

CHANGING TIMES



2009

NATIONAL CONFERENCE

Atlanta Georgia Hilton Hotel October 20-23

Resource Center
for Religious Institutes
..... formerly NATRI and LRCR

R E G I S T R A T I O N I N F O R M A T I O N

TUESDAY OCTOBER 20

PRE-CONFERENCE WORKSHOPS

- 9am-3pm **TRENDS for Beginners**
—Laura Reicks, RSM
- 9am-3pm **Life after TRENDS for Leadership**
—Hertha Longo, CSA, Margaret Mary Cosgrove, BVM & Claire Blohm
- 9am-3pm **The Impact of New Religious Immigration Regulations on Religious Orders**
—Anne Marie Gibbons & Miguel Alberto Naranjo
(pre-conference workshops have separate registration forms, please see inserts for more information)
- 11am-3pm **Exhibitor Set-up**
- 1pm-3pm **Small Communities Gathering**
—M. Rochelle Guertal, OSST
- 3pm **Exhibits Open/Attendee Registration Opens**
- 5:30pm-6:45pm **General Session—Prayer and Keynote Change! Hope! We the People One Year Later**
—Simone Campbell, SSS
- 7pm-8:30pm **Reception**

WEDNESDAY OCTOBER 21

- 7am **Eucharist**
- 7:30am-8:30am **Continental Breakfast** (Exhibit Hall)
- 8:45am **Opening and Announcements NRRO and RCRI Updates**
—Janice Bader, CPPS & Hertha Longo, CSA
- 10:15am **Break** (Exhibit Hall)
- 10:45am **Keynote Address “Religious Life and Charism: Navigating the Seas of Turbulent Change”**
—Dominic Izzo, OP & Mary Waskowiak, RSM
- 12:30pm **Lunch**
(Leadership and Treasurers based on CORT regions)
- 2pm-3:30pm **Session I—Workshops**
1. Human Resources Issues in Troubled Times
—Pamela Mott
 2. “And God Saw That It Was Good” Saving the Earth and Saving a Buck—Dan Misleh
 3. Coping with Difficult Members—Donna Markham OP
 4. Advanced Topics in Accounting—Sue Novak
 5. Introduction to Government Programs “All Things Work Together”—Constance Neeson
- 3:30pm **Break**
- 4pm-5:30pm **Session II—Workshops**
6. Adding Value: What Investors Should Know About Evaluating Investment Manager Performance
—Kathleen Hegenbart
 7. Policies on Mental Health Care and Addictions Treatment—Donna Markham, OP
 8. Fiduciary Education: Becoming an effective and informed investment committee member
—Christopher Cahill & Scott Santin
 9. Positioning Yourself in Today’s Market Environment
—Mark O’Donnell & John Simmons
 10. Introduction to Government Programs—“All Things Work Together”—Constance Neeson (CONTINUED)

Free Evening



THURSDAY OCTOBER 22

- 7:30am-8:30am **Continental Breakfast** (Exhibit Hall)
- 8:45am **Prayer**
- 9am **Major Address**
Future Ecclesial Relationships: Institutes and the Universal Church—Lynn Jarrell, OSU & Daniel Ward, OSB
- 10:15am **Break**
- 10:45am-12:15pm **Session III—Workshops**
11. Justice in the Workplace, Beginning the Workplace Relationship—Hiring and Interviewing Process—Mary Jo Moran
 12. Legal and Financial Audits for Small Communities—Kathleen Kalinowski, OSB & Donna Sauer
 13. Associates/Co-Members: Boundaries of Membership in a Religious Institute While Honoring Relationships and Shared Values for Living the Charism—Lynn Jarrell, OSU
 14. Risk Management 101—Roger Duffield
 15. Is Our Religious Institute Viable?—Janice Bader, CPPS & Ann Carville, OSF
- 12:30pm **Lunch**
- 1:30pm-2:45pm **Session IV—Workshops**
16. Building or Renovating Green: Why Not?—Catherine Cruickshank of Hoffman and Neal Smith
 17. Investing: Back to the Basics—Eileen O’Connell
 18. Growing in Wisdom, Grace and Age—Janice Bader, CPPS & Robert Metzger, SM
 19. Implementing FASB 157 Fair Value Measurements, FASB 158 Postretirement Plans and FSB FAS 117-1 UPMIFA—Phil Capps, Pam McClelland & Kate Ward of Kerber
 20. Financial Orientation for Leaders—Hertha Longo, CSA & Keith Zekind
- 2:45pm **Break**
- 3:15pm-4:30pm **Session V—Workshops**
21. Inflation and Real Assets—Carolyn LaRocco
 22. Impacting Mission: Developments in Development—Georgette Lehmoth, OSF
 23. The Small Portfolio—Rochelle Guertal, OSST & Kathleen Kalinowski, OSB
 24. A Treasurer’s Guide to Financial Education of New Leaders—Clare Lorenzatti
 25. Financial Orientation for Leaders (continued)—Hertha Longo, CSA & Keith Zekind
- 5:15pm **Eucharist**
- Free Evening**

FRIDAY OCTOBER 23

- 7am-8:30am **Breakfast**
- 8:30am-8:45am **Prayer**
- 9am-10:15am **Session VI—Workshops**
26. The Pleasure of Payroll and Other Workplace Issues—Susan Arvanitis, CPA
 27. Taxes and Other Legal Issues—Donna Sauer
 28. Going Non-Canonical—Neal Smith, Mary David Walgenbach, OSB & Dan Ward, OSB
 29. Employment Law—Andrew Kopon, JD
- 10:15am **Break**
- 10:45am-Noon **Session VII—Workshops**
30. Hiring Lay Management Personnel for Religious Communities—Patrick Croke & Donna Lamberti
 31. TRENDS Assumptions: Reflecting the Economy’s Fluctuations (for experienced TRENDS users)—Laura Reicks, RSM
 32. Conference Evaluation through the Lens of Small Communities Treasurers and Leadership—Mary Rochelle Guertal, OSST
 33. Interviewing Potential Employees (repeat of Workshop #11)—Mary Jo Moran
 34. Employment Law (continued)—Andrew Kopon JD
- 12:15pm **Finis**

TUESDAY OCTOBER 20

Small Community Gathering

Sr. M. Rochelle Guertal, OSST

1pm-3pm

This free pre-conference seminar is geared to communities with 50 members or fewer who, at times, have found the Conference overwhelming. Presentations involving “Alphabet soups” and advanced topics in accounting, investments and forecasting do not serve their needs. In this gathering, these communities will be assisted in selecting workshops that will meet the requirements of the smaller finance office and better serve their educational needs. A follow-up session on Friday is planned for the members of small communities to evaluate their conference experience. Finance office and leadership personnel are invited to attend.

Keynote Address

5:30pm-6:45pm

Change! Hope! We the People One Year Later

Simone Campbell, SSS

In November 2008, the United States elected a new administration with a clear mandate for change. Following the election, the nation and world plummeted into a recession. Almost a year later, we are seeing the outlines of a new way forward. With a mix of analysis and poetry, Simone will address the opportunities that exist, the challenges ahead and how religious congregations might have some new tools for mission. The political conflicts are daunting, but our nation and world needs all of us engaged in governance for the common good.

WEDNESDAY OCTOBER 21

Keynote Address

10:45 am

Religious Life and Charism: Navigating the Seas of Turbulent Change

Dominic Izzo, OP & Mary Waskowiak, RSM

In their keynote Dominic Izzo, OP and Mary Waskowiak, RSM invite listeners into their reflection on the experience of religious life and its charism as it negotiates the seas of the twenty-first century. How do religious women and men navigate the restless waves in Church and Society, and how does this affect the way religious manifest their charism and engage in mission? What encouragements and challenges are set before religious women and men when they announce that Jesus Christ is the anchor on the seas of turbulent change and that the disturbing winds tossing them about on the sea can be the breath of God’s ever-creative Spirit? Finally, based on their reflection the speakers will encourage the listeners to discuss how they can navigate the particular seas of change on which they find themselves. In what ways might their experience provide practical opportunities for influencing how they manifest religious life and its charism in the twenty-first century?

Session I — Workshops

2pm-3:30pm

Workshop #1: Human Resources Issues in Troubled Times

Pamela Mott

This session will address the complexity of human resource issues during challenging economic times, including reductions-in-force, compensation and benefit strategies, and maintaining employee morale.

Workshop #2: “And God Saw That It Was Good” Saving the Earth and Saving a Buck

Dan Misleh

This workshop will explore Catholic teaching on the environment especially in light of climate change highlighting the virtue of prudence, the demands of the poor, and the pursuit of the common good. Practical and programmatic approaches will include the Catholic Climate Covenant project and ways in which religious institutes have been at the forefront of caring for God’s creation and the tools and techniques they have employed to walk more gently on the earth.



Workshop #3: Coping with Difficult Members

Donna Markham, OP

This workshop will assist participants to understand the underlying dynamics of members who consistently present challenges to those in leadership and will teach participants strategies for intervention. Participants will apply strategies to situations in which they are currently involved.

Workshop #4: Advanced Topics in Accounting

Sue Novak

Presentation objectives include a discussion of the learning's from the recently implemented auditing standards and implications for the audit process and control environment. In addition, we will review financial statement reporting variations, accounting and reporting for merged/consolidated communities, and common areas of confusion in accounting and reporting.

Workshop #5: Introduction to Government Programs — “All Things Work Together”

Constance Neeson

This seminar will cover a description of the **scope of all government benefit programs**, the **range of benefits** and the **basics of benefit eligibility criteria** for various Government Programs, including: **Social Security** (RSDI), **Supplemental Security Income** (SSI), **Medicare** (including Medicare Part A and B, Medicare Advantage plans, and Medicare D), the **Low Income Subsidy** (LIS or “Extra Help”) program, and **Medicaid** (full-coverage, QMB, SLMB). Topics will include distinguishing what is considered to be countable as income and assets when applying for benefits, usage of authorized representative forms, and utilizing “shortcuts” in the benefit application process. Also included will be the latest changes from 2009 and projections of coming benefits changes for 2010. The presenter will also discuss methods for creating and implementing a plan for managing benefit eligibility within a religious community. The information provided will assist the person responsible for benefit eligibility coordination in each religious congregation to manage a comprehensive program of participation in government programs.

Session II — Workshops

4pm-5:30pm

Workshop #6: Adding Value: What Investors Should Know About Evaluating Investment Manager Performance

Kathleen Hegenbart

After a time of historic market dislocation and investment decline the question arises: “To what do we attribute the losses we experienced? Was it market failure or investment failure as

well?” Without satisfactory answers, these lingering questions can create unresolved ‘performance anxiety’ for investors and investment committees alike. To position better for the next cycle, this workshop will layout a best practices step by step process for unbiased measurement of investment manager performance, for the discovery of top tier talent and for the avoidance of the unskilled who reside among them.

Workshop #7: Policies on Mental Health Care and Addictions Treatment

Donna Markham, OP, PhD

Difficulties often arise concerning confidentiality and privacy in matters of a member’s psychotherapeutic or addictions treatment. Often, religious leaders find themselves at a loss to determine the efficacy of the treatment, the appropriateness of the type of treatment and the length of care. A sample policy for the use of religious communities in the provision of mental health care and addictions treatment will be presented and explained.

Workshop #8: Fiduciary Education: Becoming an Effective and Informed Investment Committee Member

Christopher Cahill & Scott Santin

A lack of “effective oversight” is the most commonly accepted reason for this past year’s economic stress. The effectiveness of board members and those with oversight responsibility was seriously deficient. This workshop will provide best practices and basic “need to know” concepts for committee members to use when reviewing portfolios. Areas of focus: optimal oversight procedures, risk management, manager evaluation, and portfolio structure/investment vehicles.

Workshop #9: Positioning Yourself in Today’s Market Environment

Mark O’Donnell & John Simmons

Presents the research of Morgan Stanley’s Asset Allocation and Investment Strategy Group to review the economic and market events that have taken place over the last year. Explains how these economic and market forces have affected investors and provides insight as to what should be considered when positioning institutional portfolios for the future. Reviews Morgan Stanley’s Asset Allocation strategies including allocations into traditional as well as alternative investments. Discusses the merits of these asset classes within an institutional investment portfolio.

Workshop #10: Introduction to Government Programs — “All Things Work Together” (continued)

Constance Neeson



THURSDAY OCTOBER 22

Major Address

9am

**Future Ecclesial Relationships:
 Institutes and the Universal Church**

Lynn Jarrell, OSU & Daniel Ward, OSB

In the history of religious life, the relationships between religious institutes and the universal church has varied according to the times, the issues and the cultures. Now in the 21st century, relationships continue to shift as religious institutes adjust their ways of life and ministries to the needs of the present American society. These shifts can at times cause tensions between institutes and the universal governance of the Church. Yet these tensions can add positively to the development of religious life and assist the universal Church in adapting itself to the changing times. The presenters will address some of the shifts and tensions that are taking places: including relations with Roman congregations, positive collaboration between institutes and the Roman congregations in adapting to the changing culture, methods of resolving tensions through dialogue and process, and possibilities of new forms of religious life.

Session III — Workshops

10:45am-12:15pm

**Workshop #11: Justice in the Workplace, Beginning the
 Workplace Relationship-Hiring and Interviewing Process**

Mary Jo Moran

This workshop will provide practical knowledge and approaches to the hiring process with particular emphasis on interviewing challenges: including 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.

**Workshop #12: Legal and Financial Audits
 for Small Communities**

Kathleen Kalinowski, OSB & Donna Sauer

Smaller numbers of members and fewer assets are common in small religious communities. What, if anything, is different for smaller communities when it comes to legal and financial audits? This workshop will focus on special considerations and essential elements for small communities when they experience either a legal or a financial audit.

**Workshop #13: Associates/Co-Members: Boundaries
 of Membership in a Religious Institute While Honoring
 Relationships and Shared Values for Living the Charism**

Lynn Jarrell, OSU

Defining Associates/Co-Members in light of their relationship to the Professed can limit the nature and scope of such groups. Clarity, both in wording and actions, needs to be maintained in the distinctions between the commitments made by the Professed and the Associates/Co-Members. This seminar will explore these distinctions from the perspective of religious institutes to raise the discussion: Is the Associate/Co-Member commitment part of a new expression of consecrated life which needs to be nourished?

Workshop #14: Risk Management 101

Roger Duffield

This interactive seminar will review the risk management process and identify common causes of claims for Catholic religious orders in the areas of property, general liability, auto and workers compensation. In addition, the presenter will include numerous low cost/no cost ideas to reduce claims and improve an organization's risk management program. Attendees will receive a CD with resources that can be put to use within their own organizations. This seminar has been presented at the RCRI Orientation workshop for the last three years and has been met with great response.

Workshop #15: Is Our Religious Institute Viable?

Janice Bader, CPPS & Ann Carville, OSF

This workshop will explore the elements of viability as defined in the LCWR/NATRI/NRRO documents, *A Critical Juncture, Assessing the Viability of Religious Institutes*. It has been thirteen years since these documents were published. Where are religious institutes today along the spectrum of viability? Have we made progress? What are the current challenges that need to be addressed if we are to remain viable?

Session IV — Workshops

1:30pm-2:45pm

Workshop #16: Building or Renovating Green: Why Not?

Catherine Cruickshank of Hoffman and Neal Smith

Why would a small women's Benedictine community in Madison, Wisconsin, choose to build one of the "greenest" buildings in the United States? How did they do this in a fiscally responsible manner and what lessons from their experience can other religious communities apply to their own construction projects?

If you have dismissed the idea of building green because you believe the cost is prohibitive, this informative workshop may change your mind.



Workshop #17: Investing: Back to the Basics

Eileen O'Connell

This workshop will offer some practical education designed to help those less familiar with the world of investments, including new Treasurers, former LRCR members interested in learning more about investing, or anyone interested in a refresher course on the basics of investing. Topics include:

- Stocks and bonds-the basics;
- Determining cash flow needs;
- Establishing an investment policy;
- Dealing with turbulent markets; and
- Best practices in the investment process.

Workshop #18: Growing in Wisdom, Grace and Age

Janice Bader, CPPS & Robert Metzger, SM

This workshop will focus on the period of life sometimes known as “retirement.” It will include discussion of criteria for leaving full-time, compensated ministry and retiring to other meaningful, age-appropriate endeavors. How do religious prepare for retirement? When is it appropriate for religious to retire? How do religious find meaning in this period of life? What is the focus of elderhood?

Workshop #19: Implementing FASB 157 Fair Value Measurements, FASB 158 Postretirement Plans and FSB FAS 117-1 UPMIFA

Phil Capps, Pam McClelland & Kate Ward

Discusses the new hierarchy of fair value measurements, the impact on financial reporting and assets and liabilities commonly measured at fair value in the financial statements. Additionally, addresses what constitutes defined benefit pension and other postretirement plans and what should be recognized in the financial statements, and discusses implementation of the Uniform Prudent Management of Institutional Funds Act of 2006 (UPMIFA).

Workshop #20: Financial Orientation for Leaders

Hertha Longo, CSA & Keith Zekind

This workshop will focus on the basic principles of finance and stewardship for leaders of religious institutes. The topics to be discussed include stewardship responsibility; the relationship between the leader and the finance officer; reading and interpreting financial statements; best practices for financial stewardship; overseeing the investment portfolio; assessing retirement need; planning for the future of the institute; and a just a touch of TRENDS. Workshop participants will be encouraged to interact with the presenters and the other workshop participants.

Session V — Workshops

3:15pm-4:30pm

Workshop #21: Inflation and Real Assets

Carolyn LaRocco

The workshop introduces you to Inflation and Real Assets: What is Inflation? What are inflation hedges and real assets (Infrastructure, Commodities, and Private Real Estate)? What impact does inflation have on investment portfolios? What impact do real assets have when added to a portfolio of financial assets? The seminar will provide a basic primer of Inflation and Real Assets, review the incorporation of real assets into an asset allocation, and discover the value they add through diversification (risk reduction). It will discuss the application of social restrictions to these investments.

Workshop #22: Impacting Mission: Developments in Development

Georgette Lehmuth, OSF

What are some major concerns for development offices of religious institutes today in the light of our current economic situation? How do congregational mergers impact development efforts? This session will offer concrete examples and applicable recommendations to address changing internal and external environments in religious institutes in terms of best fundraising practice.

Workshop #23: The Small Portfolio

Rochelle Guertal, OSST & Kathleen Kalinowski, OSB

This workshop is designed to equip participants with tools that promote good stewardship of financial assets. It will focus on tools to create a plan for management of assets to assure future viability such as essentials of an investment policy statement and options available for religious institutes with very limited financial resources.

Workshop #24: A Treasurer's Guide to Financial Education of New Leaders

Clare Lorenzatti

One of the responsibilities of a CFO/Treasurer is orientating new leaders to the financial and legal environment in which they must function. Because new leaders enter this environment immediately upon being installed, it is imperative that the CFO begin instructing them on the most critical financial and legal topics as soon as possible. This workshop will present an outline of topics to be included along with a timeline for the completion of this orientation process.

Workshop #25: Financial Orientation for Leaders (continued)

Hertha Longo, CSA & Keith Zekind



FRIDAY OCTOBER 23

Session VI — Workshops

9am-10:15am

Workshop #26: The Pleasure of Payroll and Other Workplace Issues

Susan Arvanitis

This workshop is designed to cover several issues commonly raised in the workplace that the finance office may be called upon to resolve. Topics covered include how to distinguish between an employee and an independent contractor, how exempt and nonexempt workers are defined under the Fair Labor Standards Act, and what pitfalls to avoid when your employees want to volunteer time to your organization. In addition, we will discuss the taxation of various types of employee compensation, such as gifts, fringe benefits, and personal use of business assets, the proper way to substantiate employee business travel, and other best practices in the workplace.

Workshop #27: Taxes and Other Legal Issues

Donna Sauer

One of RCRI's services is responding to specific questions posed by members. Each year we provide this workshop to address some of the more frequently asked questions, as well as many issues which are timely in nature. Recent federal legislation has affected employment law, such as COBRA subsidies, as well as other aspects of the law that affect both leadership and treasurers. In this workshop you will hear about many of the legal issues that have affected religious institutes and individual members in the past year.

Workshop #28: Going Non-Canonical

Neal Smith, Mary David Walgenbach, OSB & Dan Ward, OSB

The story of a small Benedictine community's journey of becoming non-canonical. The content includes their ecumenical ministry, visioning process, development of an ecumenical board, relationship with the Federation of St. Gertrude and canonical and civil procedures for the transfer of assets.

Workshop #29: Employment Law

Andrew Kopon, JD

This workshop will provide attendees:

- An overview of Title VII and Discrimination Law
- Preventative employment measures
- Tips for Drafting Employee Handbooks and Workplace Policies
- Fair Labor Standards Act—An overview

Session VII — Workshops

10:45am-12:15pm

Workshop #30: Hiring Lay Management Personnel for Religious Communities

Patrick Croke & Donna Lamberti

Religious communities often find themselves without qualified members to serve in capacities dealing with human resources, properties management, technology, and especially finances. This workshop is for communities considering hiring lay administrators to fill these types of management positions. We will address topics such as: What should be considered in hiring such a person? What advantages and drawbacks will there be to having these positions filled by someone from outside the institute? What will the new person need to know about working for a religious and what does the religious need to be aware of in hiring a lay person in these roles.

Workshop #31: TRENDS Assumptions: Reflecting the Economy's Fluctuations (for experienced TRENDS users)

Laura Reicks, RSM

Most congregations have implemented strategies to address the shifting economic environment, i.e. freezing salaries, cutting employees, limiting capital expenditures, or decreasing other expenses. Most portfolios have seen a drop in market value. This workshop will explore ways to incorporate these new assumptions into TRENDS; to reflect both short term and long term implications. More importantly, comparing new and prior year projections will help leaders and planners to understand the "before and after" impact of the market swing. We will discuss charts and graphs that you can create that will demonstrate these changes.

Workshop #32: Conference Evaluation through the Lens of Small Communities Treasurers and Leadership

Mary Rochelle Guertal, OSST

There are more than 600 small religious institutes in the United States. RCRI is seeking assistance from Conference attendees to help us serve them better and to reach out to other small groups. We would like to know if the pre-session for small communities improved their conference experience. This session will also provide time for the communities to help RCRI shape future local workshops and consultations that will continue to assist them with their ministry in the finance office. Finance office and leadership personnel are invited to attend.

Workshop #33: Interviewing Potential Employees (repeat of Workshop #11)

Mary Jo Moran

Workshop #34: Employment Law (continued)

Andrew Kopon, JD

SPEAKER BIOGRAPHIES

Susan R. Arvanitis, CPA is Province Controller for the Congregation of the Passion, Holy Cross Province, a men's institute based in Chicago. Prior to joining the Congregation in 2002, she worked in the Chicago office of Deloitte & Touche LLP as a Tax Senior Manager. She has ten years of experience in public accounting providing tax consulting and compliance services to a variety of nonprofit organizations, and graduated with highest honors from University of Illinois at Urbana-Champaign with a bachelor's degree in accounting and master's degree in taxation.

Janice Bader, CPPS has been the Executive Director of National Religious Retirement Office since November 2007. Prior to being named to this position, she served for seven years as Project Director of Retirement Services at NRRO, assisting numerous religious institutes with retirement planning. Janice is a member of the Sisters of the Most Precious Blood from O'Fallon, MO, and she held the roles of Treasurer General and as Secretary General for her community. Janice was a member of the NATRI Board and a CORT chairperson. She volunteered as a NATRI/NRRO consultant for more than 10 years before joining the NRRO staff. She also was part of the committee that developed the TRENDS program. Janice holds a masters degree in business administration from Southern Illinois University at Edwardsville.

Claire Blohm, MBA is currently the Chief Financial Officer for three religious communities in the San Francisco Bay Area: Sisters of Notre Dame de Namur, Sisters of St. Francis-Mount Alverno, and Sisters of the Presentation-San Francisco. She has served as Treasurer and/or CFO for religious communities since 1982. Claire also contributes her time as a member of several advisory boards for both active and contemplative communities in

California. She has been a NATRI and NRRO consultant since 1996; recently authored the NRRO publication "A Future Full of Hope: A Guide for Strategic Planning."

Christopher E. Cahill is a Principal of the Concord Advisory Group. Ltd. As one of the founders of the company, Mr. Cahill has been with Concord since 1988. Prior to Concord, Mr. Cahill worked for both Merrill Lynch and PaineWebber. Mr. Cahill earned a B.A. degree in Economics from Washington & Lee University in Lexington, VA. He is a lifelong resident of the Princeton, N.J. area.

Fiduciary Education Experience: While working as Senior Consultants at Concord, both Mr. Cahill and Mr. Santin have interacted with and advised Investment Committees for over twenty years. Fiduciary educational services are provided as part of Concord's ongoing retainer-based relationships and/or on a stand-alone basis. Concord organizes on-site or off-site workshops to concentrate on specific topics and to bolster Investment Committee members' investment oversight knowledge. Concord also provides education via published materials.

Simone Campbell, SSS, the executive director of NETWORK, A National Catholic Social Justice Lobby, lobbies on Capitol Hill on issues of immigration, Iraq and domestic safety net. In 2008 she traveled to Syria and Lebanon to view first hand the Iraqi refugee situation. She is a noted speaker on the intersection of faith, Catholic Social Teaching and politics. Prior to coming to NETWORK she worked in California state public policy, served as the leader of her international community the Sisters of Social Service, and was the founder and lead attorney for the Community Law Center in Oakland, CA. Simone holds a J.D. from the University of California at Davis and a B.A. from Mount St. Mary's College.

Phil Capps, CPA, is a partner in the Certified Public Accounting Firm of Kerber, Eck & Braeckel, LLP (KEB), with 12 years of experience working with religious congregations and a bachelor of science degree from Illinois College. He has provided religious community clients with auditing and review services, management consulting services, financial reporting guidance, merger/reconfiguration consulting and bookkeeping services. He has provided guidance to numerous clients in implementing the fair value measurement standards and disclosure requirements of FAS 157.

Ann Carville, OSF, Ph.D. is a member and past president of the Franciscan Sisters of Milvalle, PA. Ann holds a doctorate in human and organizational development with a concentration in development of systems. She is a veteran in the art and practice of planning having begun working in those areas in the mid 1960's. She has assisted numerous leadership teams and committees with planning and has facilitated many chapters and assemblies.

Ann has served in education, in administration, and as the Associate Director of CMSM. She currently is a volunteer consultant for the National Religious Retirement Office, working with religious institutes in NRRO's new Planning and Implementation Process.

Margaret Mary Cosgrove, BVM is a consultant serving various religious institutes. She served as treasurer of the Sisters of Charity of the Blessed Virgin Mary for 12 years. Sister Margaret Mary is a NRRO consultant as well as a RCRI Finance and TRENDS consultant. She holds a BA from Mundelein, a M.Ed. from LaVerne College and an MBA from the University of Iowa. She has both teaching and administrative experience in higher education. Margaret Mary has also served as a member of the Board of Directors of NATRI and RCRI and Clarke College as well as Loyola University in Chicago.

Patrick Croke has worked with the St Paul Province of the Sisters of St Joseph of Carondelet for the last twenty-one years as the Vice President-Administration. His responsibilities include those of Chief Financial Officer, Human Resources and Maintenance, among others. He serves on a number of committees and boards of directors for ministries of the CSJ's and other, predominately Catholic, organizations. A CPA, he has a bachelor in accounting and a MBA, both from the Badger State. He works regularly on employee issues such as developing position descriptions, determining salary ranges and employee benefit packages, employee evaluations and employee terminations. Pat and his wife, Louise who have five sons and seven grandchildren, are active members of St. Joseph Parish in Rosemount, Minnesota—just south of St Paul.

Catherine Cruickshank is a Senior Project Designer with Hoffman, a Total Project Management Company. She has 19 years experience designing educational and residential facilities, including several for Women Religious communities. Her involvement in sustainable design started four decades ago when she enrolled as an undergraduate in the Department of Architecture of Kwame Nkrumah University of Science & Technology (KNUST) in her native country of Ghana. Graduating with first class honors, she continued her studies in architecture at the University of Cambridge where her dissertation was on the relationship between architecture, culture and the environment. This topic remained a research interest during the next four years while she was a lecturer in architecture at KNUST, and motivated her to pursue a master's degree in anthropology at Syracuse University after she moved to the United States some thirty years ago. Married with three children, Catherine's unique background is reflected in her approach to the design of sustainable buildings.



Roger Duffield has spent 22 years working in the risk management and claims fields and has earned his Chartered Property Casualty Underwriter and Associate in Risk Management designations. He is currently the Director of Risk and Claims Services with Christian Brothers Services, where his role is to reduce the frequency and severity of claims facing the Christian Brothers Risk Pooling Trust. Roger has been with Christian Brothers Services for 13 years and prior to that has held the positions of claims specialist, branch claim manager and regional claim manager.

Anne Marie Gibbons is Section Director at the Center for Religious Immigration and Protection of CLINIC. Ms. Gibbons has practiced immigration law since 1989 when she represented detained asylum seekers in South Texas, and recruited and trained law students and lawyers from around the country to represent detainees asking for asylum. She later entered private practice where she worked on general immigration issues, as well as child abuse and neglect cases. Since 1998, she has managed CLINIC's projects dealing with antidiscrimination in the workplace, and legal representation of abused women under the Violence Against Women Act. Since 2000, she has worked for the Division of Religious Immigration Services, helping bring foreign-born priests, sisters, brothers and lay workers to work for the Church in the United States. Ms. Gibbons is a member of the District of Columbia Bar.

Sr. M. Rochelle Guertal, OSST is the Regional Delegate of the Sisters of the Most Blessed Trinity. She was a member of the Board of Directors of NATRI and now serves on the Board of the Resource Center for Religious Institutes. She belongs to an international community with a small presence in the United States. Sister Rochelle served as treasurer of her community. She was a teacher,

principal, and member of Leadership Council. All of this background comes together as she tries to help the community grow into the future and help RCRI better meet the needs of small communities.

Kathleen Hegenbart has been an advisor to Catholic organizations, non-profit institutions and individuals since beginning her career in 1983, with her current firm, Citi Smith Barney, where she is a Senior Vice President and Senior Institutional Consultant. For more than fifteen years her practice has focused primarily on addressing the financial challenges facing Catholic religious institutions and their related entities.

An alumna of Newton College of the Sacred Heart, Kathleen holds positions on the Board of Trustees of Lasell College, and of St. Joseph Hill Academy, Staten Island, New York. Kathleen is a past president of the National Association of Professional Investment Management Consultants and holds the designation of Certified Investment Management Consultant (CIMC). She has been a member of the Investment Advisory Board of the Roman Catholic Archdiocese of Boston for five years and currently serves on Cardinal Sean O'Malley's, 2010 Initiative for the restructuring of the diocesan school system.

Dominic Izzo, O.P. serves in his second term as Prior Provincial of the Dominican Province of St. Joseph, the Eastern province in the United States. Father Dominic served for seven years as vicar provincial or superior in the Vicariate in East Africa. Father Dominic also served as President of the Conference of Major Superiors of Men.

Lynn Jarrell, OSU, JCD is the President of the Ursuline Sisters of Louisville, KY. Prior to her election, she served as Associate Director for Canonical Affairs for the Legal Resource Center for Religious. For over twenty years, she has worked closely with the leadership of religious foundations in the role of consultant, presenter and teacher. Lynn also serves as a faculty member of the Institute of Law and Religious Life in Dallas, PA.

Kathleen Kalinowski, OSB has a Master of Science Degree in Economics from Marquette University and post graduate work at Georgetown University. After some years of teaching, she served in administrative positions over a period of twenty-two years as Assistant Academic Dean at the College of Saint Benedict, and as Vice President and Treasurer for her religious community. She has been a consultant for NATRI and NRRO since 1991. Currently, Kathleen chairs the St. Joseph City Planning Commission and serves on the Central Minnesota Mental Health Board. She particularly enjoys doing research and legal audits for religious institutes. Her most recent project was a two year study of the 150 year financial history of her monastery. Her current project focuses on two prioresses who served from 1961-1981 and how they guided her monastery during and after Vatican II.

Andrew Kopon, JD serves as national counsel for Christian Brothers Services and had worked as national and regional counsel for product manufacturers. His extensive trial work has been in a variety of matters, including wrongful death cases, product liability, insurance coverage, and employment law. Mr. Kopon's trial experience includes the defense of catastrophic injury, and wrongful death cases. His employment practice includes federal and state statutory and common law actions. He has served as a faculty on

prestigious national and state defense trial programs. He has tried high profile cases and has also argued before the Illinois Supreme Court on behalf of his clients. Mr. Kopon earned his B.A. degree from Providence College and his J.D. from The John Marshall Law School in Chicago, Illinois. He has been admitted to practice **District Court, Northeast District of Illinois**, Federal Trial Bar (1984), **New Jersey and U.S. District Court, District of New Jersey** (1982) and **U.S. District Court, Northern District of New Jersey** (1980).

Donna Lamberti is a certified public accountant who has worked as Controller of the Priests of Holy Cross. Prior to this role, she gained 12 years of experience with PricewaterhouseCoopers as a senior auditor. Her last few years at PwC were spent in non-profit auditing, including as auditors of Priests of Holy Cross. She has a deep appreciation of religious life both as an observer and as a former auditor and as a participant in the running of a religious order. She feels now more than ever before, that having enough resources to ensure proper compliance and oversight of institute assets, and good internal control should be a priority of every religious institute whenever possible.

In addition to finances, Donna was formerly in charge of human resources for the Priests of Holy Cross. She has been directly involved in the hiring of a Director of Technology, Director of Development, Director of Province Properties, Human Resources Manager and Administrator of the local religious infirmary.

Carolyn LaRocco, CFP, CIMA, is Managing Director at Morgan Keegan, Atlanta Consulting Group. She holds a B.S. in Finance from the University of Florida. Ms. LaRocco has more than 22 years experience in the investment field. She joined Morgan Keegan's Atlanta Consulting Group in 1997 and has been an Investment Consultant for ten years. Carolyn focuses on not for profit clients



assisting with all aspects of the investment management consulting process from the investment policy review/development, asset allocation, manager search and selection, SRI policy development and screening as well as on-going performance measurement and evaluation. She holds both the Certified Financial Planner (CFP) and Certified Investment Management Analyst (CIMA) designations and is a member of the Investment Management Consulting Association (IMCA) and the Financial Planning Association (FPA).

Sr. Georgette Lehmuth, OSF has been President/CEO of National Catholic Development Conference (NCDC) since 2001 and served as the administrator of the organization for one year prior to her permanent appointment. In 2007, Sr. Georgette was named for the second consecutive year by the Nonprofit Times as on one of the “Power and Influence Top 50” in the nonprofit sector. Previously, Sr. Georgette was elected to the Board of Directors of NCDC and served her religious community, the Franciscan Sisters of Our Lady of Perpetual Help, as Development Director, Director of Communications, Director of Justice and Peace, Director of On-Going Formation and as a member of the leadership team. She has served on numerous boards and committees for organizations such as NCDC, the Leadership Conference of Women Religious (LCWR), Religious Involved in Social Concerns, Planning Committee of Women Religious Collaborating,

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.

Clare Lorenzatti has been a Brenner, McDonagh and Tortolani partner since 1996. Clare joined BMT in 1992 after serving as Treasurer for the Sisters of Saint Joseph of Springfield, Massachusetts for nine years. Clare holds a Doctorate in Business Administration from Boston University. Clare was President of the National Association of Treasurers of Religious Institutes (NATRI) and has also served as Acting Executive Director of NATRI from 1992 to 1994 and was a NATRI/NRRO consultant. Clare has considerable experience in long-range planning and financial forecasting. In addition, Clare authored “The Role of the Treasurer” in the NATRI financial management and accounting manual.

Donna Markham OP, PhD is an Adrian Dominican and a licensed clinical psychologist. Prior to her election as Prioress of the Congregation, she served for 10 years as President of the Southdown Institute in Canada, a mental healthcare facility treating church professionals from across the English-speaking world. She is a Fellow of the American Board of Professional Psychology and the Academy of Clinical Psychology. Much of her energy has been directed toward the promotion of organizational change and effective leadership of clergy, religious and laity for a renewed church.

Her articles have appeared in journals such as *Human Development*, *Health Progress*, *Review for Religious*, *The Way*, *Sex and Gender Studies*, and *American Psychologist*. In addition, she is the author of the book, *Spiritlinking Leadership: Working through Resistance to Organizational Change*.

Pamela McClelland, CPA, CFE, is a partner in the Certified Public Accounting Firm of Kerber, Eck & Braeckel LLP (KEB), with 18 years experience working with religious congregations and their related ministries. She is a certified public accountant and a certified fraud examiner. Pam holds a B.A. and M.A. from the University of Illinois at Springfield. She has assisted congregations with audit and review services, management consulting services, financial reporting guidance, reconfiguration consulting and other accounting services. Pam has provided guidance to various clients related to the topics to be presented (FASB 157, FASB 158 and FAS 117-1). She has also taught auditing courses at the University of Illinois at Springfield and served on various not for profit boards and is a member of the task force for the Not for Profit Conference for the IL CPA Society.

Brother Bob Metzger, SM is Associate Director for Planning and Education at the National Religious Retirement Office (NRRO). Brother Bob is a member of the Society of Mary (Marianists), Province of the United States. He is a Certified Public Accountant (retired) in the State of Ohio. He has served his community as Assistant Treasurer and Treasurer and was a member of his Provincial Council before the merger of four Marianist provinces in 2002. He was chair of the Treasurers' committee that oversaw the financial, accounting and legal portions of the merger. He has also served as the Director of Finance in the new province. He has volunteered as a consultant for NRRO and NATRI since 1987.

Daniel J. Misleh is Executive Director of the Catholic Coalition on Climate Change. Since 1982, Dan Misleh has been involved in the social mission of the Church beginning with two years in the Jesuit Volunteer Corps in Alaska through today. Prior to founding the Coalition, he assisted the public policy arm of the United States Conference of Catholic Bishops as

the Director of Diocesan Relations for the Department of Social Development and World Peace (now Justice, Peace and Human Development). He has trained Catholic leaders around the country in the principles of Catholic social teaching, parish social ministry, community organizing, and the Catholic approach to issues such as agriculture, environment, criminal justice and the death penalty. As Executive Director of the Catholic Coalition on Climate Change—which includes 12 national Catholic organizations including the U.S. Conference of Catholic—he has engaged the Catholic community at the national, state and diocesan levels in a serious and sustained conversation about a Catholic approach to climate change focusing on the promotion of the common good, the protection of poor people and the exercise of prudence and to more fully implement the U.S. Catholic bishops' 2001 statement on climate change.

Mary Jo Moran, PhD, SPHR is Executive Director of the National Association of Church Personnel Administrators (NACPA). Prior to 2005 when Mary Jo assumed the position of NACPA's Executive Director, 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. In addition to her clients in the United States, she has worked internationally in Singapore, Budapest, Dublin, South Africa and throughout Mexico and Canada. Her areas of expertise include:

- Executive and team effectiveness coaching
- Leadership and team development
- Organizational diagnosis
- Change management
- Conflict management

Mary Jo has held a variety of management positions in different industries including the position of director of human resources.



Pamela Daniel Mott, MBA has served as Chief Human Resources Officer, Christian Brothers Services, since 2003. She was Former Associate Vice President for Human Resources and adjunct instructor in College of Business at Lewis University (A LaSallian, Catholic University) She is also, Chairperson, Board of Directors, Easter Seals Joliet Region, Illinois.

Constance Neeson, LSW is Coordinator of Consulting Services, Benefit Eligibility Management for Religious for Brenner, McDonagh & Tortolani, INC. She 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 gained her knowledge of government programs through serving for 8½ years as a Medicaid caseworker with the state of Indiana.

The 2008 revision of her “Government Programs Resource” is available on the LRCR Website under Programs. Constance has been a featured speaker at the past seven national conferences for the National Association for Treasurers of Religious Institutes (NATRI). She has spoken on topics such as Government Programs, managing databases, and the latest changes in Medicare. Constance also monitors the RCRI ListServ and provides help with eligibility issues.

Sue Novak, CPA, is a partner in the Not-for-Profit Services Group of the Michigan-based accounting firm Plante & Moran, PLLC. Sue has more than 20 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 religious congregations throughout the United States and internationally on financial statement audits, analyses of

congregation resources, planning and operations. Sue has had responsibility for the development of Plante & Moran’s standard audit programs for not-for-profit organizations. She has presented on technical accounting issues at national, state, and firm not-for profit education seminars.

Sue received her Bachelor of Science in Accounting from Oakland University and is also a graduate of Leadership Oakland IX. In addition to her corporate responsibilities, Novak is a technical reviewer for not-for-profit accounting and auditing textbook published by Harcourt Brace.

Eileen O’Connell joined Christian Brothers Investment Services in 2004 as an Investment Advisor. She is responsible for developing and retaining participant relationships in the Eastern region. 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, a Certified Investment Management Analyst (CIMA) designation, and Series 7 and 63 FINRA registrations.

Mark O’Donnell, CIMA, is a Consulting Services Group Specialist for the Central Division of Global Wealth Management. He focuses on assisting Financial Advisors, Individual and Institutional clients in formulating Investment Policy, Manager Selection, Portfolio Construction and Performance Review. Mark has a twelve year background in investment consulting, territory management and lending with Morgan Stanley, Van Kampen Investments and The Jackson State Bank. Mark graduated with a Bachelor of Science Degree in Finance from the University of Dayton (1993). He holds NASD Licenses: Series 7, 63, 65 and has been awarded the Certified Investment Manage-

ment Analyst, CIMA® designation by the Wharton School and the Investment Management Consultants Association, IMCA as well as the title of Chartered Mutual Fund Counselor from the College of Financial Planning.

Laura Reicks, RSM, MBA, is the Treasurer of the Sisters of Charity, BVM of Dubuque, Iowa. From 1999 through 2006, she served as the Executive Director of NATRI. Laura was instrumental in the development of TRENDS and the training and consultation services that facilitate its usage. She remains an active TRENDS Trainer and consultant.

Scott Santin is a Principal of the Concord Advisory Group, Ltd. As one of the founders of the company, he has been with Concord since 1988. Prior to founding Concord, Mr. Santin worked for Merrill Lynch, PaineWebber and Hamilton & Co. Mr. Santin earned a B.S. degree in Finance from Rider College in Lawrenceville, N.J. and a MBA degree from Rutgers University in Newark, N.J. He has been a lifelong resident of the Princeton, N.J. area.

Fiduciary Education Experience: While working as Senior Consultants at Concord, both Mr. Cahill and Mr. Santin have interacted with and advised Investment Committees for over twenty years. Fiduciary educational services are provided as part of Concord's ongoing retainer-based relationships and/or on a stand-alone basis. Concord organizes on-site or off-site workshops to concentrate on specific topics and to bolster Investment Committee members' investment oversight knowledge. Concord also provides education via published materials.

Donna Sauer, JD, JCL has been the Associate Director for Civil Law at the Legal Resource Center for Religious since May 1, 2006. Donna received her BS in Education from Brescia College in Owensboro, Kentucky. She then taught in Catholic elementary

schools for eight years before earning her law degree from the Catholic University of America in 1995. After practicing law four years in a civil law firm and two years as a criminal prosecutor, Donna earned her canon law degree from St. Paul University in Ottawa. For two years she 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 LRCR, Donna has researched and addressed numerous issues of interest to members of religious institutes and societies of apostolic life, including various aspects of public benefits, taxes, powers of attorney, and policy reviews.

John Simmons is Executive Director of North American Distribution for Morgan Stanley Alternative Investment Partners. He joined Morgan Stanley AIP in 2003 and has 21 years of industry experience. Prior to his current role, John was an investment representative for Morgan Stanley's Private Wealth Management. John received a B.S. in electrical engineering from the Georgia Institute of Technology.

Neal Smith, CPA, has been employed by Benedictine Women of Madison for the past 23 years and currently serves as executive director, administration. Prior to joining the sisters, Smith was the executive vice president of a regional real estate development and construction firm. Before that he was general manager of a single family home builder and worked in a CPA firm. He is a consultant for the National Religious Retirement Office and Resource Center for Religious Institutes, and a consultant to the finance committee of the Federation of St. Gertrude, an organization of 16 monasteries in the U.S. and Canada. He is a past president of the Wisconsin Treasurers of Religious Institutes. Mr. Smith has been published in *Taxation for Accountants, Financial Management and Accounting Manual for Religious Institutes* and *The Use of Real*



Estate by Religious Institutes. Mr. Smith is a graduate of University of Wisconsin-Madison with a Bachelor of Business Administration degree.

tion consulting and other accounting services. Additionally, Kate has assisted clients with the implementation of FASB 157 and FASB 158.

Sister Mary David Walgenbach, OSB joined the Sisters of Saint Benedict following a call to religious life that grew steadily after high school graduation. Early on she took an active part in the community life and ecumenical ministries. She co-founded the Community of Benedict and the monastery's oblate community, setting a path toward the dream of an ecumenical Sisters' community that became reality in 2006. Sister Mary David has a lifetime involvement in interreligious gatherings, including the Bossey Ecumenical Institute of the World Council of Churches in Geneva, Switzerland and the World Council of Churches "Ecumenical Decade of the Churches' Solidarity with Women" in Harare, Zimbabwe. She is currently prioress, guided daily by the desire to make the monastery an inclusive place for people of all faith traditions.

Sister Mary Waskowiak, RSM is President of the Institute of the Sisters of Mercy of the Americas. Mary served in the Presidency of the Leadership Conference of Women Religious (LCWR) from 1996 to 1999. Her prior ministry experiences include secondary education, parish ministry, seminary field education, vocation/formation ministry, and spirituality.

Mary has served as facilitator and/or presenter for women and men religious in Argentina, Chile, England, Guyana, Ireland, Peru, South Africa, the United States and Zambia.

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 (OSB).

Keith Zekind is the Director of Finance for the Congregation of the Passion, Holy Cross Province, based in northwest Chicago. Keith is a member of RCRI's Board, the Pension Board of Christian Brothers, NRVC's Finance Advisory Committee and NDCD's Accountability Task Force. Keith also is Treasurer of Pathways to Hope, a CMSM Region 5 sponsored organization that provides outreach to victims/survivors of sexual misconduct. He also is active with his Province boards, including the Lay Advisory Board, Investment Advisory Board, Stewardship, Revisioning, Asset Repositioning and Strategic Planning Committees. After receiving his Bachelor's in Accountancy from Western Michigan University in Kalamazoo, Keith headed to Chicago, where he has been for the past 22 years. He began his career with a Big Eight public accounting firm and later became Assistant Controller of a billing office for a large Catholic hospital.

Kathleen Ward, CPA, is a senior manager in the Certified Public Accounting Firm of Kerber, Eck & Braeckel LLP (KEB), with 10 years of experience working with religious congregations and their related ministries. Kate has a bachelor of science degree from Purdue University. She has provided congregations with audit and review services, financial reporting guidance, merger/reconfigura-

Please fill out a separate Registration Form for each participant and each guest. Photocopies are accepted. Registration deadline is **September 11, 2009**. Forms are also available at www.trcri.org under **Programs**.

	Before 8/28	After 8/28*
RCRI Member Religious Institute**	\$425	\$450
Member discounted registration if rooming at the Hilton Atlanta Georgia***	\$375	\$400
Non-RCRI Member Religious Institute	\$750	\$775

*Although registrations are accepted through September 11, registration fees increase after August 28.

**Applies to all RCRI member institute staff—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 in the Hilton Atlanta Georgia.

Return conference registration forms to:

RCRI at 8824 Cameron Street, Silver Spring, MD 20910.

CANCELLATION POLICY

- For written cancellations before September 11, RCRI will refund the registration fee, less a \$50 processing fee.
- Fifty percent (50%) of the registration fee will be refunded for cancellations made on or after September 12th.
- On or after October 1st, no refund will be made.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by registered attendee, naming his/her substitute.

POLICY FOR GUESTS

Guests will be welcomed to all food functions for which they are registered. They will be allowed in the Exhibit Hall if they are properly identified with a name badge. Guests will not be allowed to attend workshops. There is a \$100 charge for guests who will be attending the hospitality events.

CONFERENCE SITE AND ACCOMMODATIONS

The 2009 RCRI National Conference will be held at the Hilton Atlanta Georgia, located at 255 Courtland Street, N.E., Atlanta Georgia 30303. Lodging is available at the Hilton Atlanta and the Sheraton Atlanta, the meeting events will take place at the Hilton. All reservations must be made through the online reservation system. The hotel rate of \$150 for single and double occupancy rooms is available over the conference dates, based on hotel availability the rate will be offered for the three days prior to and following the conference. **To ensure the specified rate, hotel reservations must be made by September 22, 2009.** This year, hotel accommodations will be made through Nix & Associates. A link to make your reservations is on the RCRI website, www.trcri.org under **Programs**. Please have your credit card information available, as you will be required to provide it to make your reservation. When sharing a room, please

register each individual by name on the registration form to be assured of the discounted RCRI registration fee. Persons with disabilities or persons with special needs should clearly identify on the hotel reservation form if any special accommodations are required. All the information on the reservation form is being transmitted on a secure website. This feature was added to protect your identity and information. If you do not have access to the internet, and need a paper copy, please contact the RCRI office. All guests with confirmed reservations will be accommodated. All meeting areas are accessible by elevator and escalator.

Hotel Reservation forms completed on the RCRI website are automatically e-mailed to Nix & Associates when you click the 'Submit' button. For other inquiries contact Nix at registrar@nixassoc.com or phone: **314-645-1455 or 1-800-266-0866**. Please note that direct reservations to the hotel will not be awarded at the RCRI discount rate.

HOTEL NOTES

The Hilton Atlanta has an extensive fitness and recreation center as well as an indoor, outdoor pool and sauna. Each guest room has available wireless internet for \$9.95/per day fee. *Subject to change.*

AIRPORT & TRANSPORTATION

The Hilton Atlanta is accessible from the William B. Hartsfield/Atlanta International (ATL). Shared-ride shuttle services are provided by The Atlanta Link. They are available at Hartsfield-Jackson Atlanta International Airport during flight operating hours. These shuttles provide transportation service to the Hilton Atlanta hotel. Local Shared-Ride shuttles run approximately 15 to 30 minutes apart.

Most shared-ride shuttles pick up and drop off on the Green Bus Aisle, which is located outside in the Ground Transportation Center between the North and South Terminals. We recommend that you contact the company directly to make reservations or for inquiries. Reservations: **404-564-0607 or 404-524-3400**. Website: www.theatlantalink.com. The cost is \$16.50 and roundtrip is \$29.

TAXI CAB INFORMATION

A set fee prevails between the airport and the central business district. A special per-person rate applies for two or more passengers.

Taxicab service is located in the Red Bus aisle. The fare is approximately \$32 with a \$2 charge for each additional person. Call **404-762-6087** if you need more information.

Parking is available at the Hotel at a rate of \$28 per day for valet parking. Overnight self parking is \$21 per day with no in or out privileges. *Fees subject to change.*

PUBLIC TRANSPORTATION

From the Airport by the Subway (MARTA):

Take the train north and exit at Peachtree Center Station. Take the Harris Street escalator or follow the directions for Peachtree Center Mall. You will go up a very steep escalator into the Mall. Take the walkway from the Mall to the parking garage & Peachtree Center Athletic Club. Take the elevator to the street. The hotel is on your right when you exit the garage.



CONTINUING EDUCATION UNITS (CEUs, CPEs & CLEs)

The American Council on Education has put new procedures into effect that require us to be certified through IACET (International Association for Continuing Education & Training). Our merger means that we will have to re-certify and we have been unable to do yet. We look forward to providing CEU credits in 2010 to all who need them at that time. We apologize for the inconvenience this may cause.

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 additional information, please contact Sabrina at RCRI at shidalgo@trcri.org or 301-587-7776.

For those who require CLE credits, there is a \$75 fee. On your registration form, please include your State and License number. We are seeking CLE credits for the following events: workshop numbers 1, 5, 10, 11, 12, 27, 29, 30, 33 and 34. As well as the Major Address on Future Ecclesial Relationships given on Thursday October 22nd. If you have questions, contact Sabrina Hidalgo, shidalgo@trcri.org or 301-589-8143.

CONFERENCE NOTES

Review the CONFERENCE Registration Book and select the workshops and hospitality events you plan to attend. Your selection at this time will assist RCRI in providing adequate room assignments and meal guarantees. Food functions listed on the registration form are included in the registration fee. **Hotel room, travel, and other personal expenses are not included in this registration fee.** Continental breakfasts are available on Wednesday and Thursday at the Exhibit Hall. On Friday morning; we will provide a hot buffet style, sit down breakfast in the ballroom. If you do not indicate attendance at the food functions on your registration form, you will not be included in the guaranteed count to the food service. However, if you do sign up to attend the food functions; please plan on doing so, as RCRI incurs the expense regardless of your attendance. Note that the Wednesday noon luncheon will provide an opportunity for CORTs to meet with others from their region. **RCRI is particularly concerned about accurate meal counts for the Closing Event to enable us to be cost effective yet prepared for all attendees.**

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 and Major Addresses as well. To order copies after the conference, please call GEM TAPES at 806-797-9608.

TOURS

Tours will not be available this year.

INFORMATION ON OTHER LEISURE TIME OPPORTUNITIES

Downtown Atlanta has much to offer. Within walking distance or a short taxi ride to many of the city's leading **tourist attractions** and destinations including:

Georgia World Congress Center

Georgia Aquarium

CNN Center

Centennial Olympic Park

Philips Arena, home of the Atlanta Hawks

World of Coke

The Mall at Peachtree Center

Martin Luther King Center

Turner Field, home of the Atlanta Braves

Fox Theatre

Nearby restaurants, fine dining, theater

Close to other notable attractions including:

Georgia Dome, home of the Atlanta Falcons

Atlanta Civic Center

Georgia State University

Georgia Tech

For more information, please go to www.atlanta.net. There you will find more information about Atlanta and leisure activities.

EXHIBITOR INFORMATION

EVENT SPONSORSHIP

Please contact Sabrina Hidalgo, shidalgo@trcri.org or 301-587-7776 for more information. Sponsorship information will be posted on our website along with other exhibitor information.

EXHIBIT INFORMATION

Please 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 September 11, 2009.

See exhibitor materials for booth fees, registration forms, sponsorship opportunities and cancellation policy.



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