. He speaks to global audiences and advises governments, law enforcement, technology companies and nonprofit organizations. He currently chairs a global effort created in 2015 by UK Prime Minister David Cameron to combat online child abuse. Previously as President of the National Center for Missing & Exploited Children and the International Centre for Missing & Exploited Children, he created the national Missing Children's hotline; the CyberTipline to report sexual exploitation; and brought forensic services to law enforcement. Over 180,000 missing children were found and the recovery rate increased from 62% to 97%. He led efforts to implement new global policies on virtual currencies and the anonymous "Dark Web"; created new technologies to address child victimization; reduced a $30 million child pornography industry to zero; and addressed child victimization as a public health crisis. His work has been widely recognized and he is the recipient of numerous awards. He was called "one of America's foremost social entrepreneurs" by President George W. Bush, named "Executive of the Year" by NonProfit Times and named one of the "Most Influential People in Security" by Security Magazine.

Amy Altholz is a Partner in RubinBrown's Not-For-Profit and Assurance Services Groups. She is also the Vice Chair of the Not-For-Profit Services Group. Her experience with a variety of not-for-profit clients provides her valuable insight into the industry's best practices. While working for RubinBrown, Amy has participated in the Baker Tilly International Exchange Program, working for Sofideec Baker Tilly in Paris, France. Amy has a M.S.B.A., in Accounting, Washington University in St. Louis and a B.S., in Accounting, Finance and Management, Washington University in St. Louis.

Sister Nancy Bauer, OSB, JCD is a member and former prioress of the Sisters of Saint Benedict of Saint Benedict's Monastery in St. Joseph, Minnesota. She holds a master's degree in theology with an emphasis in monastic studies from the School of Theology at St. John's University, Collegeville, Minnesota. She earned the licentiate and doctorate in canon law at The Catholic University of America in Washington, D.C. where she is now an assistant professor of canon law specializing in consecrated life.

Craig Blackman is a nationally recognized authority on the National Flood Insurance Program, and focuses his practice on a variety of insurance industry issues, including commercial and personal lines; cyber; directors & officers and errors & omissions; general liability; land title; fidelity and surety; and professional, employment and products liability. He has counseled clients on primary, umbrella, excess policies and reinsurance, as well as captive, self-insured and surplus lines programs; and proof of claim/coverage analyses in receivership. He also is a member of the firm's nonprofit & religious organizations practice group, representing nonprofit companies and related individuals regarding insurance needs of such entities and their boards, as well as the firm's Cyber/Privacy practice group.

Jerry Carley has been the President and Chief Executive Officer of CSJ Initiatives since 2014. He is responsible for the repositioning of the Congregation of St. Joseph's Centers and programs as well as developing and managing contract services with other senior services providers and Congregations. Carley's career in senior services administration spans over 25 years. He previously worked as the President and CEO of Via Christi Villages, Inc. He has also worked as the Divisional Director of Operations for Care Initiatives and as the Administrator of several facilities owned/managed by The Evangelical Lutheran Good Samaritan Society. He holds a bachelor's degree in Health Services from the University of South Dakota and a Master's in Financial Management from City University in Bellevue, Washington.

Dr. Emily R. Cash, Psy.D., Director, Saint Luke Center, is a licensed psychologist and a member of the clinical services department at Saint Luke Institute since 2006. She received her graduate degree in clinical psychology from Spalding University and completed her doctoral training in a community mental health setting in New York City. Her clinical services include individual and group therapy, psychological evaluation and assessment, and facilitation of psycho-educational groups for mental health and well-being. Dr. Cash is the director of the candidate assessment program for Saint Luke Institute and the director of Saint Luke Center, a ministry of Saint Luke Institute in Louisville, Kentucky. Her work includes evaluation and outpatient therapy services as well as educational workshops for a variety of religious institutes across the United States.

Mark E. Chopko, Esq., is a Partner and Chair of the Nonprofit & Religious Institutions practice group of Stradley, Ronon, Stevens & Young, LLP, in its Washington, D.C. office. He advises religious and nonprofit institutions, as well as business clients, across the United States, and from Europe and the Pacific Rim, on structural and risk management and avoidance issues and defending them in complex litigation. In addition to his legal practice, Mr. Chopko is an Adjunct Professor of Law at Georgetown University. He is a graduate of the Cornell Law School. From 1987-2007, he was General Counsel, United States Conference of Catholic Bishops, Washington, DC. Mr. Chopko is a frequent presenter and writer on legal issues affecting churches and nonprofits on a variety of topics, e.g., church-state affairs, education, biomedical issues, and liability issues. He has served the American Law Institute and was elected an honorary member of the Church Law Society of the Czech Republic.

Sr. Kelly Connors, pm, JCD, Ph.D., is Senior Director, Sponsor Services Catholic Health Association of the United States. Kelly is a member of the Sisters of Presentation of Mary of the United States Province. Kelly develops, implements and evaluates programs, services, and resources designed to support sponsors of Catholic health care in the United States, laity, religious, and bishops. As a canonist, she also works in cooperation with other service areas within CHA, providing research, development, education, and facilitation around forms of sponsorship preparing to meet future ministry needs. Prior to joining CHA, Kelly served as a canonical consultant to various dioceses and religious institutes. She has an extensive background in education, having taught at the secondary, undergraduate, and graduate levels.

Nancy Conway, CSJ, a native of Cleveland, entered the founding congregation in 1966. Her educational background includes a BA in Spanish, an MSSA in Social Work Administration, and a Ph.D. in Organizational Development. Nancy's ministry experience includes teaching at the high school level, social work, both in a hospital and at a women's agency, and five years of service on the Cleveland

Leadership Team. Nancy also has 28 years of experience in organizational consulting/facilitation. Most recently she was reelected to the Leadership Team of the Congregation of St. Joseph, a new institute formed from seven CSJ congregations in 2007. In her role, she has facilitated the congregation's movement regarding its buildings and properties across six states.

Sr. Paula Cooney, IHM is a member of the Sisters, Servants of the Immaculate Heart of Mary of Monroe, MI. (IHM). 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 13 years Paula has been an Eldercare Consultatant 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 a variety of topics pertaining to quality care and support for their members.

Sr. Patricia Cormack, SCSC currently serves as provincial of the USA province of the Sisters of Mercy of the Holy Cross based in Merrill WI. The international congregation is based in Switzerland. She also serves as chairperson of the Collaborative Project Working Group of LCWR Region 9. Sister Pat's background is religious education and organization development. She has served in parish and diocesan religious education positions, as well as in diocesan pastoral planning positions. She has served as provincial 2000-2006 and again from 2012 to the present. She served as Associate Director for Business and Finance for LCWR from 2007-2012. She is a current board member of RCRI.

Adam Counts, Associate – Not-for-Profit Services Group Plante & Moran, PLLC. Adam is an associate with more than 6 years of experience, who has served numerous not-for-profit and religious organizations in accounting, auditing, tax and management consulting. He is a member of the Firm's not-for-profit leadership team, with responsibility for planning and coordinating the firm's internal and external not-for-profit technical training. Adam has experience consulting with religious institutes and their sponsored ministries with respect to internal control design and implementation, finance office structure and reporting, and organizational best practices.

David B. Couturier, OFM Cap., is Dean of the School of Franciscan Studies and Executive Director of the Franciscan Institute at St. Bonaventure University. He also holds an appointment as the Dean R. Hoge Professor of Pastoral Planning and Church Management at the Graduate Theological Foundation. He teaches courses in Franciscan studies and organizational development. He is the author of Franciscans and their Finances: Economics in a Disenchanted World and The Four Conversions: A Spirituality of Transformation (www.franciscanpublications.com).

Sr. Patricia Daly is a Dominican Sister of Caldwell, NJ and has worked in Corporate Responsibility and Socially Responsible Investing for 40 years. She serves as the Director Emeritus of the Tri-State Coalition for Responsible Investment after 23 years as Executive Director. Pat is also the Corporate Responsibility Representative for the Sisters of St. Dominic of Caldwell, NJ. Pat received an Honorary Doctorate in Business Leadership from Duquesne University and an Honorary Doctor of Laws Degree from William Paterson University in 2003. Sister Pat is the recipient of the 2014 Joan Bavaria Award, presented by Ceres and Trillium Asset Management. Pat serves on the Advisory Board of the Lamont Doherty Earth Observatory at Columbia University and the Earth Council of the Dominican Sisters. She has lectured internationally and has been featured in a variety of news outlets.

Pat Del Ponte PE LEED® AP BD+C is Hoffman Planning, Design & Construction, Inc.'s Vice President of Planning Services. Over the course of 35 years, Pat has worked with more than 25 religious congregations across the country assisting them with their discernment and master planning efforts. He also provides extensive experience with land planning and approvals. A graduate of the Milwaukee School of Engineering with a Bachelor of Science in Architectural Engineering Technology, Pat is a professional engineer with Leadership in Energy and Environmental Design (LEED®) accreditation. Pat has presented at past RCRI National Conferences and has been published in the RCRI Bulletin.

Debbi Della Porta serves as director of communications for the Sisters of Mercy Mid-Atlantic Community. For the past twelve years, she has developed, implemented, and evaluated a comprehensive communications plan in conjunction with leadership to advance the mission of the Sisters of Mercy in Eastern Pennsylvania, New Jersey and the New York Area. During crises, Debbi serves as the primary media contact for the community. She has handled the communications regarding church issues such as the Apostolic Visitation, same sex marriage, closing of three schools, potential strikes, organizational changes and controversial sales of properties. Debbi holds a master's degree in professional communications and a bachelor's degree in journalism. A member of Communicators for Women Religious, Debbi served on their board for six years and presented best practices at three of their recent annual conferences.

Tom Drez, Chief Information Officer (CIO)/Chief Privacy Officer/Chief Security, Officer/Managing Director Information & Technology Services (ITS), 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, 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. He is also responsible for information protection, including privacy and security, for the entire organization. Mr. Drez holds a bachelor's degree in computer science from Lewis University, Romeoville, Illinois, and Certified Information Privacy Professional (CIPP) from the International Association of Privacy Professionals.

Sr. Corinne Florek, OP - Executive Director, Religious Communities Investment Fund with 27 Catholic women's religious congregations as members. Sister Corinne has worked more than 35 years in community economic development as a fund manager, educator, consultant, financial administrator and strategic planner. She also served as Director for the Mercy Partnership Fund, a program of Mercy Investment Services, Inc.; Interim Executive Director and Loan Fund Administrator for Women's Initiative for Self-Employment; Director of Alternative Investments for the Adrian Dominican Sisters Portfolio Advisory Board; Director of Economic Development programs for the Catholic Campaign for Human Development and the Manager of Kentucky Hills Industries, a craft cooperative in KY. She has served on numerous boards, and currently serves on the Mercy Loan Fund. Sister Corinne has a BA from Siena Heights College and an MBA from the University of Notre Dame.

Edward F. Gerardo, Bon Secours Health System, Inc., Director for Community Commitment and Social Investments. Mr. Gerardo oversees the community benefit functions of the health system, Bon Secours' community investment and grants programs, as well as outreach efforts in the communities of Bon Secours. For the past eight years, he has led the health system's efforts for healthy communities in vulnerable neighborhoods. In 2013 and 2016, he oversaw Community Health Needs Assessments for 14 Bon Secours hospitals. With Treasury Services of Bon Secours, he leads the system's Community Investment Program in communities served by Bon Secours Health System. Mr. Gerardo has been with Bon Secours for 27 years. Mr. Gerardo is a graduate from the University of

Virginia, and has Masters degrees from Boston College and Virginia Commonwealth University. He has served on the boards of not-for-profit organizations and is involved with church efforts for the people of Haiti.

Sr. Gladys Guenther, SHF is the past President of the Sisters of the Holy Family, a pontifical congregation founded in San Francisco, Californian in 1872. From 1987-1991 and 2003 – 2017 she served on leadership teams which were commissioned by their Chapters to make decisions about how the congregation would face the future. Decision areas included: finances, health care, care of the members, property sale and development, sponsored ministries, planning for a covenant relationship, and legacy. Prior to serving in congregational leadership, sister was the administrator of a priestless parish and director of faith formation in several parishes though out California.

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.

Sr. Geraldine Hoyler, CSC, C.P.A. Religious Institute Consultant, Christian Brothers Services. Sr. Geraldine, possesses an extensive background in hospital and system finance, property management and affordable family housing and governance. Since 2004, she has served as general councilor/general treasurer for the Congregation of the Sisters of the Holy Cross. Previously, Sister Geraldine served as senior vice president, finance and treasury, for Catholic Health Initiatives. Her prior positions included serving as president, Mercy Services Corporation, regional coordinator, Mercy Housing, Inc. and as a healthcare consultant. She also helped lead the development of Holy Cross Health System and served as the system's executive vice president and its first chief financial officer. Sister Geraldine served on the Board of Managers and chaired the Audit/Finance Committee of CHAN Healthcare Auditors and has served on numerous other boards. She earned a BSBA in accounting and an MSBA from the University of Denver. She is a certified public accountant (inactive) in the state of Indiana, a member of the American Institute of Certified Public Accountants and a Fellow of the Healthcare Financial Management Association (HFMA).

Philip Isacco, CPA is currently the Comptroller / Business Manager for the Marist Fathers & Brothers in Washington, DC. He has worked for the Marists since 2005. In addition to his work with the Marists, he owns a financial consulting firm where he works with non-profits, small businesses, and individuals on tax preparation, financial statement preparation, and financial planning. He holds an M.S. in Accounting and a B.A. in History from the University of Baltimore.

Jeannine Jacokes, Chief Executive Officer, Partners for the Common Good. Ms. Jacokes was appointed Executive Director of Partners for the Common Good in May 2001. During her tenure, she managed the transition of PCG from a limited partnership to an independent nonprofit organization. She has built the loan fund from a startup organization to a $12 million loan fund. She brings to PCG a wealth of experience working with Community Development Financial Institutions and banks across the United States. She served as a senior member of the management team at the U.S. Department of the Treasury's Community Development Financial Institutions (CDFI) Fund. She also served as a senior policy advisor at the U.S. Senate Committee on Banking, Housing and Urban Affairs where she played a key role in drafting many of the laws that currently govern the U.S. Department of Housing and Urban Development's programs.

Ms. Jacokes also served for two years at the U.S. Department of Housing and Urban Development.

Bethany Jaeger is a senior manager in the management consulting practice of KEB and is based in Springfield, Illinois. She has worked with religious institutes on a variety of strategic and operational planning processes since 2009. She works closely with leadership teams who must make difficult decisions to ensure the sustainability of their communities' missions and care of members into and through retirement. This includes designing and facilitating decision-making processes to help communities shape their preferred futures, improve their stewardship of material assets and assess their sponsored ministries. She also consults with leaders of public and nonprofit organizations in the areas of governance, policy, strategy and communications.

Catherine Keevey, BSN, MA has spent her professional career serving in direct care and administration in both home health and hospice care. More recently she has served as Health Care Coordinator for 10 years for the Society of the Holy Child Jesus until retirement. She continues to volunteer with the Holy Child Sisters on the health care center board and their strategic planning committee as well as the Congregation of the Passion planning group. She has served as a NRRO consultant since approximately 2002 and prior to that worked with the original Tri Conference to develop more comprehensive approach to Elder Care for Religious Communities.

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.

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.

Jana Landon co-chairs Stradley's Data Breach Response and Cyber Insurance teams. She is also founder and chair of the firm's E-Discovery Team. Her practice focuses on advising organizations of all sizes in multiple industry sectors on data breach response, data security and data management issues. Jana also provides regulatory compliance services and assists clients in policy/procedure preparation, tailored by the client's specific risks and governing laws. In the area of cyber insurance, Jana assists clients in evaluating coverage, determining whether existing coverage is sufficient, and proactively protecting data before an incident occurs. In the event of a data breach, she provides post-breach counseling regarding existing insurance coverage as well as any statutory notification requirements.

Dayna Larson-Hurst, RN, MSOD has worked in Catholic health care for the past 19 years. As a leader and consultant, she has a passion for devising innovative ways to help congregations develop and implement strategic-change initiatives that lead to the creation of life-giving communities. Much of her work now is focused on both well-being as we age and working with congregations to implement person-directed care particularly for those with dementia. She is currently an adjunct staff member with the NRRO as well as a consultant for Catholic religious congregations throughout the United States. Dayna is a registered nurse with a BA in Business and a Master's Degree in Organization Development.

Peter Lazaroff, CFA, CFP is the Co-Chief Investment Officer at Plancorp, which manages over $3.4 billion for institutions, individuals, and retirement plans. Peter plays a key role in developing and communicating the firm's investment strategy while also regularly writing for the Wall Street Journal, Forbes, and the CFA Institute. He has also appeared across a wide range of media sources including New York Times, Wall Street Journal, Barron's, Market Watch, CNN Money, and US News. Peter is both a CFA Charterholder (CFA) and Certified Financial Planner (CFP®). He holds a Bachelor of Arts in Economics and Management from DePauw University.

Mary Leary, Professor of Law, Catholic University of America. Mary Leary is a professor of law and a former prosecutor and attorney, focusing on crimes against women and children. She is also the former deputy director for the Office of Legal Counsel at the National Center for Missing and Exploited Children (NCMEC) and the former director of the National Center for the Prosecution of Child Abuse (NCPCA). She is an author and recognized expert in the areas of criminal law, victimization, exploitation, human trafficking, missing persons, technology, and the Fourth Amendment. She received her B.A. with honors from Georgetown University and earned her J.D. from the Georgetown University Law Center.

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. Sister has been named by the NonProfit Times as one of the "Top 50 Persons of Power and Influence" in the nonprofit sector nine times. 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 on 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.

Sr. Leora Linnenkugel, OLVM serves as general treasurer of Our Lady of Victory Missionary Sisters. She has a Bachelor of Science degree in Business Services from the University of Toledo, and a Master's degree in Theology from Catholic Theological Union in Chicago. Her ministry work has included Congregational Leadership, Religious Education Director and Director of Catechesis and Formation in Our Lady of the Desert in Apple Valley, Calif.; and Director and Treasurer for Julia Center in Chicago. She is also a member of Sisters and Brothers of Immigrants, an educational, pastoral and advocacy group of religious congregations working to improve the life of any immigrant in this country. She currently serves on boards and finance committees for OLVM, Religious Congregations Investment Funds (RCIF) and Julia Center, Inc. She has served on the LCWR Finance and Audit Committee and the USCCB Accounting Practices Committee.

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 RCRI'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 University New Orleans. He worked in Jesuit community administration for many years including five years at the Jesuit Conference (Office) in Washington. He completed 22 years as New Orleans Province treasurer in June 2012. He has worked with over 15 religious institutes on TRENDS and/or financial planning. This includes active and contemplative communities, men's and women's institutes.

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. 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.

James Malone, CFA is chief financial officer at Community Capital Management, Inc. (CCM). James is responsible for overseeing the firm's finance operations and financial reporting. He also spends time on business development with religious organizations and research platforms including broker-dealers, retirement plans, consultants, banks, and bank trust platforms. James serves on CCM's Board of Directors and is a member of the firm's Management Committee, Compliance Committee, and Valuation Committee. James joined CCM from Franklin Templeton where he was a vice president for the investment platform division responsible for business development with research platforms across multiple distribution channels. He also served as a senior product manager at Putnam Investments. He began his career as a Certified Public Accountant at PricewaterhouseCoopers. James received his B.S. in Finance and Accounting from Northeastern University. He is a CFA Charterholder and a member of the CFA Institute and the CFA Society of South Florida. He holds FINRA licenses: Series 7 & 63.

Ray Mattes, IHM 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.

Mary Ellen Merrick, IHM, is a member of the Sisters, Servants of the Immaculate Heart of Mary from Scranton, Pa. Sr. Mary Ellen has served in both the ministries of education since 1969 and behavioral health since 1983. It became an unexpected blessing when the two were able to be combined. A primary focus has been the area of addiction and how it contributes to the dysfunction of communal life. She has worked in facilities that are dedicated to assisting religious and clergy take their lives back from the lure of addictive illness. Presently, Mary Ellen is the Executive Director of the Women's Program at Guest House located in Lake Orion, MI.

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.

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 50 religious institutes. Over the past 17 years, over 300 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 religious about the scope of benefit programs which are available to all citizens.

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, finance office and internal control assessments, planning and operations. She has presented on technical accounting issues at RCRI, NATRI, LCWR, national, state, and firm not-for- profit education seminars.

Marguerite O'Brien, CSJ has spent most of her life in West Virginia – growing up, studying, entering the Wheeling congregation, and ministering there. Her undergraduate degree is in chemistry, and after a brief experience as a high school science teacher, she became a licensed Medical Technologist. She taught Med Tech students at Fairmont State College and Wheeling Jesuit University and spent 15 years there as a Resident Counselor. During these years, she also completed graduate studies in Clinical Chemistry at the Ohio State University and Liturgy at the University of Notre Dame. From 1989, Marguerite served in leadership in the Wheeling congregation. Most recently she was reelected to the Leadership Team of the Congregation of St. Joseph, a new institute formed from seven CSJ congregations in 2007. In her role on the leadership team, Marguerite has worked extensively with creating systems and processes to consolidate the congregation's material resources.

Minyoung Ohm, Esq. is a staff attorney at the Catholic Legal Immigration Network (CLINIC) in the Religious Immigration Services section. She joined CLINIC in 2008 and has been exclusively practicing religious immigration law. 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. She graduated from the American University's Washington College of Law and has a B.A. in English and French from Wellesley College. She is a member of the New York State Bar.

Br. Michael Quirk, FSC, Ed.D. is the President/CEO of Christian Brothers Services, a Lasallian enterprise which serves Catholic institutions and organizations by administering and managing employee health benefit and retirement plans, a religious health trust, institutional risk management services and school management consulting services. Prior to joining CBS, he was the president of De La Salle Institute, a co-institutional secondary school in Chicago for 20 years. He has also taught at the high school and university levels. Brother Quirk holds a MBA from Lewis University and a doctorate in Education from De Paul University. He presently serves on the boards of various Lasallian institutions. In addition, he is a member of the Church Alliance, the International Economic Council of the Christian Brothers and director of the Church Benefits Association. He is the former president of the Catholic United Investment Trust.

Sr. Fran Raia, CPPS, a Sister of the Most Precious Blood of O'Fallon Missouri, was a member of the leadership team from 2004-2010 and president from 2010-2016. Before coming to leadership she served as an elementary school teacher, parish minister, group facilitator, and campus minister. At the 2010 general chapter, the delegates mandated the new leadership team to address the question of accepting new vowed members. The questions included: "What crossroads are we facing in relation to new members;

how are we addressing the issue of vocations; what are our expectations of our associates (partners in mission)?" Fran's presentation will describe the steps the community experienced in moving from these questions to a decision about membership in 2012, and facing our completion as a congregation. This journey has been difficult and freeing.

Kellie Ray Goines, Partner – Not-for-Profit Services Group Plante & Moran, PLLC. Kellie is a partner with 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 religious organizations with respect to implementation of new auditing and accounting standards, reporting best practices, and internal control design and implementation. 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 serves as a presenter at, internal and external not-for-profit technical trainings and webinars.

Terry Ratigan, Consultant, National Federation of Community Development Credit Unions, is an independent consultant with specialized expertise in credit unions and community development finance. Since 2001 he has provided extensive consulting services to the National Federation of Community Development Credit Unions (Federation), individual credit unions, CDFI Loan Funds, the Department of Justice, the Department of Health and Human Services/Assets for Independence and others. Mr. Ratigan is a leading developer of statistical approaches to the analysis of credit union potential, performance, and community development impact. These include a statistical methodology to evaluate credit union activities in CDFI target markets and demonstrate eligibility for CDFI certification. In addition to research and writing, Mr. Ratigan created the Federation's CU Breakthrough consulting service and developed its suite of CDFI services; co-developed the Emerging Markets Review (EMR); developed the CU Capacity and Community Development; incorporated this index into the Community Development Profile. He holds a BA from the University of Virginia and MA in Public Policy from Harvard University.

Tracey Rembert, Assistant Director, Catholic Responsible Investing℠ for CBIS, joined CBIS in 2016 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. She has a successful track record of both U.S. and international corporate engagement on a range of sustainability issues, including climate change, responsible lending, governance, and labor issues. Prior to CBIS, she was director of Investor Programs at Ceres, mobilizing investors, companies and public interest groups to accelerate and expand the adoption of sustainable business practices. She also headed CERES' Investor Initiative for Sustainable Exchanges, a coalition of investors focused on engagement with stock exchanges to improve sustainability reporting standards globally. She worked at The Forum for Sustainable and Responsible Investment as head of its Shareholder Action Network, and at Pax World Funds, where she was their Governance and Engagement Officer. Ms. Rembert has authored several guides on shareholder advocacy, including co-publishing with BlackRock in 2015 a national guide for large institutional investors entitled 21st Century Engagement: Investor Strategies for Incorporating ESG Considerations into Corporate Interactions. Ms. Rembert holds an M.A. in English from Humboldt State University.

Sr. Annemarie Sanders, IHM serves as the director of communications for the Leadership Conference of Women Religious where she handled the internal and external communications during the Vatican's doctrinal assessment of LCWR, as well as on topics such as sexual abuse, healthcare reform, and more. She had previously worked in communications for her congregation (Sisters, Servants of the Immaculate

Heart of Mary in Scranton, Pennsylvania), Marywood College and in Peru for Latinamerica Press/Noticias Aliadas. She holds a bachelor of social work degree from Marywood College and a MA in public communications from Fordham University. She has authored several articles on religious life in America Magazine, Human Development, Review for Religious and other publications, and edited Spiritual Leadership for Challenging Times: Presidential Addresses of the Leadership Conference of Women Religious (Orbis Books, 2014) and Transformational Leadership: Conversations with the Leadership Conference of Women Religious (2015).

Sr. Theresa Sandok, OSM is president of the Servants of Mary (Servite Sisters), a diocesan institute based in Ladysmith, WI, and is chairperson of LCWR Region 9. She holds a PhD in philosophy from the University of Notre Dame and has taught philosophy at St. Catherine University, Saint Paul, MN, and Bellarmine University, Louisville, KY, where she also served as Dean of the College of Arts & Sciences and director of Bellarmine's Thomas Merton Center. She serves on the board of the International Thomas Merton Society and the Leadership Conference of Women Religious.

Sr. Susan Schorsten, HM is a member of the Sisters of the Humility of Mary of Villa Maria, PA. She has served in various ministries including nursing, health care administration, diocesan social ministry, Community Leadership, retreat ministry, facilitation and consultation. She has also served as a NRRO consultant for both eldercare and planning and implementation for multiple religious congregations of both women and men. She is currently involved with retreat ministry in South Carolina. She is a frequent speaker for religious communities on aging and eldercare and the spirituality of aging.

Joseph Scott is the Finance Director for Dominican Sisters of Peace. In his role he leads the financial functions, long term financial planning and property planning for the institute. He began his career with the Dominican Sisters in 2006 as the Finance Director of Dominican Sisters, St. Mary of the Springs. The Dominican Sisters of Peace was formed in 2009 from the merger of seven Dominican Congregations and Joe coordinated the financial aspects of the merger. Prior to his employment with the Dominicans, Joe was the Director of Investment Management at Paramount Financial Group, a subsidiary of GMAC (now Ally Financial). Joe also spent several years as an auditor at a public accounting firm. Joe is a Certified Public Account licensed to practice in Ohio, a member of the American Institute of Public Accountants and the Ohio Society of Certified Public Accountants. He currently serves on the Board of Directors for the Resource Center for Religious Institutes and the Christian Brothers Services Religious Medical Trust.

Karen Seabury, Executive Vice President, Director of Ratings Aeris. Karen joined Aeris as its Director of Ratings in May 2013 after a decade as an independent consultant in community development finance. Her consulting practice included strategy development for program-related investment (PRI) and grant programs and financial and program analysis of PRI investments and grant candidates. Her investment and grant experience covers community development finance institutions, affordable housing and commercial real estate developers, environmental businesses and funds, and child care and other community facilities. Karen is skilled in financial model development, risk rating systems, and business planning for community development lenders and other community development organizations. Prior to her consulting career, Karen worked as a Program Officer at the MacArthur Foundation and Director of Finance and Lending at the Illinois Facilities Fund. Karen received her MBA from The Wharton School at the University of Pennsylvania and her BS from Miami University of Ohio.

Christina Solomon is a Partner in RubinBrown's Business Advisory Services Group. As a financial forensics expert, she performs forensic accounting analysis and fraud investigations. She has provided financial consultation to businesses in a variety of industries, including manufacturing and distribution, professional service firms, healthcare, environmental and not-for-profit organizations. Christina's consulting services include developing financial analyses, quantifying damages, writing reports and providing deposition and trial testimonies. In addition, she has internal audit, financial modeling and data analysis experience. She holds a B.S. in Accounting, University of Missouri – Columbia.

Laura N. Solomon, Esq. is the founder of Laura Solomon & Associates, a law firm devoted to the representation of nonprofit, charitable, and other tax-exempt organizations and philanthropic planning for individuals. Ms. Solomon and her associates serve as outside, general counsel to hundreds of organizations, providing a full range of corporate and tax legal services that include representation for mergers, joint ventures, affiliations, and complex financings. Ms. Solomon currently serves as a United States delegate to the Financial Action Task Force, a member of the Charity Working Group of the U.S. Treasury Department and the Tax-Exempt Organizations Subcommittee of the American Bar Association, a member of the Charitable Organizations Committee of the Pennsylvania Bar Association, and a Faculty member of the Nonprofit Institute of the Pennsylvania Bar Institute. She is a Wexner Heritage Program Fellow and also lectures at the LaSalle University Nonprofit Center, the University of Pennsylvania, and Villanova, Drexel, and Temple Universities. Prior to starting her firm, Ms. Solomon was associated with Ballard Spahr Andrews & Ingersoll, LLP. She is a member of the Bar Associations of New Jersey and Pennsylvania and received her B.A., magna cum laude, from Tufts University and her J.D. from the University of Pennsylvania.

Sr. Shaun Vergauwen, FSE is a Franciscan Sister of the Eucharist at the Motherhouse in Meriden Connecticut. She has received a MA in Sociology from St. Louis University. She is also a Licensed Marriage and Family Counselor. In July, she completed two terms as Mother General.

Sr. Patricia Vetrano, RSM, serves as the president of the Sisters of Mercy Mid-Atlantic Community whose administrative offices are in Merion, PA. Prior to being elected to leadership, Sister Pat served in the New York area in elementary education, formation ministry, secondary counseling and as a high school principal. During her years in leadership, both as vice-president and president, she has worked closely with her community's director of communications regarding such things as alienation of health systems, sale of nursing facilities and other properties, closing of several education ministries and various Church issues. She holds bachelor degrees in education and psychology from Mercy College, Dobbs Ferry, NY, a MA in education from City College, New York, a MA degree in counseling from Manhattan College, NY. She is a certified secondary school administrator as well as a spiritual director. Sister Pat has served on a variety of boards for Catholic health systems, social service and educational ministries and foundation boards.

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 has assisted the NRRO as a consultant for the Planning and Implementation Process. Matt assisted in the development of TRENDS Version 2015. He holds degrees in Business Administration from John Carroll University and Religion & Religious Education from The Catholic University of America. He is currently serves on the RCRI Board.

Sr. Corinne Weiss, SJ currently serves as President of the Servants of Jesus, a 12- member Institute of diocesan rite under the jurisdiction of the Ordinary of the Archdiocese of Detroit, MI. This year marks Sr. Corinne's 25th year in leadership within the community as a member of different teams. The Servants of Jesus were established in 1974 after 25 members of the Felician Sisters Province of Livonia, MI officially separated from the parent Order. In November of 2012 the Servants of Jesus began discerning and working toward their inevitable completion as an institute. The institute is currently discussing the possibility of accepting a canonical commissary after July, 2018.

Darrin L. Williams, CEO, Southern Bancorp, Inc. Darrin Williams oversees the strategic direction and operations of each of Southern's three Community Development Financial Institutions: Southern Bancorp, Inc., Southern Bancorp Bank, and Southern Bancorp Community Partners – collectively known as "Southern." Prior to leading Southern, Williams served as managing partner at the law firm of Carney, Williams, Bates, Pulliam & Bowman, PLLC, where he represented institutional investors and consumers in class action litigation against some of the nation's largest publicly traded companies. Williams also served three terms of elected office in the Arkansas House of Representatives (2008-2013), serving as Speaker Pro Tempore of the 89th Arkansas General Assembly. As a lawmaker, he was named a Champion of Small Business by the National Capital Coalition, an Aspen-Rodel Fellow in Public Leadership by the Aspen Institute, and listed as one of 12 state legislators from around the country to watch by Governing Magazine. Williams received his BA from Hendrix College, his JD from Vanderbilt University School of Law, and his Master of Laws degree in Securities and Financial Regulation from Georgetown University Law Center in Washington, D.C.

Registration Information

Conference Site

The 2017 RCRI National Conference (lodging and events) will be held at the:

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

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 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 "Services, National Conferences, National Conference 2017." Registration is available through October 13, 2017 but save $50.00 by registering early!

	Before 9/15	**After 9/16***
RCRI members rooming at the Hyatt Regency St. Louis at the Arch*	$500	$550
RCRI members not staying at the Hyatt Regency St. Louis at the Arch*	$600	$650
Those who are not RCRI members	$850	$900

RCRI members include all members and employees of religious institutes with paid 2017 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 Hyatt Regency St. Louis at the Arch

Cancellation Policy

- For written cancellations before September 15th, 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 16th and October 6th .
- On or after October 7th, no refund will be made.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by 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 $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 9, 2017. Direct reservations to the hotel will not be awarded at the RCRI discount rate.

Reservations

All reservations must be made through the Nix Conference and Meeting Management online reservation system; a link is on the RCRI website, **http://www.trcri.org/page/NC17**. Credit card information is required when making your reservation. The first night's deposit is required at time of booking. If sharing a room, please register each individual by name on the registration form to be assured of the discounted RCRI conference registration fee. Special needs should clearly be identified on the hotel reservation form. When you click the 'Submit' button, your hotel reservation will be transmitted to Nix Conference and Meeting Management on a secure website which protects your identity and information. For other inquiries, contact Nix at registrar@nixassoc.com or phone toll free 800-266-0866, or 314-645-1455. All guests with confirmed reservations will be accommodated.

Hotel Amenities

The Hyatt Regency St. Louis at the Arch has Free Wi-Fi is available in guestrooms and social spaces like lobbies and restaurants, excluding meeting spaces.

The hotel has a full-service business center and provides several on-site dining options. The hotel also has an extensive fitness center.

Airport & Transportation

The Hyatt Regency St. Louis at the Arch is close to the Lambert St. Louis International Airport (STL) – it is 15 miles/20 minutes away.

Shuttle Service

Discounted Airport-to-Hotel Shuttle Transportation

Resource Center for Religious Institutes and GO BEST Express have partnered together to provide convenient shared ride shuttle service to/from the airport and local hotels. Between the reliable and friendly chauffeurs, the clean vans, and amazing rates, there's no other way to GO than with the BEST!

CLICK HERE **https://gobestexpress.com/reservations?code=RCRI2017** to receive 10% OFF standard rates. Discount rate ONLY available by booking through the provided link no later than October 27th, 2017.

Reservations made on the spot at the counter will be subject to standard rates of $45 roundtrip.

Mass/Prayer Services

Is provided, 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 CORTs who wish to gather during Wednesday's lunch break.

Audio Tapes and Workshop Handouts

Most workshops will be audio taped, our Keynote speaker will be videotaped. 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 **http://www.trcri.org/page/NC17** 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, 2017.

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