

Retirement Fund for Religious

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News

Letting Go and Carrying On: A Community Steps into a Bold New Future

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For the Ursuline Sisters of Cleveland, 2019 loomed as the year they would run out of retirement savings. Instead, through exhaustive planning, hard work, sacrifice, and—above all—faith, it became the year they moved into a new congregational home. Now adequately funded for retirement per the National Religious Retirement Office (NRRO) guidelines, they have begun a new chapter in the life of their community.

A Troubling Forecast

In 2006, a Tracking Revenue Expense Net Assets Demographics Savings (TRENDS) analysis projected that, by 2019, both the Ursulines' investment portfolio would be exhausted and they would still have a significant number of retired and active members. In the years that followed, the Ursulines worked to address their retirement-funding issues while continuing to provide assisted living and skilled care in their own facility, St. Angela Center. Although the 44-bed center operated under a special license for vowed religious, the congregation was still spending \$1 million annually to operate it.

Through comprehensive planning, the Ursulines addressed their unfunded liability and built a smaller, elder-friendly residence. The process involved ongoing collaboration among leadership, the eldercare team, and the finance office.
From left: Sister Kathleen Flanagan, RN, Leadership Team; Sister Joan Peine, Treasurer/Chief Financial Officer; Mr. Bob Bazzarelli, Director of Finance; and Sister Susan Durkin, President.



Letting Go and Carrying On, continued

The Ursulines entered the NRRO's Planning and Implementation Assistance program in January 2012. Their aim was to reduce their unfunded retirement liability and ensure continued quality care for elder members. They envisioned a solution that would furnish a continuum of care on their own 43-acre campus, yet they were open to all possibilities.

Later in 2012, an NRRO planning grant enabled the Ursulines to engage professionals who helped them evaluate a range of care options. The analysis revealed the long-term cost of operating St. Angela Center and its impact on the community's overall viability. On December 15, 2012, the Ursulines made the extraordinarily difficult decision to close the center. "At that meeting," says Sister Susan Durkin, the community's president, "our oldest and most vulnerable members stood up and willingly made the greatest sacrifice for our future. Without the information we gained from the planning grant, I don't think we would have ever been able to let go [of St. Angela Center]."

The substantial savings realized from closing the center helped the Ursulines to chip away at their unfunded liability. Today, the community relies on nearby Regina Health Center for skilled care and assisted living, and 20 sisters reside there. An additional seven sisters are in assisted living at Light of Hearts Villa. Both facilities were founded by communities of women religious and now operate under the Sisters of Charity Health System. At these locations, the Ursulines know their members are being supported in their lives as religious.

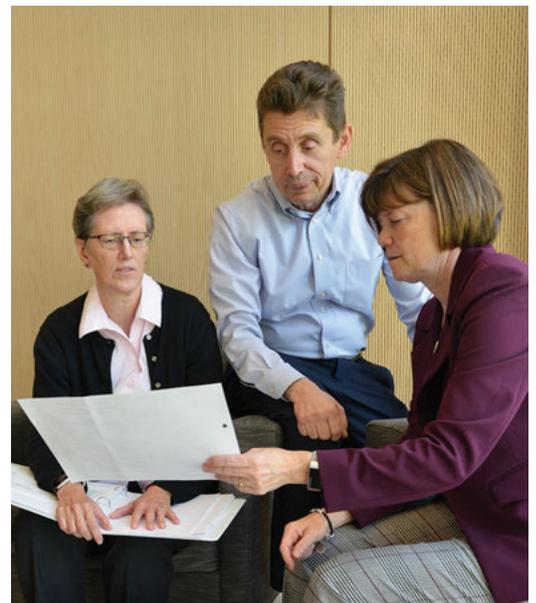
The Future Imagined

With care plans in place, the community's next challenge was to create space for elders who could live independently. Nearly 60 years old, their 250,000-square-foot motherhouse was then home to roughly 70 sisters. It featured tiny bedrooms, communal bathrooms, and long hallways. The equivalent of a football field separated the living quarters from the dining room. In addition, the building needed an estimated \$8–\$10 million in known repairs.



"The former motherhouse is across the road, and the [senior] sisters will have to watch it come down. There's still a lot of emotion that's going to come out."

Sister Joan Marie Russ, Member of the Ursulines' NRRO planning team.



Legal, municipal, and zoning concerns had to be addressed as part of the construction process. From left: Sister Joanne Gross, Leadership Team; Bob Bazzarelli; and Sister Susan Durkin.

Letting Go and Carrying On, continued

The community recognized the need to extensively renovate their existing structure or build a smaller, elder-friendly facility. Either way, a capital campaign would be required to underwrite some of the costs. A second NRRO planning grant in 2014 enabled the Ursulines to assess their campaign readiness by conducting audits of the development and finance offices.

By 2016, the Ursulines had developed a three-part strategy to address long-term senior housing and the best use of their motherhouse campus. The plan included (1) construction of a new, significantly smaller, elder-friendly residence for senior members who could

live independently; (2) preservation of a portion of the motherhouse property for a public green space; and (3) sale of the remaining motherhouse property for development that was in keeping with the Ursuline mission and would be a fitting “neighbor” to the adjacent Ursuline College, which the community founded in 1871.

Merging Old and New

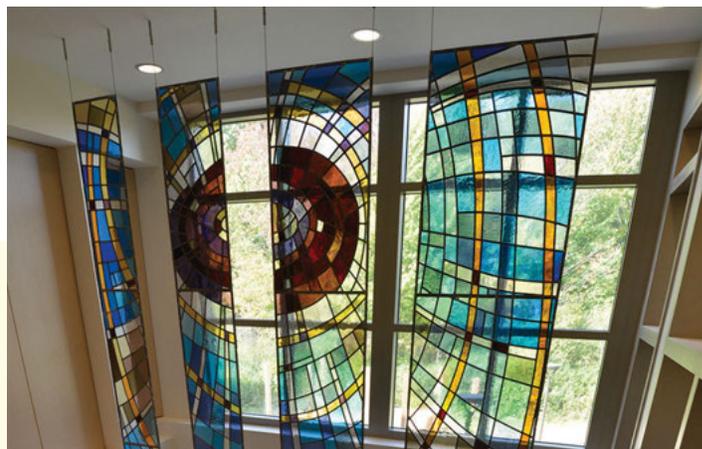
Participation in the NRRO Planning and Implementation Assistance process enabled the Ursulines to make sweeping decisions regarding congregational housing, finances, and health care. Several strategies helped them transition to a new phase of community life.

Communicate Often and Regularly

Beginning in 2013, the Ursulines held monthly meetings to keep members informed of the progress of and setbacks to their health-care and property initiatives. Small group and one-on-one discussions were also available for members who wanted more detailed information or had specific questions.

Ritualize Good-Byes and Hellos

The community created occasions for the sisters and their supporters to say good-bye to the motherhouse. For example, sisters’ family members were invited to visit one last time before the congregation vacated the building. On the feast of St. Angela Merici, the community’s foundress, the Ursulines held a special prayer ceremony and processed to areas within the motherhouse that were especially meaningful. Afterward, each sister wrote on paper one thing she could let go of in the motherhouse and one hope for the future. The sisters dropped the slips of paper for letting go into water, where they dissolved. Their hopes were gathered and carried to their new congregational home.



Stained glass from the motherhouse chapel was repurposed for Merici Crossings.

Incorporate History

Reminders of the community’s history can be found throughout the new building. In common areas and beside each suite, glass cases artfully display heritage pieces and other items meaningful to the congregation. Stained glass panels, made from the windows of the motherhouse chapel, hang in the entryway and rear atrium.

Prepare for Ongoing Transition

Transition doesn’t begin or end on move-in day. Prior to moving, senior sisters were consulted on numerous decisions regarding their new space. For example, one group offered input on paint colors; another selected furnishings. At Merici Crossings, sisters continue to play an active role in shaping daily life through service on various committees.

Letting Go and Carrying On, continued

A Village of Help

An NRRO Implementation Assistance award of \$500,000 helped the Ursulines underwrite such necessary expenses as architectural services and project management for the planned building. From there, they were off and running. In the years leading up to construction and the launch of their capital campaign, the Ursulines had restructured their advisory board to include six committees. Up to 40 lay professionals—experts in everything from finance to construction management—served alongside sisters to complete specific objectives related to the Ursulines' plan.



Adorned by floor-to-ceiling windows, the chapel is the centerpiece of Merici Crossings. *Back row, from left:* Sisters Anne Cecile Muldoon and Ursula Marie George. *Front row, from left:* Sisters Ann Whitely, Donna Kristoff, Marie Cecile Bauers, and Joan Petersen.

Central to the community's ability to move forward with a new building was their Bold Faith—Building a Future Campaign. As part of their planning work, the Ursulines had intensified development and communication efforts. Donors thus understood their goals and responded generously. Led by Capital Campaign Director Sister Ritamary Welsh, the campaign has raised \$9.5 million to date, surpassing its original \$8 million goal.

Merici Crossings

The Ursulines moved into their new facility in spring 2019. Named Merici Crossings in honor of the community's foundress, St. Angela Merici, the building is home to 68 sisters, most of whom are retired. A fraction of the motherhouse's size, the new residence is easier for senior sisters to navigate and much less costly to operate. An environmentally friendly design reflects the Ursulines' commitment to care of the earth and includes such features as LED lighting and a modified geothermal heating and cooling system.



Sister Ritamary Welsh



The new wellness center offers exercise classes and equipment as well as space for physical therapy. *Above:* Sister Kathleen Foster.

Letting Go and Carrying On, continued

Each day at Merici Crossing begins with Mass in the light-filled, east-facing chapel. Adjacent to the chapel are a gathering space and community dining room. The facility consists of primarily two-bedroom suites plus a few one- and three-bedroom options. Suites include a kitchenette, living area, accessible bathroom, and a private bedroom for each sister.

All sisters residing at Merici Crossings must be able to live independently. Meals are provided in the community dining room, but residents are responsible for their

own laundry and housekeeping. A wellness area offers exercise equipment and space for physical therapy, or sisters can take a group class. An on-site nurse/wellness coordinator serves both residents and the rest of the Ursuline community. "We want our sisters to be able to live independently for as long as possible, and that means a commitment to wellness," says Sister Susan.

Wellness also includes enabling sisters to continue in ministry as they are able. The building offers designated spaces for seniors who serve as spiritual directors or volunteer as tutors. Other elders serve in hospitality ministry as receptionists, and all participate in the lifelong ministry of prayer.



Suites at Merici Crossings feature accessible bathrooms, private bedrooms, kitchenettes, and shared living space. *Above and seated left:* Sister M. Praxedes Wakefield. *Standing, from left:* Sisters Francis Borgia Allwine and Therese Horan.

Letting Go and Carrying On, continued

An Exit Strategy

Although currently at capacity, Merici Crossings will one day offer suitable senior-living space for laypersons or religious from other congregations. With future residents in mind, nearly every inch of the new building was designed with an eye toward how the space could be adapted when the sisters no longer need it. For example, kitchenettes can be easily converted to full kitchens, and suites include such conveniences as washers and dryers. “Some of the amenities are more than what we would choose, but it was less expensive to include them now than to add them later,” explains Sister Susan.

The Road Ahead

With the new congregational home operational, the Ursulines are tackling the remaining elements of their long-range plan, including sale of most of their property. Discussions are underway with a developer who would like to build a 55-and-over lifelong learning community and with a Cleveland-area nonprofit that is seeking to create housing for adults with special needs. Once these negotiations are complete, the Ursulines will work with the local government to create a public green space. Through these partnerships, the congregation is striving to transform their property into a spiritually and educationally based, intergenerational campus. And with plans complete, the sisters will be free to continue ministering in the Cleveland area as they have since 1850.

Merici Crossings includes dedicated space for senior sisters to continue in ministry, including tutoring and spiritual direction. *From left:* Sisters Mary Jane Jones and Carol Pelegrin.



Education and Outreach Manager



In October, Sister Georgette Lehmuth, a member of the Franciscan Sisters of Our Lady of Perpetual Help of St. Louis, Missouri, joined the National Religious Retirement Office (NRRO) team as Education and Outreach Manager. She will focus on the NRRO’s educational resources and the development of programming to assist religious institutes with long-range retirement planning. She also will liaise with other organizations that support religious life.

Sister Georgette most recently served as President and CEO of the National Catholic Development Conference. Previously, she ministered as an educator at both the secondary and college levels. She also served in congregational leadership for 10 years. A frequent presenter at national and international conferences, she has authored numerous articles on mission viability.

Welcome Sister Georgette!



Message from the Executive Director

Most of us would agree with the old adage that change is the one constant in life. We can accept change or fight it. The Ursulines Sisters of Cleveland, who are featured in this newsletter, came to understand that embracing change was the only way to sustain their community. So, they made the monumental decision to vacate their motherhouse and imagine a new future.

In situations such as the Ursulines'—where change involves trading the known for the unknown—it can be tempting to dwell on what is lost. It takes a conscious effort to instead celebrate what remains: mission, charism, history. Change does not mean leaving these things behind but rather learning new ways to express them. Mission can be a wonderful starting point for this process because it is the tangible embodiment of a community's deeply held values and traditions. Focusing on mission enables a community to zero in on what is most important and to guide change in ways that uphold these priorities.

Like my own community, the Ursulines are educators, and any solution they envisioned for their motherhouse campus had to reflect this central aspect of their congregational identity. With mission in mind, they sought to ensure that the future uses of their property

would embody their commitment to lifelong learning and to serving the vulnerable. Their new vision is for a motherhouse campus that fosters dialogue between old and young and that provides a welcoming, safe space for adults with special needs. The expression is different, but the mission is the same.



Effective change is not easy. The pain and loss are real, and there must time and space for healing. Even with mission as our guide, we may continue to feel off kilter as we learn new ways of living and ministering. After all, we are navigating in uncharted territory—as did those who came before us and those who will come after. The one constant in life is change.

God bless,

Sister Stephanie Still, PBVM

Retirement Fund for Religious National Collection

December 7-8, 2019



The annual collection underwrites all the financial assistance, services, and educational resources that the NRRO provides. Please give it your vocal and prayerful support! Download resources, including text and images to share on social media, at retiredreligious.org/materials.

NRRO Calendar

January

- 2** Direct Care Assistance applications mailed
- 15** NRRO Assistance Review Committee meeting
- 19-23** Informational meetings on Planning and Implementation Assistance
San Antonio, TX
- 23** NRRO Management Committee meeting

February

- 12** NRRO Webinar, Topic TBD
- 24-27** NRRO workshop: *Accompanying a Person Through the Dying Experience*
Marriottsville, MD



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Stay Connected

Please send changes in address, phone, email, or congregational leadership to the NRRO, c/o Karen Cañas (kcanas@usccb.org), so that we may keep our records and mailing lists updated.

The National Religious Retirement Office coordinates the national collection for the Retirement Fund for Religious and distributes these funds to eligible religious institutes for their retirement needs. Our mission is to support, educate, and assist religious institutes in the United States to embrace their current retirement realities and to plan for the future.

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