

THE RESOURCE CENTRE FOR RELIGIOUS INSTITUTES (RCRI)

2023 CONFERENCE REPORT

The Resource Center for Religious Institutes (RCRI) is an organisation created to serve the needs of Catholic communities of religious women and men. Their professional staff offer advice and provide resources for the leadership of religious institutes who become members of RCRI. For over 35 years, RCRI or its predecessor organisations have been a partner to help navigate the many complexities related to taxes and tax-exemption, corporate structure, internal organisational setup, finance, administration, and canon law. They work with hundreds of religious institutes and societies of apostolic life from all over the United States and from several foreign countries.

The Resource Center for Religious Institutes serves its member institutes by providing integrated education, advocacy, consultation and collaborative initiatives to support religious institutes in meeting their current and emerging stewardship responsibilities.

Each year, the RCRI hosts an annual conference. This year it was held in St. Louis, Missouri from 26-29 October. The conference was attended by ~550 conference attendees and ~200 conference exhibitors.

The 2023 program included 41 workshops covering topics related to finance, canon and civil law, and planning for institutes in transition, as well as 3 eldercare workshops sponsored by the National Religious Retirement Office.

The theme of this year's conference was Communications in a Synodal Church – Opportunities and Challenges. The keynote address was given by Kim Daniels. Key takeaways from Kim's address were:

- Be comfortable in the messiness. The path forward will take a long time.
- A clear and decisive focus upon Gospel and Mission is key. Unity is crucial.
- Despite the challenges we are always hopeful. Sacraments are being celebrated and the sick are being cared for.

Attending the conference also presents a wonderful opportunity to network with our International colleagues and to share our experiences from across the globe.

NETWORKING CONVERSATIONS: Brad Hannagan and Linda Ferrington

- **Lynn McKenzie, Benedictine Sister, Canon Lawyer, assisted with Carmelites Toronto.**
 - Emphasis on a pre-meeting in Rome with Fr Richard Welch

- **Sharon Euart and Sr Ann Lacour, MSC, was the first commissary appointed by Rome in 2014.**
 - Ann emphasised that her role was very relational due to the prior relationship between her congregation and the community where she was the Commissary.
 - Need time to engage her congregation in as many ways as possible with the new group, not only for her to have a relationship with the new congregation.

- **Mary Pellegrino and her team from Plante Moran.**
 - A significant amount of time was spent exploring the connection between Plante Moran and EFCL.
 - We provided information about the EFCL model and answered their questions.
 - Mary's visit to Sydney in 2024 will allow the Board/Members/Staff to hear her first-hand.

- **Pat Cormack and Director of Transitions and Operations for Wisconsin Collaborative of Women's Religious Congregations**
 - They are challenged regarding their financial sustainability.
 - In light of their engagement with EFCL, they seek to employ a Shared Services Manager to develop this model across finances and health and well-being needs.

- **Amy Hereford, Canon Lawyer**
 - Amy advised of tentative plans to visit Australia in 2024.

- **Sr. Paula Cooney, IHM: A diocesan commissary appointed by the diocesan bishop in 2017.**
 - Start early with the Congregation in planning for a Commissary.
 - Ensure that all is ready before the petition to the Ecclesial authority.
 - Expectations did not meet the reality of the experience, and the Commissary had to make changes in the initial six months, which was not ideal.
 - Transfer readiness must be examined closely and in detail.

- **Carol Zinn from LCWR and Mark Schafale, (the Chief Financial and Administrative Officer for the Felician Sisters of North America) Administrative/Management Support Network**
 - Mark's role is to develop shared services around Financial Management for Congregations.
 - Early days and beginning with three groups and others have approached them.
 - Challenge to not have their person on site and to provide remote services centrally located in one or two LCWR regions.

- **Carol Zinn asked for another meeting with Linda.**
 - Delighted with CRA/EFCL meeting in Rome.

- Need to visit annually to ensure current information is provided to the Dicastery.
- Set up a meeting with UISG to coincide with the visit. It is essential to be in conversation with Pat Murray and other key staff members.
- Emphasis on the formation undertaken in preparing Commissaries, our Canonical Delegates.
- Formation of the Board, skill mix and their understanding of Religious Life and Canonical responsibilities.

WORKSHOPS: Linda Ferrington

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

When actuarial studies and declining numbers signal that a religious institute will complete its mission in a defined period, that does not mean the institute's ministry must end. This workshop identified and discussed legal alternatives.

The Religious Institute needs to discern:

- If you don't make the decisions yourself, then someone else will make it like:
 - Ecclesial authorities
 - Leadership of congregation-if an international institute
 - State and local civil authorities
 - Individual or group plaintiffs
- Temporal assets that remain at completion are the product of generations of work.
- Identify ministries that may be continued post-completion.
- Placement of real property into platforms that will permit continued use in a manner consistent with the institute's charism.
- Configuration of long-term funding programs to support defined ministerial activities.
- Selection and engagement of excellent and trusted financial advisors and investment companies.
- Ensure secure legal and canonical interests for the religious institute's long-term intent.
- Awareness of compliance with state law relating to charitable assets.
- Opportunities for creativity in the process.

The Service Partners and EFCL address these issues in developing their detailed Governance Plan.

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

This workshop emphasised the need to promote better opportunities and advantages of legacy giving to their constituents.

This is addressed by the discernment and consultation process undertaken by each EFCL Service Partner in creating their Distribution Planning and the appropriate financial

structures to ensure their economic viability for the members of the Institute and their mission priorities.

Our Employees, Our Mission, Our Legacy – Dayna Larson-Hurst, Sr. Michael Ann Orlik SS.C.M & Sr. Barbara Sable SS.C.M

This workshop was focused on work undertaken in Australia through the MPJP. When Religious Institutes have transferred Canonical Governance/Sponsorship and how Formation is incorporated into all levels of the specific ministers to preserve the Catholic identity of ministries of religious institutes. There was practical sharing of an ongoing process of creating a formation path for staff to encourage them to embrace their work as a ministry rather than just a job.

Religious Institutes and Senior Care: How Do We Care For Our Members? – Lori Ashmore-Rupel, Fr. Charles Bouchard OP & Susan McDonough

The presentation by Charles Bouchard OP challenged participants to explore what role the Church and our communities should play in addressing the growing social need for quality senior care due to inadequate funding, a shift away from skilled nursing and personnel shortages. Practical examples were provided where Religious Institutes had engaged in successful partnerships.

I met with Charles Bouchard after this workshop as he was an influential writer and presenter for CHAUSA, and his writings were very effective in the formation processes I set up with our PJP. He spoke of the AMPJP as an outstanding example of the development of MPJP and a global leader in this space.

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

This workshop emphasised the Religious institutes' obligations to provide safe environments for vulnerable adults as this continues to grow and become more complex. The safeguarding ministry faces new challenges in today's ever-evolving social and legal landscape. This presentation discussed those emerging challenges and available tools and best practices for religious institutes to fulfil their obligations to provide safe environments for vulnerable adults. Topics discussed included the increased focus on the protection of vulnerable adults in recent years, the development of clear codes of conduct, and the role of the leader in implementing effective safeguarding protocols.

A detailed signed Code of Conduct must be simultaneous with signed contracts. Need to ensure that the policy regarding Safeguarding is monitored.

EFCL's engagement with the Safeguarding Officer and the training has addressed these issues. Before transfer by the Religious Institute, the transition readiness needs to be monitored through our Audit processes and ensure all actions are completed.

Pope Francis writes To The Members Of The Pontifical Commission For The Protection Of Minors Friday, 5 May 2023

“The principles of respect for the dignity of all, for right conduct and a sound way of life must become a universal rule, independent of people’s culture or economic and social condition. All the Church’s ministers must respect this rule in the way they serve the faithful, and they, in turn, must be treated with respect and dignity by those who lead the community. Indeed, a culture of safeguarding will only take root if there is a pastoral conversion in this regard among the Church’s leaders”.

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

This workshop was centred on the importance of ritual and prayer and how they bond us together and nurture our individual and community’s health and well-being, decreasing our stress and boosting our joy.

This has been evident in how prayer and reflection have commenced every EFCL encounter with Service Partners. I called to mind the discernment ritual for one community encompassing all the elements mentioned in this workshop.

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

This workshop specifically addressed the context of selling or redeveloping ecclesiastical real property. The context was Sponsorship, which we are familiar with as defined by Frank G. Morrissey OMI. “Sponsorship of an apostolate or ministry is a formal relationship between a recognised Catholic organisation and a legally formed entity entered into for the sake of promoting and sustaining the Church’s mission in the world”.

- Need for Religious Institutes to access a Canon Lawyer to assist in the understanding of the relationship with Civil authority governed by state law/s.
- Retain the nexus of focus ministry of the intersection of its purpose with maintaining Catholic identity and service. This was focused on PJPs.
- Strong relationship and communication with those entrusted with stewardship to ensure an effective working relationship with the Church.

Fidelity to the Journey: A Conversation with Commissaries – Sr. Sharon Euart, RSM, Sr. Paula Cooney, IHM, Sr. Jane Hibbard, RNJM, Sr. Jenny Howard, SP, Sr. Helen Kearney, CSJ, Sr. Ann Lacour, MSC, Sr. Ramona Miller, OSF & Sr. Jo Ann Showalter, SP

As religious institutes consider options for canonical governance, questions arise regarding what a Commissary is; six pontifical or diocesan Commissaries shared their experience during the workshop.

Relationships

Each Commissary spoke of a significant weekly time commitment of 2-5 days.

- A Diocesan Commissary: The community desired a relational appointment and invited 3 Congregations to discern with them for 6-12 months. RI asked LTs to meet and discern if they could engage in this relationship.

- Poor Clare Commissary moved into accommodation on-site with Franciscans and returned to her community at the weekend.
- Helen Kearney emphasised her Canonical and Civil Responsibility
- One Commissary is for a community living within her large convent.
- Another sees her Commissary role as walking with them in a covenant relationship.
- One Commissary has three advisors and lives nearby, and is present to them 2-3 days per week. For as long as they can, to celebrate and live as they wish. Final decisions rest with me as CD.

Major Canonical Responsibilities:

- Transfer of responsibilities between groups needs to be discerned and owned by the whole group.
- For as long as they can to celebrate and live as they wish. Final decisions rest with me as CD
- Corporate responsibility to overseas the Trust, connected with a third congregation.
- I have 2 Consultors from the community and focus on making pastoral decisions for the community.
- Growing into the Ministry, gradual trusting on each side.
- It is never too early to let go; it needs patience and prodding.
- This is where we are and where we want to be.
- The smaller we are, the harder it is to let go.
- Everything was in place when I arrived as the Commissary, and it was clear how things are done, fiercely independent. Being alert and attentive to the culture was primary to me.
- Former leaders are health proxies for one community.
- The significant shift for all Community involvement to this new governance structure.
- How to deal with the corporate board was a learning experience.

Preparation to prepare to be a Commissary:

- Need to know the culture of the group.
- Understand the journey of the discernment process.
- Naming the loss of autonomy.
- Have a common background with the community.
- Understand the long discernment process, meetings, and gatherings to discuss grief openly. There is life as well.
- Closing a community is more demanding than coming to a new country!!
- Letting go of the prior leader was extremely hard.
- Closure does not equal failure; it is the lifespan of religious life.
- Not coming to completion, language focuses on the mission, which continues and is still alive.

Latest development

- Communities request that another Religious Institute be named the Commissary, and then the Congregation appoints a sister to be the Commissary for a specific time.
 - This means that when a person completes the role, the community does not have to request a new appointment.
- Creative energy for the younger sisters to be considered: what will that look like?

WORKSHOPS: Brad Hannagan

Incorporating a Culture of Philanthropy in your Religious Community – Zela Astarjian, Katie Thiemann, Sr. Irene O’Neill CSJ, and Sr. Barbara Thomas ASCJ.

- Fundraising is difficult and most people dislike fundraising – “I’ll do anything you wish, except ask for money”.
- Fundraising is a skilled task and requires expertise and follow-up.
- Talking about money is the last remaining taboo in society.
- Fundraising is not about money – it’s about investing in our Ministry.
- People have tremendous trust and gratitude for the Sisters and Brothers and their ministries.
- Strategies were provided for hosting medium to large fundraising events.
- The book *A Spirituality of Fundraising* by Henri J M Nouwen was suggested as recommended reading.

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

- When a member is dealing with a mental health condition, the impact is on the community as well as the individual. How do we create a healthy community when interpersonal dynamics are challenging?
- Sr. Julie’s presentation focussed upon increasing the awareness of mental health conditions in the general population.
- Although US data was cited, there is a correlation with the Australian population.
- 23% of US adults are living with mental illness.
- More and more, evidence of unresolved trauma is being discovered in people’s backgrounds.
- 2/3 of the US population are impacted by childhood experiences.
- There needs to be an increased awareness and understanding of mental illness in the community.
- The focus needs to be upon addressing how the community supports the member with mental illness.
- Increased training or the addition of human expertise in this field is required.
- Change only occurs in an accepting and empowering atmosphere.

What Your Donors Won't Tell You About Your Fundraising... But We Will! – Chad McEachern and Leslie Mollsend

- Chad and Leslie delivered a very engaging session.
- After the first gift, only 35% of donors make a second gift (US Data).
- 2/3 of donors say “never again”.
- 73% are individual donors rather than families or companies.
- Donors must be viewed as a partner in your Mission.
- Explain the impact of the gift and listen to the donor.
- Craft the message after you have engaged the donor.
- Let the donor choose:
 - How to communicate
 - How they give
 - Who they see
- Philanthropy must be built on trust – we heard this multiple times throughout the conference.
- Address and challenges head-on and allow donors to be a part of the solution.
- Share with the donor the positive impact they are having.

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

- This was another engaging and informative session. Mary spoke of the need for formalised structures in the compensation cycle.
- Beware of Compensation Traps:
 - Communicate, communicate, communicate. The system does not belong to HR alone. Managers and Employees must be taught how the system works.
 - Not thoroughly thinking through “pay for Performance”. Is it even possible in your environment?
 - Not understanding the “Competition”.
 - Not using the correct salary data when benchmarking.
 - Living by exception thus creating and enabling internal inequity
 - Adjusting pay structures without looking at pay levels for each role.
- Equitable compensation plans:
 - Communicate the organisation’s values.
 - Determine what the organisation can afford to pay.
 - Evaluates what others are paid.
 - Provides just treatment of all employees.
- Equity is addressed as:
 - Internal Equity – how positions are ranked based on skills and responsibilities.
 - External Equity – how the pay structure compares with those of similar organisations.
 - Individual Equity – how employee rates compare with those of other employees doing the same job or level of work.
- The process for Equitable Compensation Plans:
 - Step 1 - Develop a Pay Philosophy.
 - Step 2 – Update all Position Descriptions.

- Step 3 – Benchmark all Positions.
- Step 4 - Create Pay Ranges.
- Step 5 – Put Positions in Ranges.
- Step 6 – Evaluate and Update

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

- Toni spoke from a position of lived experience currently holding the role of Director of Province Administration at the Congregation of Our Lady of Charity of the Good Shepherd.
- Toni impressed the need to clearly understand that this is a role where authority is delegated to the COO/ED and ultimate authority remains with Congregational Leadership.
- Increased number of Religious Institutes moving in this direction.
- This is a viable option for congregations to accomplish mission and vision.
- What does a COO do? Commonalities in Position Summaries:
 - Responsible for the day-to-day operations.
 - Has held previous Leadership Positions.
 - Business Acumen and Strategic Thinking.
 - Oversight and supervision of significant departments.
 - Guiding, developing and supporting staff.
 - Reports to RI Leader or Leadership Team.
 - Carries the Mission, Values and Charism.
- What does the COO do in Practice?
 - Visits the sisters in their community home taking in their wisdom and expertise all while evaluating property needs and safety and security.
 - Strategy – working with the Leadership Team about long-term archives and housing needs.
 - Collaborating with Staff on improving processes.
 - Property and Project Management.
 - Financial Management.
 - HR and Employment Compliance.
 - Staff Professional Development.
 - Ready to roll up their sleeves when needed.
- If the COO is doing these functions, what does the Leadership Team do? Better question: What does this free you up to do?
 - Strategizing, discerning, contemplating on Mission and Values; Legacy; Eldercare; Vocations; Continuing Formation for Sisters and Lay Partners; Organisational Culture.
 - Being able to be fully present for sisters in their growing needs and concerns
 - Travel to communities, sponsored ministries and conferences and meetings.
- What is the Relationship between the COO and Leadership Team?
 - What you would like it to be.
 - Thought partner.
 - Confidante.
 - Trusted Advisor.
 - Respected Leader with expertise.

Employers on the Upswing – Jennifer Gniady

- From the Great Resignation to the Great Rebalancing, this session focussed upon issues marking today's economic environment.
- This workshop focussed upon the legal landscape and maintaining a pastoral approach to employment issues.
- Salary is still the lynchpin but is not alone. You must consider the "industry" of competition when comparing salaries.
- Other "benefits" such as the environment – In-person/Hybrid/Virtual (WFH)
- Leave of All Types
- Don't exclude Mission and Ministry from Employment Contracts and Position Descriptions.
- Link Position Description to behaviours and expectations and connect the dots between the employee's position and ministry.

Conclusion

The conference experience, particularly the networking meetings, was an affirmation of the vision, research, theological underpinnings and planning that went into creating the EFCL framework to assist Religious Communities in walking each other home. The critical difference between the US and EFCL model is evident in the "hands-off" role of the Commissary/Canonical Delegate, ensuring that the Canonical and Civil responsibilities are exercised in the light of the Religious Institute's specific wishes and the inclusion of the Community Coordinator's role.

Many of the networking meetings and workshop sessions identified the need for US Congregations to begin to explore the Shared Services Model that is being implemented by EFCL.

Overall, the conference was an incredibly valuable experience and one we were very grateful we could attend. Along with the strengthening of our International Networks, the knowledge gained from the workshop sessions will continue to inform our mission going forward.

Linda Ferrington rsc
Mission Integration Manager

Brad Hannagan
CEO

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