THE RESOURCE CENTER FOR RELIGIOUS INSTITUTES

NATIONAL CONFERENCE

ST. LOUIS, MISSOURI • NOVEMBER 8-11

THE RESOURCE CENTER
FOR RELIGIOUS INSTITUTES

CONFERENCE SCHEDULE

TUESDAY, NOVEMBER 8

7:45 – 8:55 a.m.	Check-in Open for Pre-Conference Seminars
8:15 a.m. – 4:00 p.m.	**PRE-CONFERENCE SEMINAR A:** Retirement Issues
9:00 a.m. – 3:00 p.m.	**PRE-CONFERENCE SEMINAR B:** Trends Training for Beginners
11:00 a.m. – 3:00 p.m.	Exhibitor Set-up
3:00 p.m.	Attendee Check-in / Exhibits Open
5:00 p.m.	Conference Opening and Prayer
5:30 – 7:00 p.m.	**KEYNOTE:** *The Church in Iraq*
7:00 – 8:30 p.m.	Reception

WEDNESDAY, NOVEMBER 9

7:15 a.m.	Eucharist
7:00 – 8:30 a.m.	Continental Breakfast
9:00 – 10:30 a.m.	**SESSION 1**
10:30 – 11:00 a.m.	Break
11:00 a.m. – 12:30 p.m.	**SESSION 2**
12:30 – 2:00 p.m.	Buffet Lunch / Optional CORT Meetings
2:00 – 3:30 p.m.	**SESSION 3**
3:30 – 4:00 p.m.	Break
4:00 – 5:30 p.m.	**KEYNOTE:** *Catholic Identity*

FREE EVENING

THURSDAY, NOVEMBER 10

7:00 – 8:30 a.m.	Continental Breakfast
8:30 – 8:50 a.m.	Prayer
9:00 – 10:30 a.m.	**SESSION 4**
10:30 – 11:00 a.m.	Break
11:00 a.m. – 12:30 p.m.	**SESSION 5**
11:00 a.m. – 4:00 p.m.	Exhibitor Breakdown
12:30 – 2:00 p.m.	Lunch on your own
2:00 – 3:30 p.m.	**SESSION 6**
3:30 – 4:00 p.m.	Break
4:00 p.m.	Eucharist

FREE EVENING

FRIDAY, NOVEMBER 11

7:00 – 8:30 a.m.	Sit Down Breakfast
9:00 – 10:30 a.m.	**SESSION 7**
10:30 – 11:00 a.m.	Break
11:00 a.m. – 12:30 p.m.	**SESSION 8**

WORKSHOP DESCRIPTIONS

TUESDAY, NOVEMBER 8

PRE-CONFERENCE WORKSHOPS

$275 FOR FIRST PERSON FROM YOUR COMMUNITY

$225 ADDITIONAL (LUNCH INCLUDED)

7:45 – 8:55 a.m.	Check-in Open
8:15 a.m. – 4:00 p.m.	BASIC ELEMENTS OF A COMPREHENSIVE RETIREMENT PLAN *Sr. Janice Bader, Beverly Erickson, Catherine Keevey, Sr. Hertha Longo, Ray Mattes, Bro. Robert Metzger, Bro. Hank Sammon & Fr. Dan Ward*

COMPREHENSIVE RETIREMENT PLANNING

This pre-conference workshop will explore the elements of a comprehensive retirement plan. Planning for quality of life in the elder years is about much more than addressing financial concerns. This workshop will be introduced by the staff of the National Religious Retirement Office (NRRO), and they will be available to answer questions about their services and to offer resources for your retirement planning. The speakers will explore the major components of retirement planning:

- Developing a philosophy of aging and eldercare
- Eldercare delivery
- Physical, spiritual and psycho-social dimensions of aging
- Financial management
- Facilities and property issues

JANICE BADER, CPPS, a member of the Sisters of the Most Precious Blood of O'Fallon, MO, currently serves as Executive Director of the National Religious Retirement Office. She has worked with numerous religious institutes throughout the United States to assist with retirement planning. Janice holds a Masters degree in business administration from Southern Illinois University at Edwardsville.

BEVERLY ERICKSON has enjoyed a successful career in both healthcare and real estate and currently serves as Vice President, Asset Management, at Trinity Health. Bev provides service and leadership to the ministry organizations at Trinity in the development of a full spectrum of Asset Management strategies including Real Estate, Capital Projects, and Bio-Medical Equipment service. While at Plante & Moran CRESA, LLC, Bev specialized in development consulting and also served as a trusted advisor on real estate matters to several religious communities. Bev holds a Bachelor of Science in management from Oakland University and a MBA from Wayne State University.

CATHERINE M. KEEVEY, RN, BSN, MA, has over forty years experience in nursing in both direct care and administration. This included the management of home health and hospice organizations in the Northeast and work at the Third Age Center at Fordham University with responsibility for developing the programs for care of elder religious. She has been among the early health professionals to develop the role of health coordinator for religious communities and was employed in that position for a community of women religious for nine years. Catherine serves as a consultant for NRRO and works with men and women religious in both small and large institutes.

HERTHA LONGO, CSA, PHD, has served as General Treasurer of the Sisters of St. Agnes for almost 18 years. She is also the Chair of the Board of RCRI after having served as the Board Chair of NATRI. Hertha holds a nursing degree, an MBA from Fordham University and a Ph.D. from Notre Dame University. She has also a very active consultant for NATRI and NRRO and continues her work with religious institutes with RCRI as well. Hertha is currently working with two religious institutes (1,000 plus combined membership) on a joint Alzheimer's unit project as she is also involved in enrolling institute elders in a family care Medicaid waiver program.

RAY MATTES, IHM, is a member of the Immaculate Heart Community and currently serves as Administrator of Home Care for the Los Angeles Province of the Sisters of St. Joseph of Carondelet. A credentialed professional Gerontologist, he earned Master Degrees in gerontology and public administration from the University of Southern California and a Master Degree in pastoral

WORKSHOP DESCRIPTIONS (continued)

theology from Loyola Marymount University. In addition, he is a licensed nursing home administrator, a certified case manager, a certified Grief Recovery Specialist® and a spiritual director. Ray facilitates workshops and retreats throughout the United States to clergy, religious and laity on the topics of elderhood, life-long spiritual formation and eldercare.

BROTHER BOB METZGER, SM, is Associate Director for Planning and Education at the National Religious Retirement Office and is a Certified Public Accountant (retired). Brother Bob is a member of the Society of Mary (Marianists) and has served his community as Assistant Treasurer, Treasurer, a member of the Provincial Council, chair of the treasurers committee that oversaw the financial, accounting and legal portions of the four Marianist provinces merger, and as the Director of Finance in the new province.

BROTHER HANK SAMMON, FMS, JCL, is a member of the Marist Brothers of the Schools and has been one of the Associate Directors at the National Religious Retirement Office for the last eight years. He has served his Province as an elementary and high school teacher and administrator in schools in Oregon, Illinois and New York, as well as Provincial Treasurer. He holds a Masters Degree from the University of Notre Dame in school administration and finance and a Licenciate in canon law from The Catholic University of America.

DAN WARD – **SEE WORKSHOP # 4.**

9:00 a.m. – 3:00 p.m. TRENDS TRAINING FOR BEGINNERS
Sr. Laura Reicks, RSM

$150 FEE (LUNCH INCLUDED)

▶ **TRENDS TRAINING FOR BEGINNERS** will be demonstrated on Windows 2010, using Excel 2007. This workshop will help you to understand the "how to" mechanisms of TRENDS, with pointers for using it in Excel 2007. Directions for use with earlier operating systems will be provided. You will learn how to install TRENDS, how to collect data prior to using TRENDS, how to maneuver between the tabs and how the spreadsheets interact, about the two types of projections generated, and about assumptions and testing data input. This workshop includes hands-on installation and use of TRENDS with sample data.

SISTER LAURA REICKS, RSM, is the Treasurer for the Sisters of Charity of the Blessed Virgin Mary in Dubuque, IA. In this position she contributes to congregational planning through the use of TRENDS and other tools. She continues to do consulting work on TRENDS, which she helped to develop through its various stages. Laura has served as Executive Director of NATRI, Associate Director of the National Religious Retirement Office, and Business Manager for her religious community. She brings to her ministry a working knowledge of a variety of religious institutes, both from the financial and leadership perspectives.

11:00 a.m. – 3:00 p.m.	Exhibitor Set-up
3:00 p.m.	Exhibits Open
	Attendee Check-in
5:00 p.m.	Opening and Prayer
5:30 – 7:00 p.m.	**KEYNOTE:** The Church in Iraq *Fr. Manuel Boji*

THE CHURCH IN IRAQ

Today Christians in Iraq face persecution and prejudice. There have been bombings of Church and murder of Christians. Many Christians are leaving the country because of the situation. Father Boji will address the present situation of Christians and the future of the Chaldean Catholic Church in Iraq In order to give a fuller understanding of the present situation, Father Boji will also history the history of the Chaldean Catholic Church in Iraq especially the Church as an ancient Christian Church, its missionary activities, the persecution it has suffered and the migration of its members throughout the world.

This presentation is part of a keynote theme at the national conference to help those attending the to come to know the Church as it exists in different countries and cultures. Last year the keynote addressed the Spanish-speaking Church in the United States. In future conferences RCRI will continue with the keynote theme.

Fr. Manuel Boji was born in suburbs of the ancient city of Nineveh- Iraq on August 1st 1946. He was ordained priest on June 2nd 1968. His first priestly assignment was in his home town where he served for nineteen years. On July of 1987 he was moved to the St. Thomas the Apostle Chaldean Catholic Diocese of the United States of America. In these years he served in some of the Chaldean parishes, among them was the Cathedral Parish, Our Lady of Chaldeans Cathedral- Mother of God Parish from May 1990- July 2010. On July of 2002 Fr. Manuel Boji was appointed as the Vicar General to the St. Thomas the Apostle Chaldean Catholic Diocese of the United States of America, and he still holds this position. On July 2010, Fr. Manuel Boji was appointed as pastor to a newly dedicated Chaldean church in the Metropolitan Detroit area, The Holy Martyrs Chaldean Catholic Church

7:00 – 8:30 p.m. Reception

WEDNESDAY, NOVEMBER 9

7:15 a.m. Eucharist

7:00 – 8:30 a.m. Breakfast

SESSION 1

9:00 – 10:30 a.m.

1 LEGAL ISSUES UPDATE

Donna Miller

This workshop addresses some of the most frequently asked questions from the last year as well as some of the changes in laws that affect religious institutes, their members, and employees.

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.

WORKSHOP DESCRIPTIONS (continued)

2 THE BASICS OF INVESTMENT

Eileen O'Connell

This workshop offers practical education about the basic tools of investing to help new treasurers become more comfortable with their responsibilities. Experienced treasurers may also find it useful as a refresher course. Topics include:

- Introduction to stocks, bonds and financial markets
- Understanding different asset classes and benchmarks
- The principles behind basic asset allocation
- Socially responsible investing and investment policy statements
- Evaluating performance
- Risk and risk tolerance.

EILEEN A. O'CONNELL joined CBIS in 2004 as an Investment Advisor. She is responsible for developing and retaining participant relationships in the Eastern region, as well as servicing CBIS' European participants. Prior to joining CBIS, her most recent position was Regional Director at Neuberger Berman. Her extensive experience in the financial services industry includes servicing high net worth clients, equity analysis and sales and marketing to financial consultants. Ms. O'Connell holds a B.S. in Finance from St. John's University and Series 7 and 63 FINRA registrations.

3 WHO DECIDES – LEADERSHIP, MEMBER OR MEMBER'S FAMILY OR FRIENDS?

Lynn Jarrell, OSU and Daniel Ward, OSB

Leadership may need to intervene in a member's life—perhaps because of substance abuse or other personal issues, sometimes involving family or friends of the member in the intervention. However, it may happen that family or friends of the member may not give deference to the decisions of leadership. Perhaps they do not agree with the elder care given a member and wish to move the member to a different health care facility. Contrary to the practices of an institute, the family or friends may decide to arrange for the funeral and burial of a member at a place other than the church and cemetery of the religious institute. In other instances, without consulting leadership, a member of the institute may make commitments to family or friends, such as providing long term home care for a parent or friend, or assuming custody of children. Such decisions can affect participation in community life and the financial resources of the institute. This workshop examines the complexity of these and similar issues involving members of a religious institute.

LYNN JARRELL, OSU, is currently the President of the Ursuline Sisters of Louisville, KY. She has a doctorate in Canon Law and a Masters in Communications. Between 2005-2008 Lynn was Associate Director of Canonical Affairs for the Resource Center for Religious Institutes. Since 1984 Lynn has worked with the leadership of religious institutes in the United States and beyond in the role of consultant, presenter, and teacher on a variety of topics. In addition, she has taught canon law at various schools of theology, seminaries and other programs.

DANIEL WARD, OSB, JD, JCL, is a Benedictine monk of St. John's Abbey, Collegeville, MN. Dan has advanced degrees in Systemic Theology, Canon and Civil Law and was professor of Canon and Civil Law at St. John's University. Presently he is the Executive Director of the Resource Center for Religious Institutes. He is an author, lecturer and legal consultant and is on the Council of the President for the American Cassinese Congregation.

4 BANKRUPTCY: BY AN INSTITUTE AND BY AN INSTITUTE MEMBER

Cullen Kuhn

This presentation provides an overview of bankruptcy and the various types of bankruptcy proceedings under the Bankruptcy Code, including a discussion of issues specific to bankruptcy filings of not-for-profit organizations. It reviews the effect of bankruptcy filings on both the assets of the bankrupt entity and the claims of creditors, as well as the basic mechanics of bankruptcy cases. It also addresses the impact that bankruptcy filings of individual members may have for those individuals and their institutes and the considerations that may bear on such filings. There will be an opportunity for participants to raise questions and particular concerns regarding bankruptcy and the enforcement of creditors' rights.

CULLEN KUHN'S practice focuses primarily on restructuring and creditors' rights issues at Bryan Cave, LLC. He represents both debtors and secured and unsecured creditors in various bankruptcy proceedings, workouts, liquidations, and other restructuring matters, as well as litigation and appeals related to bankruptcy and insolvency. He also represents clients in collection matters and in litigation related to the Fair Credit Reporting Act. Mr. Kuhn regularly appears in bankruptcy, trial, and appellate courts around the country on behalf of his clients. Mr. Kuhn is experienced in transactional banking and lending work, particularly related to debtor-in-possession financing and similar transactions. He graduated from Vanderbilt University Law School.

10:30 – 11:00 a.m. Break

SESSION 2

11:00 a.m. – 12:30 p.m.

5 HOARDING: A PROBLEM OF ONE AFFECTING THE MANY (PART I)

Dr. Caroline Wroblewski

This two session workshop addresses the increasing problem of hoarding experienced by a significant number of religious: those who hoard, and those who live with them. Part I describes problems existing for the individual who hoards, psychological factors contributing to this behavior (e.g., family history, mood disorders, dementia, compulsions), and how the problem of hoarding interferes with the individual's personal, social, and professional functioning. It also considers how the problem affects those who share the same space.

CAROLINE L. WROBLEWSKI, PHD, LCPC, is a Licensed Clinical Professional Counselor in the state of Maryland. She received her doctorate in pastoral counseling from Loyola College in Maryland, and has been at Saint Luke Institute in Silver Spring, Maryland since 1991. Caroline is a psychotherapist and, since 1997, has been the clinical coordinator of the residential program for women religious. Caroline has given workshops on various topics for religious congregations of women throughout the United States and Canada.

Each part will cover separate issues. Please feel free to attend either or both.

6 MANAGING INVESTMENTS: PORTFOLIOS UNDER $5 MILLION

Tim Schwarzenberger

This workshop offers an overview of best practices and practical guidance for treasurers of organizations with under $5 million in assets. Topics include:

- Establishing an Investment Policy Statement (IPS)
- Best practices in asset allocation and rebalancing
- Indexing vs. active management
- Forming and working with an investment committee.

TIM SCHWARZENBERGER, CFA, joined CBIS in 2005 as an Associate Investment Advisor and was promoted to Investment Advisor in 2009. He is responsible for servicing participant relationships in the Central region as well as Spanish-speaking relationships in Latin America. Prior to joining the firm, he was an investment analyst for Towers Watson Investment Services in Chicago. Mr. Schwarzenberger graduated from Idaho State University with a B.A. in finance and a minor in Spanish. He is a CFA charterholder, and his FINRA registrations include Series 7 and 63.

7 THE INTEGRATION OF FACILITY ASSESSMENT FINDINGS WITH CORE VALUES IN PLANNING

Sr. Regina Marie Dubickas, SSC, Mark Higgins, Sr. Immacula Wendt, SSC, Roger Wozny

"How much will it cost to keep what we have and how should our facilities be utilized in the future?" The presenters will provide an overview of the components of a conditional and functional facility assessment and how to integrate it with core values into a proven planning process tailored to the religious institute's considerations. Insights will be provided from the institute leadership and facilities professional viewpoints regarding benchmarking, determining priorities, decision-making and planning.

WORKSHOP DESCRIPTIONS (continued)

SISTER REGINA MARIE DUBICKAS, SSC, has served on the leadership team of the Sisters of St. Casimir in Chicago for the past 12 years. As co-chair of the Vision and Life Committee, she has been actively involved in leading a process of creating a strategic plan that addresses the health care needs of the Sisters, property issues, and the values that remain at the heart of religious life. Sr. Regina has also served as vocation and formation director and is a licensed clinical psychologist.

MARK HIGGINS, AIA, LEED® AP, Executive Vice President of The Schemmer Associates has completed facility assessments (conditional and functional) and facilitated planning with Leadership Teams and/or Space Committees of over twenty religious institutes. He specializes in providing objective analyses, incorporation of core values into the planning process and facilitating concept alternatives to aid communities and congregations in decision-making.

SISTER IMMACULA WENDT, SSC, is serving her third term as General Superior of the Sisters of St. Casimir in Chicago. Previously, she was the General Treasurer and business manager for the Motherhouse facility and property. She has also co-chaired a committee to renovate the original Motherhouse building into more appropriate living spaces and to correct serious structural deficiencies. Sr. Immacula co-chairs the Vision and Life Committee to develop a strategic plan that addresses the facilities and the changing needs of the Congregation.

ROGER WOZNY, P.E., LEED® AP, Principal of The Schemmer Associates has devoted much of his career to assisting religious based organizations and communities in the development of strategic, organizational and master planning, including the Benedictine Sisters of Sacred Heart Monastery, School Sisters of St. Francis, Congregation of Divine Providence, Notre Dame Sisters, Benedictine Sisters of St. Walburg, the Missionary Catechists of Divine Providence and many others. Roger is a graduate of Creighton University with a degree in psychology and also isa licensed professional engineer. His special expertise in group facilitation earned him leadership roles in many non-profit organizations.

8 EVALUATING THE MERITS OF ACTIVE MANAGEMENT

David Immonen and Mark MacPherson

Indexing has gained widespread popularity in recent decades. In general, the rationale behind investing in index funds is that the performance of actively managed portfolios will, on average, fall short of the performance of passively managed portfolios after expenses and transaction costs. This presentation discusses inherent structural risk often overlooked in the indexing debate and compares the performance of truly active managers to broad market indices over different market environments.

DAVID IMMONEN is a Vice President/Client Consultant at Manning & Napier Advisors, Inc., where he has more than 17 years of investment experience. Dave is responsible for coordinating all aspects of client relationships with Manning & Napier. He earned his BA in Economics from the University of Notre Dame and an MBA with a concentration in Finance and Investments from George Washington University. He also holds Series 6, 7, and 63 licenses, and is a CFA charterholder.

MARK A. MACPHERSON, CFA®, AIF®, is the Director of the Manager Analytics Group at Manning & Napier Advisors, Inc. Primarily, he assists asset class analysts in the selection and monitoring of external managers and provides analytical support for the firm's institutional clients in areas including objectives setting, cash flow analysis, and portfolio analysis. Mr. Macpherson received his Bachelor of Science in Business Economics from Pennsylvania State University, holds the Chartered Financial Analyst and Accredited Investment Fiduciary designations, and is one of the employee-owners of Manning & Napier.

9 DIOCESAN REGULATIONS AND THEIR APPLICABILITY TO A RELIGIOUS INSTITUTE

Amy Strickland

This workshop explores the delicate balance between the authority of the diocesan bishop and the autonomy of the religious institutes, especially as it relates to the applicability of diocesan policies and procedures. Topics include liturgical celebrations, religious instruction and Catholic education.

AMY STRICKLAND, MA (THEOLOGY), JCL, is the Associate Director for Canon Law at RCRI. She did her graduate studies in theology at the Pontifical Faculty of the Immaculate Conception in Washington, D.C., and she studied canon law at Saint Paul University in Ottawa, Ontario. She worked in the Archdiocese of Boston, focusing largely on issues related to clergy misconduct, taught canon law, and is an adjunct faculty member at Saint John's Seminary in Brighton, Massachusetts.

12:30 – 2:00 p.m. Lunch Buffet/Optional CORT Meetings

SESSION 3

2:00 – 3:30 p.m.

10 HOARDING: A PROBLEM OF ONE AFFECTING THE MANY (PART II)

Dr. Caroline Wroblewski

For **PART I** description, **SEE WORKSHOP # 6.**

PART II considers the hazards of hoarding for the individual and for those in the community or professional environment. Health and safety hazards will be identified and recommendations to manage the problem will be suggested.

CAROLINE WROBLEWSKI – SEE WORKSHOP # 6.

Each part will cover separate issues. Please feel free to attend either or both.

11 ECONOMICS THE EASY WAY: A BASIC INTRODUCTION FOR TREASURERS

Walter Coughlin

In today's turbulent financial environment, a working knowledge of basic economics is essential for treasurers to effectively plan budgets, choose investments, and evaluate capital campaigns. Fortunately, introductory economics is easier than people imagine. This entertaining workshop will provide a thumbnail overview of key economic principles and easy suggestions for how to monitor and evaluate economic developments in only several minutes per week. Handouts will provide an "economic playbook" in plain English for handy reference long after the conference ends.

WALTER J. COUGHLIN is Executive Vice President of Coughlin & Company, a third generation, family-owned firm that creates and implements tax-exempt and taxable financing programs for faith-based and non-profit groups and is the 19th oldest investment banking firm in the U.S. Proceeds from Coughlin & Company finance schools, convents, soup kitchens, affordable housing developments, health care facilities, churches and other worthy projects. Mr. Coughlin's board memberships have included Mercy Housing Colorado, SafeHouse Denver, St. Vincent de Paul Parish Finance Council, Families of Character, and Seeds of Hope. He earned an economics degree graduate from Stanford University and a Masters in business degree from Northwestern University.

WORKSHOP DESCRIPTIONS (continued)

12 HOW TO DESIGN AND CONSTRUCT A PROJECT TO SUPPORT YOUR MISSION

Jack Kelley & Jeff Jozwiak

Are you evaluating whether your current facility meets your needs? Are you engaged in developing an overall real-estate strategy for the future of your ministry? This workshop helps participants meet the exciting challenges of growth and development and assists in facility creation.

JEFF JOZWIAK is a graduate of the University of Michigan's College of Engineering. He has worked in the construction industry for over 25 years and has managed a wide range of construction projects, including religious facilities, commercial buildings, schools, mixed-use buildings, gymnasiums, stadium alterations, high-end residences, and tenant build-outs. Jeff has worked for the Passionists, the Archdiocese of Chicago, IBM, Northwestern University, and the Museum of Science and Industry.

After graduation from the Masters Program at the University of Illinois, **JACK KELLEY** traveled throughout Europe as an Allerton Fellow. In 1986 he co-founded McBride & Kelley Architects, Limited. Jack is the Director of Design for McBride Kelley Baurer and is responsible for the programming, design and evaluation of McBride Kelley Baurer projects. Jack's clients have included the Priests of the Sacred Heart, the Passionists, St. Josaphat Parish, Lawrence Hall Youth Services, the IBM Corporation and the William Wrigley, Jr. Company.

13 THE NEW ABBREVIATED, INVESTMENT POLICY CHECKLIST: EVERYTHING YOU ARE AFRAID TO KNOW, BUT NEED TO ASK!

Margaret Mary Cosgrove, BVM & Mary Tomanek

It is important now, more than any time in the past to have a well thought out investment policy. Not sure where to begin? How to update? This session will provide a "hands on" workshop to assist those with less investment experience or formal training, in creating a document that will address the fiduciary requirements of investing as well as making sound planning and spending decisions.

MARGARET MARY COSGROVE, BVM, taught finance and accounting at Clarke University and Loras College, both in Dubuque, IA. She currently serves on the Boards of Clarke University, Catholic Charities and Catholic Charities Foundation, RCRI, the Sisters of Charity, BVM and Great Lakes Advisors. She serves on the Archdiocesan Finance Council, several investment/stewardship committees for religious congregations. She served her community as treasurer for twelve years and currently does consulting for NRRO, RCRI and other clients.

MARY L. TOMANEK, CFP®, CIMA®, is a Senior Vice President of Investments and Institutional Consulting Director with Graystone Consulting, a business of Morgan Stanley Smith Barney. Coupled with the Consulting Group's strong national presence is Mary's 25 years of experience in consulting. Mary is an IMCA Certified Investment Management Analyst℠, and has served on the Government Finance Officers Association as a Standing Member to the Committee on Benefits Administration where she participated in a variety of projects to guide policy and procedure. Mary was instrumental in developing NATRI's Investment Policy Checklist, presented at the 2007 National Conference. She earned a B.S. degree from Western Illinois University.

14 ROLES AND RESPONSIBILITIES OF BOARD MEMBERSHIP

Sr. Helen Garvey, BVM

How to bring a board meeting to life? How to change dull duty to vital engagement? This workshop demonstrates the purpose of a board and the responsibilities of membership on a board. It uses practical examples and group interaction in order to bring meaning to principles and procedures.

HELEN MAHER GARVEY, BVM, is an organizational consultant for religious congregations, parishes and schools. She is the director of the LCWR History Exhibit, *Women and Spirit: Catholic Sisters in America*. Helen held the position of Director of the Office of Pastoral Services for the Diocese of Lexington for ten years. She served in the presidency of LCWR from 1986-89 and was a U. S. Delegate to the International Union of Superiors General. She was president of the Sisters of Charity of the Blessed Virgin Mary of Dubuque, Iowa. Helen received her BA from Clarke College and her Masters and Doctorate in Organizational Development from Columbia University, New York.

15 THE PERPLEXING ISSUE: MEMBERS' PERSONAL FILES

Daniel Ward, OSB

What should be saved? What types of files? Who has access? Who controls the content? When to save and when to shred? Some answers and some suggestions.

DANIEL WARD – SEE WORKSHOP # 4.

3:30 – 4:00 p.m. Break

4:00 – 5:30 p.m. **KEYNOTE ADDRESS**

Advancing Catholic Mission and Identity: A Catholic Higher Education Perspective
Dr. Michael Galligan-Stierle

A shared goal of all Catholic institutions is their effort to find tried-and-true ways of strengthening Catholic identity and mission. Questions often focus on how to cultivate effective self-composition characteristics (identity) and how to engage in strategies that will transform society (mission). Institutes of Catholic higher education provide unique answers to the questions of Catholic identity and mission. The uniqueness results from the fact that the majority of them (200) were founded by religious communities (10 were founded by bishops and 10 by laity). Consequently, most Catholic colleges/universities are guided by the charisms of the founding religious order. Through storytelling, scripture references and audience participation, this presentation will address the successes and challenges Catholic identity/mission initiatives and suggest some enduring principles that can be used by all Catholic institutions.

MICHAEL GALLIGAN-STIERLE, PHD, has been engaged in national and international Catholic higher education issues for the last eleven years, currently as the President / CEO of the Association of Catholic Colleges and Universities, five years as ACCU vice-president and six years as the Assistant Secretary for Catholic Higher Education and Campus Ministry for the USCCB. Michael worked for thirty years in various higher education and ministerial settings as campus minister, diocesan director, theology professor, and a graduate ministry internship director. Michael's 1996 book *Gospel on Campus* is viewed as a standard for Catholic campus ministry in the U.S. His latest text, *Promising Practices: Collaboration among Catholic Bishops and University Presidents*, highlights tried-and-true ways bishops, diocesan agencies, and Catholic colleges and universities collaborate. Michael holds a Ph.D. in sacred scripture, an M.A. in psychology, and an M.A. in theology.

Free Evening

WORKSHOP DESCRIPTIONS (continued)

THURSDAY, NOVEMBER 10

7:00 – 8:30 a.m. Breakfast

8:30 a.m. Prayer

SESSION 4

9:00 – 10:30 a.m.

16 2011-2012 GOVERNMENT BENEFIT PROGRAMS UPDATE

Constance Neeson
(repeated in Session 6)

This workshop covers the latest changes in government benefit programs for 2011, with a look ahead to pending changes for 2012, including 2011 and 2012 income standards for various programs, Medicare D changes, and updates to Authorized Representative Forms for various programs. Benefit Programs discussed include: Social Security, Supplemental Security Income (SSI), Medicare A, B, C & D, Medicaid, Qualified Medicare Beneficiary (QMB), Specified Low-income Medicare Beneficiary (SLMB), the Qualified Individuals program (QI-1), the Low Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP). We will also discuss the evolving potential impact of Health Care Reform legislation (including the Affordable Care Act) for religious institutes. Information will assist the Benefit Eligibility Coordinator of each religious order in managing ongoing participation in government programs.

CONSTANCE NEESON is a Licensed Social Worker in the state of Indiana. Her ministry is assisting members of religious communities to apply for government benefits for which they are eligible. Constance holds a BA in Religious Studies from Spalding University in Louisville, Kentucky. She served as a Medicaid caseworker with the state of Indiana. Constance is currently employed as Coordinator of Consulting Services for the Benefit Eligibility Management for Religious team, a division of the Management and Financial Consulting firm of Brenner, McDonagh & Tortolani, Inc. where she and her team specialize in implementing efficient benefit eligibility management programs for religious institutes, and act as the Benefit Eligibility Coordinator for over 20 religious congregations. She is also the Health Care Manager and Benefit Eligibility Consultant for a Province of Conventual Franciscans.

17 MANAGING INVESTMENTS: PORTFOLIO BETWEEN $5 MILLION AND $30 MILLION

Tim Schwarzenberger

This session offers an overview of best practices and practical guidance for treasurers of organizations with assets between $5 million and $30 million.

Topics include:

- Establishing an Investment Policy Statement (IPS)
- Best practices in asset allocation and rebalancing
- Alternative investments
- Indexing vs. active management
- Forming and working with an investment committee.

TIM SCHWARZENBERGER – SEE WORKSHOP # 7.

18 THE BEST OF BOTH WORLDS: HIGHLIGHTING THE KEY DIFFERENCES OF TRADITIONAL SRI POLICY AND ACTIVE ESG INVESTING

Sandra Shotwell & Michael Walsh

This workshop explores the growing migration of traditional SRI (Socially Responsible Investment) policies to active ESG (Environmental, Social, and Corporate Governance) strategies. It includes the findings of a survey sponsored by J.A.Glynn in collaboration with RCRI which received more than 150 responses and provides a great deal of information on current and future trends in ESG investing. The workshop also includes an overview of the several academic studies of ESG investing and performance results.

SANDY SHOTWELL is a Vice President and has served as the Director of Marketing for J.A.Glynn since 2003. She has over 20 years of experience in the investment industry, including 9 years as an Investment Consultant

with Christian Brothers Investment Services and 6 years as an Investment Officer. Sandy is a graduate of Westminster College in Fulton, MO, serves on the board of Mercy Conference and Retreat Center and is a member of the financial advisory committee of a women's religious organization.

MICHAEL P. WALSH is a Vice President and Portfolio Manager with J.A. Glynn. He is a member of the firm's management committee and has over 30 years of experience in the investment industry. Since joining J.A.Glynn in 1980, Michael has focused on providing portfolio management services to religious institutions. His areas of expertise include socially responsible investing, investment policy consultation, expense planning and construction financing. He is a graduate of Millikin University in Decatur, IL.

19 *JUSTICE IN THE WORKPLACE:* BEGINNING THE WORKPLACE RELATIONSHIP – HIRING AND INTERVIEWING PROCESSES

Mary Jo Moran

This workshop provides practical knowledge and approaches to the hiring process with particular emphasis on interviewing challenges. Topics include: utilizing established procedures in the hiring and interview processes; satisfying legal requirements in hiring procedures and practices; asking the right questions; assuring supervisors and other interviewers possess appropriate interviewing skills; and using the 'religious EEO' exemption appropriately.

MARY JO MORAN, PHD, SPHR, is the Executive Director of the National Association of Church Personnel Administrators. Previously, she had a coaching and consulting practice where she earned a reputation of providing skilled and practical guidance as a coach, organizational development consultant and a facilitator in both the not-for profit and for profit sectors. Her areas of expertise include: executive and team effectiveness coaching, leadership and team development, organizational diagnosis, change management, and conflict management. She has worked across the USA and internationally.

20 GOVERNANCE OF A RELIGIOUS INSTITUTE

Lynn Jarrell, OSU & Nancy Reynolds, SP

This workshop considers what canon law requires for governance in a religious institute. This may be in contrast to our American way of speaking of leadership (e.g., team, collaboration, etc.). How does an institute blend the canonical concepts and the American manner of leadership? What happens if a part of the institute no longer will be part of a subdivision of the government structure but other parts will continue as provinces? Is there a requirement for the number of persons who must be in general leadership under canon law?

LYNN JARRELL – SEE WORKSHOP # 4.

NANCY REYNOLDS, SP, has served as a General Councilor and Treasurer of the Sisters of Providence, St. Mary-of-the-Woods, IN. She has a Licentiate in canon law and a Masters in mathematics. Between 1987-2001 Nancy served as Associate Director of the Tribunal for the Archdiocese of San Francisco. Since 1984 Nancy has worked with the leadership of religious institutes in the United States and beyond in the role of consultant, presenter, and teacher on a variety of topics. In addition, she has taught canon law at various schools of theology, seminaries and other programs.

10:30 – 11:00 a.m. Break

WORKSHOP DESCRIPTIONS (continued)

SESSION 5

11:00 a.m. – 12:30 p.m.

21 LIABILITY AND LAND (PART I)

Michael Airdo

Religious institutes face liability for injuries that occur to people who are present on the organization's property, even though the injuries may be solely a result of the physical aspects of the land or at the hands of another. In Part I of the presentation, Mr. Airdo will use real life examples to outline best practices for minimizing liability and how to best respond in critical situations.

MICHAEL AIRDO'S area of practice focuses on the litigation of complex civil matters, including premises cases, healthcare matters, and commercial disputes. Through his work with Christian Brothers Services, he has a broad base of experience in representing the unique legal needs of religious institutes and religiously sponsored ministries. Mr. Airdo also has extensive experience in handling premises liability matters for both retail landowners and religious organizations. He specializes in legal matters involving not-for-profit corporations, educational institutes, and mental health professionals. Mr. Airdo graduated with honor and distinction as a member of the Order of the Coif from DePaul University College of Law. He has been admitted to practice in Illinois, the United States District Court for the Northern District of Illinois, and the Northern District of Indiana. Mr. Airdo is a member of the Counsel on Litigation Management, the Illinois Association of Defense Counsel, and the Defense Research Institute.

22 AGING SERVICES: WITH GRACE AND DIGNITY (AND COST AWARENESS)

Jerry Erin, Erin George & Jerry Gumbleton

Religious Institutes are faced with increasing costs of caring for aging members while still providing quality care and quality of life. This session provides an understanding of how to develop an approach/structure to caring for aging members across the continuum, establish programs to provide home based services, evaluate retirement facilities, and benchmark/assess costs against comparative data. There will also be discussion of service models including how to develop a philosophy and approach to address the needs of members who are aging in place.

JERRY ERIN - As a partner at Plante & Moran, Jerry has assisted numerous religious communities and senior care organizations (nursing homes, retirement communities, home care and hospice) in a variety of planning, operational and organizational projects. In facilitating retirement planning activities of religious institutes, Jerry addresses issues related to delivery of care, facility capacity and environment, demographics, operations, organizational structure and financial resources/ constraints. His experience includes serving as the Chief Financial Officer for a Catholic continuing care retirement community and serving as a member of the leadership team of the mayor's task force to address long-term care issues in the city of Detroit.

ERIN GEORGE is Senior Consultant in Plante & Moran's Religious Institute Services Group. She has more than ten years' experience in the not-for-profit and long term care industries, and has been working almost exclusively with religious institutes for the past three years. She assists in providing operational reviews and strategic planning as well as financial and demographic analyses. She has managed a variety of projects assessing financial viability and identifying process improvement.

For more than 25 years **JERRY GUMBLETON** has been working with religious institutes and not-for-profit organizations including providers of services to older adults. He has significant experience working with long-term care facilities, including services to religious infirmaries, PACE organizations, and other senior service providers. He served as the chief financial officer during the development of a continuing care retirement community. He has also provided consulting assistance on a variety of issues including alliances and collaborations, reconfiguration activities, organizational reviews strategic planning, and operations analysis.

23 MANAGING CONFLICT

Dr. Richard McCorry

It is impossible to operate in a leadership role without some attendant conflict. At the same time few church leaders are trained in conflict resolution and/or management. Many times leaders respond to conflict

by ignoring it or denying its very existence. Those who respond in this way squander the gift wrapped in conflict's ugly paper. This workshop is designed to raise awareness of the different types of conflict, how best to respond to them, the gift and opportunity of conflict, and how Jesus handled conflict in his ministry.

DR. RICHARD MCCORRY is a nationally renowned presenter and the author of *Dancing with Change, A Spiritual Response to Changes in the Church* (published in 2004) and *Company's Coming, A Spiritual Process for Creating More Welcoming Parishes* (2008). He is the founder of Embracing Change, a Church change management consulting firm. Featured in St. Anthony's Messenger Magazine, Dr. McCorry travels the country, working with parishes and dioceses, helping them to develop spiritual approaches to changes in the church. He has served as senior ministry associate, director of pastoral care, and pastoral associate for various Churches, as campus minister, and worked in the Diocesan tribunal and pastoral planning department. Richard earned his Bachelor of Science degree from St. John Fisher College, a Master of Divinity degree from St. Bernard's Institute, a Master of Science degree in organizational management from Roberts Wesleyan College, and his Doctor of Ministry degree in transformative leadership from Colgate Rochester Crozer Divinity School.

24 SEPARATION FROM THE RELIGIOUS INSTITUTE

Amy Strickland

This workshop explores how to apply canon law, with justice and equity, towards members who are separating from the institute (voluntarily or involuntarily). Both exclaustration and dismissal will be addressed, along with some discussion of members who are leaving not only the institute but the clerical state.

AMY STRICKLAND – SEE WORKSHOP # 10.

25 INFLATION HEDGE: THE USE OF COMMODITIES IN A PORTFOLIO

Jim Modelski

Inflation is the most fundamental factor impacting the return of any fund. One hedging strategy against inflation is the use of commodities. During this workshop, we will review:

- the impact of inflation
- explore commodities as a strategy and asset class
- examine the risks associated with commodities and,
- discuss the use of commodities in a portfolio.

JAMES B. MODELSKI, CFS, *Principal, Senior Consultant*
Jim joined the firm in 1998 and works with institutional clients providing advice and counsel on all areas of fund oversight including spending policy, asset allocation, manager research, portfolio structure, portfolio rebalancing, performance monitoring, and overall investment policy. He is also a member of the DiMeo Schneider & Associates' Investment Committee which sets all investment policies for the firm, establishes the framework for the asset allocation and approves investment managers. Jim received an MBA, Finance and Economics from Loyola University, and a BA from Columbia College. He is a Member of the Investment Analysts Society of Chicago, the CFA Institute, The Chicago Council on Global Affairs, The Profit Sharing Council of America's (PSCA) Research Committee and The Union League Club.

12:30 – 2:00 p.m. Lunch on your own

WORKSHOP DESCRIPTIONS (continued)

SESSION 6

2:00 – 3:30 p.m.

26 LIABILITY AND LAND (PART II)

Michael Airdo

Religious institutes are often sued, even though the injuries were caused by another party. In Part II of this presentation, Mr. Airdo will focus on how to best protect your institute from liability, including transferring risk through contractual provisions and the use of additional insured certificates. Mr. Airdo will provide practical materials you can use to best protect the patrimony of your community.

MICHAEL AIRDO – SEE WORKSHOP # 21.

27 2011–2012 GOVERNMENT BENEFIT PROGRAMS UPDATE

Constance Neeson
(repeat of workshop # 16)

28 FEDERAL HEALTH CARE LEGISLATION UPDATE

Fr. Fran Dyer, OP & Bro. Michael Quirk, FSC
(repeated in Session 7)

This workshop provides attendees with updates on current developments of the PPAC Act of 2010 (Federal Health Care Legislation passed in March 2010). Emphasis will be on current status of court cases involving PPACA and on updated regulations and requirements with emphasis on how this legislation impacts Catholic employers and members of Catholic religious institutes.

FRAN DYER, OP, has been the Managing Director of Health Management Services for Religious at Christian Brothers Services for 25 years. He manages three medical payment programs, the Religious Comprehensive Trust, the Religious Community Deductible Trust and programs for Larger Religious Institutes. Father Dyer earned degrees from Loras College, Aquinas Institute of Philosophy and Theology and the University of Notre Dame. He has worked in the field of finance for Religious Orders for over 40 years and has served on various boards and commissions for the Dominican Order in Chicago and Rome.

MICHAEL QUIRK, FSC, is the President and CEO of Christian Brothers Services, a nonprofit organization that administers cooperative programs in the areas of health, retirement, property/casualty, consulting and technology for church organizations. Before returning to CB Services where he worked in risk management with Brother Joel Damian, he served as President of De La Salle Institute in Chicago. Brother Quirk earned his bachelor's and Master's degrees at Lewis University and his Ed.D. in Educational Leadership from DePaul University. He serves on various secondary school and university boards, is a member of the Church Alliance and board member of the Church Benefits Association.

29 INVESTING IN COMMUNITY DEVELOPMENT: OUR MONEY ON MISSION

Corinne Florek, OP & David Raynor and panel TBD

Religious congregations still understand and embrace the risks they take and the reason they take them: community development investments are a way to send their money on mission. Sr. Corinne and panel members will present the historical involvement of Religious congregations in community investing and their impact on communities. This workshop explains the distinction between community development investments and socially responsive investments, and also addresses the current challenges to continue this prophetic ministry.

For the past thirty years, **CORINNE FLOREK**, an Adrian Dominican Sister, has worked in the field of community economic development as a manager, educator, consultant, financial administrator, and strategic planner. Whether administering a 50-member craft cooperative in Appalachia or managing an international loan fund her work focused on using capital innovatively to empower low-income people. Corinne received an MBA from the University of Notre Dame and has worked with a number of loan funds, and with the Catholic Campaign for Human Development loan and economic development grants program. Currently Corinne manages the Mercy Partnership Fund for Mercy Investment Services, Inc. and the Religious Communities Investment Fund.

30 ELEMENTS OF A COMPREHENSIVE RETIREMENT PLAN

Sr. Janice Bader, CPPS, Bro. Bob Metzger, SM, & Br. Hank Sammon, FMS

This workshop examines the retirement concerns that are unique to religious institutes with fewer than one hundred members. We will share stories of creative solutions being employed by religious institutes around the country. We will also review the support services that the National Religious Retirement Office provides and welcome sharing by participants of their own institutes' experiences.

BADER, METZGER, SAMMON – see Pre-Conference Seminar A on Retirement Issues.

3:30 – 4:00 p.m. Break

4:00 p.m. Eucharist

Free evening

FRIDAY, NOVEMBER 11

7:00 – 8:30 a.m. Breakfast

SESSION 7

9:00 – 10:30 a.m. SESSION 7

31 SOCIAL MEDIA I: INTRODUCTION

Sr. Amy Hereford, CSJ

Whether you're well on your way with social media such as interactive web-based communication, such as blogs, Facebook or Twitter or just exploring this new frontier, chances are you have questions. This workshop introduces the tools and concepts and explores usage, best practices, challenges and tips.

AMY HEREFORD is a Sister of St. Joseph. She has been in religious life for over 30 years and has served in a variety of ministries, in education, in administration and in communication. She has degrees in science, communication, and theology, as well as in civil and canon law. Amy has worked in the nonprofit world for over 30 years, beginning in operations, moving into management and administration and then into consulting. This experience helps her assist religious institutes with their legal needs, help those who are making important choices about the future of their institutes, assist organizations in strategic development, and help clients maximize their resources for the sake of their mission.

32 FEDERAL HEALTH CARE LEGISLATION UPDATE

Fr. Fran Dyer, OP & Bro. Michael Quirk, FSC
(repeat of workshop # 28)

33 FOUNDATIONS AND TRUSTS

Janet Hoehnen

What is a Foundation and does your religious institute need one? This session explores the uses for a Foundation and discusses the ways to organize a Foundation using a trust and methods for its orderly administration. The distinction between a private foundation and a public charity will be reviewed and including a discussion of tax issues related to Foundations.

JANET HOEHNEN has been practicing law for the last 30 years with the Milwaukee, Wisconsin firm of Lichtsinn & Haensel, S.C. She is the Managing Shareholder and her practice is primarily in the areas of taxation, estate planning, and probate. She is also a Certified Public Accountant. Ms. Hoehnen served as the Trustee of her parish for over 10 years; she taught Law and Parish Administration to pastors and parish administrators at the St. Francis Seminary; and taught in a Masters in Business Administration program through the Keller Graduate School of Management. She has done extensive legal work in the not for profit area including representation of religious orders. She serves on the board of directors of several grant making foundations and has helped create a number of new public charities doing a variety of educational, scientific and charitable work.

WORKSHOP DESCRIPTIONS (continued)

34 TAXES UPDATE

Donna Miller

Each year RCRI's staff responds to various issues. This workshop highlights some of the more frequent tax issues and other "high-impact" questions from the last year.

DONNA MILLER – SEE WORKSHOP # 2.

10:30 – 11:00 a.m. Break

SESSION 8

11:00 a.m. – 12:30 p.m.

35 SOCIAL MEDIA II: LEGAL ISSUES

Sr. Amy Hereford, CSJ

Whether you're well on your way with social media or just exploring this new frontier, chances are you have questions. This workshop will identify the main legal and ethical issues as well as the dangers and opportunities associated with social media. It offers practical guidelines and discusses policy development.

AMY HEREFORD – SEE WORKSHOP # 31.

36 ADVANCED TOPICS IN ACCOUNTING

Kellie Goines & Sue Novak

This presentation provides an overview of recently issued accounting pronouncements and issues regarding:

- Variations in Accounting and Reporting
- Investment Disclosures
- Alternative Investments
- Securities Lending
- Derivatives and Hedging
- Endowments
- Reconfiguring Communities
- Common Areas of Confusion
- Proposed Changes to Accounting for Leases
- Accounting for Uncertainty in Income Taxes

It is designed for individuals interested in learning about implications of accounting and auditing standards affecting religious congregations at a moderate to advanced level. The presentation includes a variety of topics that will help participants to identify potential issues to be addressed in their community.

KELLIE GOINES is a senior manager with 10+ years of experience, who has served over 100 not-for-profit and religious organizations in accounting, auditing, tax and management consulting. She is a member of the Firm's professional standards department, with responsibility for providing quality control reviews of not-for-profit financial statements. She has consulted with various not-for-profit organizations with respect to implementation of new auditing and accounting standards. Kellie serves as a firm-wide technical resource to engagement teams to resolve auditing and accounting issues within the not-for-profit industry group. Kellie coordinates, and is a presenter at, internal and external not-for-profit technical trainings.

SUE NOVAK has more than 25 years of experience in the not-for-profit industry. She has provided accounting, auditing, tax and management consulting services to a variety of not-for-profit organizations and religious congregations. She has worked with more than 75 religious congregations throughout the United States and internationally on financial statement audits, analyses of congregation resources, planning and operations. Sue is a partner in the Not-for-Profit Services Group of Plante & Moran, PLLC and has had responsibility for the development of their standard audit programs for not-for-profit organizations. She has presented on technical accounting issues at RCRI, NATRI, LRCR, national, state, and firm not-for profit education seminars.

37 HIRING CATHOLIC

Travis Kearbey & Mary Reichert

Title VII of the Civil Rights Act has prohibited employment discrimination based on religion for nearly 50 years; however, some important exceptions to the federal ban on religious discrimination exist for certain religious organizations and religious education institutions. *Hiring Catholic* will explore the factors relevant to determining whether an entity falls within Title VII's exception for religious employers who wish

to exercise a religious hiring preference in their hiring decisions. The presentation also addresses the limits to the religious hiring preferences allowed under Title VII, answering the question of whether a hiring preference may be made for any member of the Catholic faith or whether it must be more narrowly tailored. Finally, *Hiring Catholic* provides an update on recent developments in case law regarding the "ministerial exception" to federal employment discrimination laws.

TRAVIS KEARBEY practices primarily in the areas of labor and employment law and is a member of the Labor and Employment Client Service Group at Bryan Cave, LLC. Mr. Kearbey's labor law experience includes representing clients in grievance arbitrations, in litigation arising under the Labor Management Relations Act, and in matters before the National Labor Relations Board. His employment litigation experience includes representing employers in defense of claims of retaliation, and age, disability, race, national origin, religion and sex discrimination, as well as, claims of Fair Labor Standards Act and Family Medical Leave Act violations. Moreover, Mr. Kearbey has handled matters before numerous administrative agencies, and has in-house counsel experience as Senior Counsel, Labor and Employment for a Fortune 100 company.

MARY REICHERT'S practice areas include municipal finance, tax-exempt organizations and specialized employee benefit matters including government pension plans and employee stock ownership plans at Bryan Cave, LLC. Ms. Reichert has worked with the National Office of the IRS in connection with ruling requests for tax-exempt organizations, including organizations with special needs in health care and affiliated group structures. She has significant experience in bankruptcy and workout matters and advising indenture trustees relating to tax-exempt financing transactions. In addition to her financing practice, she is a member of the National Association of Bond Lawyers and is a frequent panelist at NABL workshops on public finance, including tax enforcement panels.

38 FINANCING CAPITAL PROJECTS: SIGNPOSTS OF "THE NEW NORMAL"

Lynn Daly & Sr. Rose Jochmann, OSF

This session explores signposts of "The New Normal" that are impacting all aspects of financing capital projects. Changing economies, the banking crisis and new regulations are altering the financing 'playing field.' With fewer banks lending, understanding "The New Normal' is vital to best position yourself to maximize your financing options. It provides data to show how changes have impacted religious communities, including a case study on a current financing for the Green Bay Franciscans.

LYNN DALY is a Senior Vice President with Ziegler Capital Markets – Senior Living Finance, with over 19 years experience in financial services with not-for-profit organizations. Lynn is spear-heading Ziegler's Catholic Initiative within Senior Living Finance. She specializes in underwriting both tax-exempt and taxable bond financings for Catholic senior living communities, Catholic dioceses and religious orders. Lynn also served as Senior Vice President at Allied Irish Bank, where she worked with not-for-profit organizations with bond and loan financings; was head of Allied Irish Bank's Chicago Office; and managed approximately $1 billion in assets with not-for-profit customers. Lynn graduated from Kalamazoo College with a Bachelor of Arts in Economics and received her Masters of Management with a focus on Marketing, Finance and Health Services Administration from Northwestern University's Kellogg Graduate School of Management.

SISTER ROSE JOCHMANN, OSF, has been the Community Treasurer of the Sisters of St. Francis of the Holy Cross for the past 28 years. In her long tenor, she has been part of various pivotal decisions related to her community including the initiation of a Capital Campaign, the building of a new Motherhouse, and the financing of the new Motherhouse with tax-exempt bonds. Sister Rose has served as chairperson of WITRI, a member of the Wisconsin Corporate Responsibility Program, and a Board member and treasurer of LCWR. She obtained her BS from St. Norbert College in De Pere, Wisconsin and her Masters of Science in Administration for non-profit organizations from the University of Notre Dame.

THE RESOURCE CENTER
FOR RELIGIOUS INSTITUTES

CONFERENCE REGISTRATION

WORKSHOP AND MEAL SELECTIONS

Review the Conference Registration information and select the workshops and hospitality events you plan to attend. Your selection assists RCRI in providing adequate room assignments, hand-outs, and meal guarantees. Food functions listed on the registration form are included in the registration fee. Continental breakfasts are available Wednesday and Thursday; on Friday there will be a hot buffet-style, sit-down breakfast. *Please carefully select which meals you will actually attend, as RCRI incurs the expense regardless of your presence.*

CONFERENCE FEE AND REGISTRATION DATES

Please register using our on-line form available at **www.trcri.org** under "Programs." Registration is available through October 14, 2011, but save $50.00 by registering early!

	BEFORE 9/9	AFTER 9/9*
RCRI members rooming at the Hyatt Regency*	$430	$480
RCRI members not staying at the Hyatt Regency*	$500	$550
Those who are not RCRI members	$800	$850

RCRI members include all members and employees of religious institute with paid 2011 membership in RCRI, not just 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.

Seminar A and B are for additional fee – please see website for registration.

CANCELLATION POLICY

- For written cancellations before October 7th, 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 October 8th and October 3lst.
- On or after November 1st, no refund will be made.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by registered attendee, naming his/her substitute.

POLICY FOR GUESTS

There is a $120 charge for RCRI conference guests. Guests are welcome to attend all food functions for which they are registered and will be allowed in the Exhibit Hall if properly identified with a name badge. Guests are not permitted to attend workshops.

CONFERENCE SITE

The 2011 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
FAX: 314-241-6618

YOUR HOTEL ROOM IS NOT INCLUDED IN THE CONFERENCE REGISTRATION FEE.

HOTEL RESERVATIONS

SPECIAL RATES FOR RCRI CONFERENCE ATTENDEES

The hotel rate of $129 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 October 25, 2011.**

Direct reservations to the hotel will not be awarded at the RCRI discount rate.

RESERVATIONS

All reservations must be made through the Nix & Associates online reservation system; a link is on the RCRI website, **www.trcri.org** under Programs. Credit card information is required when making your reservation. ***The first night's deposit is required at time of booking.*** If sharing a room, please register each individual by name on the registration form to be assured of the discounted RCRI conference registration fee. Special needs should clearly be identified on the hotel reservation form.

When you click the 'Submit' button, your hotel reservation will be transmitted to Nix & Associates on a secure website which protects your identity and information. For other inquiries, contact Nix at **registrar@nixassoc.com** or phone toll free 800-266-0866, or 314-645-1455. All guests with confirmed reservations will be accommodated.

HOTEL AMENITIES

The Hyatt Regency offers complimentary Wi-Fi in the hotel lobby and restaurant outlets; and each guest room has wireless internet available for approximately $13.00/per day (***subject to change***). They have a full service business center and provide several on-site dining options. All meeting areas are accessible by elevator and escalator. The hotel has an extensive fitness center, but no swimming pool.

TRANSPORTATION

AIRPORT

The nearest airport is **Lambert St. Louis International Airport** (STL) located 15 miles from the Hyatt Regency at The Arch. The hotel does **not** provide shuttle service.

BY CAR FROM AIRPORT . . .

By car from Lambert St. Louis International Airport: Take I-70 East to Memorial Drive exit. Go straight on Memorial Drive. Turn right onto Market Street. Turn right onto North 4th Street. Turn right onto Chestnut Street. Hotel is on the left.

Enterprise Rent-A-Car is available at the St. Louis Hyatt Regency at The Arch. Located next to the front desk. For hours and information, call 314-436-7100.

BY TAXI FROM AIRPORT . . .

Approximately $45.00 each way.

Richardson Transportation: 314-725-9111 (prefer 24- hour notice) or Harris Cab (some extra charges may apply): 314-535-5087 or 314-371-7111.

BY METROLINK FROM AIRPORT . . .

Cost: $3.50 each way.

A light rail train system connects the main and east terminals of Lambert International Airport to the downtown area. Closest station the Hyatt Regency is located at 8th and Pine Street. Walk east on Pine to the hotel located on 4th and Pine Streets. Enter through the 4th street entrance.

Total travel time is approximately 30 minutes. The trains run every 30 minutes 5:00 a.m. to midnight. Not recommended for people with heavy or large amounts of luggage as there is a 4-block walk to the hotel.

BY SHUTTLE FROM AIRPORT . . .

Cost is $17.00 per person one way, or $32.00 roundtrip.

GoBest Express is offering the RCRI conference participants a special group rate as shown above. A link will be placed on our website for reservations.

GoBest Express shuttle locations at St. Louis airport are:

- Main Terminal 12, near American Airlines, baggage carousel # 2.
- Main Terminal 17, near the USO and baggage carousel # 6.
- East Terminal 12 by the baggage area.

AMTRAK

The Amtrak station is located at 550 South 16th Street, 8 blocks from the hotel. A taxi from there is approximately $8.00.

DRIVING AND PARKING

- Overnight valet parking at the Hyatt: $26.00, plus tax & tip
- Overnight self-parking at the Hyatt (limited availability): $20.00, plus tax
- Economy parking at the Mansion House Garage: $8.00 Mon-Friday / $3.00 Sat & Sun.

  Located on 4th Street directly behind the Hyatt.

  No in/out privileges.

  Payable on exit with ***cash only***; charges **cannot** be billed to your guestroom.

OTHER INFORMATION

OTHER INFORMATION

CONTINUING PROFESSIONAL EDUCATION UNITS - (CPES & CLE'S)

For those who require CPE credits, following the conference please submit your request for RCRI verification of attendance. We will send you a letter of verification that will include a list of workshops for which you registered and attended.

For those who require CLE credits, there is a $75 fee. There is a separate on-line registration form for CLE's, on this form, please include your State and License number. We are seeking CLE credits for the following events: One hour of the pre-Conference seminar Basic Elements of a Comprehensive Retirement Plan. Workshop numbers 2, 5, 14, 16, 19, 21, 26, 31, 32, 33, 34, 35, and 37. If you have questions, contact Sabrina Hidalgo, **shidalgo@trcri.org** or 301-587-7776.

CORT MEETINGS

A space will be provided for CORT's that request to meet during Wednesday's lunch period. Please contact Sabrina Hidalgo at **shidalgo@trcri.org** to request space.

AUDIO TAPES AND WORKSHOP HANDOUTS

Audio cassette tapes and CDs of the workshops, updates and general sessions will be available for purchase immediately following the presentations. DVDs will be available for the Keynote Addresses as well. To order copies after the conference, call GEM TAPES at 806-797-9608.

EXHIBITOR INFORMATION

EVENT SPONSORSHIP

RCRI is grateful to any organization that can sponsor a speaker, a meal or a break as it helps us offer a more affordable conference to religious institute members and employees. Sponsorship information will be posted on our website along with other exhibitor information. Please contact Sabrina Hidalgo, **shidalgo@trcri.org** or 301-587-7776 for more information.

EXHIBIT INFORMATION

See exhibitor materials on our website **www.trcri.org** for booth fees, registration forms, sponsorship opportunities and cancellation policy. Contact Nix & Associates, Inc. at 314-645-1455 and mention the RCRI conference for more information. To assure inclusion of information in conference materials, please register by October 3, 2011.

THE RESOURCE CENTER
FOR RELIGIOUS INSTITUTES

8824 Cameron Street

Silver Spring, MC 20910

www.trcri.org