

Finance & Stewardship

Five-year fund drive nears \$55 million mark

By Mike Latona
Staff writer

Mark Seeberg freely acknowledges that the Miracle of Sharing Campaign has set challenging financial objectives.

"We're trying to raise an extraordinary amount of money for this diocese," stated Seeberg, the diocesan director of development.

So perhaps the fund drive's title is appropriate since it seeks to raise a rather miraculous sum of \$80 million. Yet at the campaign's two-thirds point, the Miracle of Sharing happens to be well on its way to achieving its goals.

Through last week, Seeberg said, nearly \$55 million has been committed — through gifts of cash, securities, property, life insurance, bequests and life payment plans — as the Miracle of Sharing enters the final 20 months of its five-year span.

In the late 1980s, the diocese opted to launch a fund drive through a development program to meet several long-term financial goals. A consulting firm, Gonser, Gerber Tinker and Stuhr of Chicago, was then retained to perform a feasibility study on how much money the diocese was capable of raising through this effort.

Based on the firm's recommendations, the campaign was begun July 1, 1992, with target-

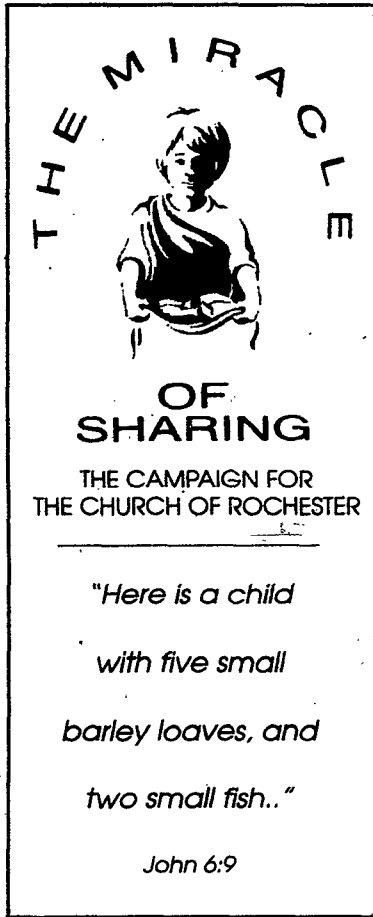
ed dollar amounts for five specific areas, including:

- **Catholic elementary-school education, \$20 million.** This fund seeks to extend financial assistance for families wishing to send their children to Catholic schools. Seeberg noted that schools located in the city of Rochester stand to benefit the most from this fund, since the feasibility study indicated donors are more likely to support low-income families.

- **Retirement fund for women religious, \$25 million.** These monies are to help cover living expenses of women religious *already retired* who did not receive sufficient retirement benefits during their years of service. The fund represents approximately one-third of the total expense not already covered through individual contributions, portfolio earnings, Social Security and asset management. Sixty percent is earmarked for the Sisters of St. Joseph of Rochester; 20 percent for the Sisters of Mercy; and the balance for 20 other congregations of women religious who have served the diocese.

Seeberg explained that adequate retirement benefits for these congregations have only existed since the mid-1980s, and that future retirees will be covered through these packages.

- **Support and development of lay ministry, \$5 million.**



Sixty percent of this fund will help cover salaries and educational expenses for lay employees at diocesan parishes. The balance will go toward a financial-aid fund for St. Bernard's Institute in Rochester, which serves as the diocesan school for theology and ministry.

- **Enhancement of current programs in faith develop-**

ment, parish services and social ministries. Donations for this category are derived through the Thanks Giving Appeal. The annual parish fund drive has set a goal of \$23 million for the five-year period covered by the Miracle of Sharing.

Also factored into this total is \$7 million earmarked to support "restricted areas" — related causes not included in the campaign's main goals, such as funds for seminarians and priests' retirement.

According to Seeberg, the following totals had been raised as of Oct. 20: \$30.3 million for Catholic schools; \$12.8 million from the Thanks Giving Appeal; \$6.2 million for restricted areas; \$1.7 million for women religious; and \$270,000 for lay ministry.

An additional \$3.4 has been committed to the bishop's discretionary fund. These monies, Seeberg explained, can be applied toward any area of the Miracle of Sharing campaign which falls short of its goal.

On the other hand, even when a specific Miracle of Sharing goal has been met or exceeded, any surplus amount cannot be transferred. This scenario has already been realized in the Catholic education fund due to Robert and Peggy Wegman's announcement in late August that they were donating \$25 million to estab-

lish the Wegmans Inner City (WIN) Voucher Program.

"We are morally and legally obligated to honor the donor," Seeberg said.

With the exception of the Thanks Giving Appeal, Miracle of Sharing campaign officials have concentrated their efforts thus far on about 500 potential donors who have the financial resources to make sizable donations. Seeberg said if a public appeal is made, it will not occur until the final months of the campaign.

With 40 of the Miracle of Sharing's 60 months nearly completed, Seeberg said the donors' generosity has been exceptional.

"I'm very pleased, and I would have told you that even if we hadn't gotten the Wegmans' gift," Seeberg remarked.

Sister Ann Miller, RSM, president of the Sisters of Mercy of Rochester, is equally happy that some important needs for the retired women religious of her order can be met through the Miracle of Sharing.

"We feel very grateful for the campaign," Sister Miller said. "It is certainly something that is needed."

"This fund drive was like an answer to a prayer for us," added Sister Rosemary St. Peter, SSJ, superior general of the Sisters of St. Joseph of Rochester.

Religious communities explore means to pay retirement costs

By Carol Zimmermann
Catholic News Service

WASHINGTON (CNS) — A national collection to help women's and men's religious orders cover retirement costs for their elderly members has brought in about \$150 million since it was begun in 1988.

But to meet their needs, orders are not just relying on those collection funds, which are dispersed in grants in varying amounts based on need. Many are selling property, establishing retirement trust funds, utilizing their convent spaces more effectively and renovating and downsizing motherhouses to bring in revenue.

This year's collection — sponsored by the Tri-Conference Retirement Office — will be taken up in most dioceses across the country during the weekend of Dec. 10-11. Last year it brought in \$25.5 million.

(The Diocese of Rochester will not be participating in the collection. Instead, it has begun its own effort to aid retired sisters who have served in the diocese. [See story above.]

Mercy Sister Laura Reicks, associate director of the retirement office, said many orders now have development offices and emphasize jobs that provide salaries instead of stipends.

"There are a lot of collaborative efforts to cut costs," she said, "because there is greater communication between religious orders who are dealing with the same issues."

The Notre Dame Sisters currently take the pensions earned by their members and put them in a retirement fund. The sisters also take 5 percent of their salaries and add it to the fund.

Another example of how religious orders are trying to care for their elderly members with decreased resources is in Richfield, Ohio, where 22 religious communities in the dioceses of Cleveland and Youngstown, Ohio, and Pittsburgh support a shared retirement center.

"The need was so great, congregations were just waiting for our doors to open," said Sister Mildred Baker, a Sister of the Immaculate Heart of Mary who is intercongregational liaison for the Regina Health Center.

In 1985, congregation representatives began meeting to discuss the critical need of how to best care for their frail and elderly members.

Many congregations were so small that "they absolutely could not afford total care," Sister Baker told CNS. But without question, none of them wanted to send their own to private nursing homes or care centers.

"Without a central place for (elderly) religious to come that was a religious house, there would be a serious disruption to their lives," she added.

The solution came with the July 1993 opening of Regina Health Center, complete with an 81-bed skilled nursing area and 74 assisted-living units.

Residents currently include 76 women and men religious, six diocesan priests and 36 other individuals, mostly families of religious.

Word has spread of the center's success, so that now sisters involved in the center have become consultants to dioceses wanting to start similar projects.

In Davenport, Iowa, the 200-member Congregation of the Humility of Mary reached an agreement with the Sisters of Mercy and its Bishop Drumm Retirement Center in a Des Moines, Iowa, suburb to help build a 30-bed addition onto the facility. An initial contribution for construction came from a trust fund established for long-term care of the sisters. A campaign to raise about \$1.6 million has "gone over the top," according to one official.

For the Sisters of Charity of the Blessed Virgin Mary in Dubuque, Iowa, costs of caring for its 660 sisters age 65 and over reach nearly \$8 million annually.

In addition to using funds from the retirement collection, the order of 1,026 nuns has:

- Created a charitable trust, building it up by selling property, mostly girls' high schools.

- Involved its development office in working with donors on estate planning and wills.

- Renovated its two large retirement centers in Dubuque and Chicago, to include assisted living areas that allow elderly sisters to be part of an active retirement community for a

longer period of time. An increasing number of sisters also work as administrators for senior housing, parish nurses, hospital and hospice chaplains and in adult day care.

- Been involved with ministry to and with the aging in a center on motherhouse grounds. More than 20 retired sisters teach weekly classes, from computer study to foreign languages to bridge, to more than 320 seniors from the Dubuque area.

"Our goal is to create environments which meet the physical, spiritual—and emotional needs of our aging sisters — and to respond to new ministry needs as well," said the order's president, Sister Dolores Marie McHugh, who also serves on the Tri-Conference Advisory Committee.

The Sisters of the Presentation of the Blessed Virgin Mary, also based in Dubuque, have enhanced their care for aging members as hospital chaplains, pastoral ministers and in other roles. The order also has a sister enrolled in a course of study on gerontology for future ministry.

In Brooklyn, N.Y., the Mercy Sisters have reduced the area they use within their motherhouse and rent out the rest as single-family units. One of the order's members, Sister Mary Beata Gerrity, earns money through her professional singing in recordings, special appearances and concerts.

Sister Gerrity told *The Tablet*, Brooklyn's diocesan newspaper,

that she gives her earnings directly to the order and tries "to stay in tune with the needs of the Sisters of Mercy Retirement Fund. The older and sick sisters deserve the very best, because they've given their lives to the vocation."

And she is not the only one to find singing profitable. This year, Sisters in Song, a choral group made up of 57 sisters in 30 separate communities hailing from 21 states, have released two albums, including one for Christmas. Proceeds are divided between the Tri-Conference office and a national agency working on retirement needs, Support Our Aging Religious.

Creativity for raising retirement funds can be a parish effort. Father John Dompka, administrator of St. Margaret Mary Parish in a Pittsburgh suburb, plans something special to spark interest in the annual December collection.

Recently, the provincial superior of the Felician Sisters, was invited to speak about it at weekend Masses. As she concluded her talk, children dressed up as Dodge City characters slammed down a sack of money. "For the sisters," said two reformed bad guys, as Matt Dillon and Miss Kitty looked on.

Contributing to this story were Elaine Polomsky Soos in Youngstown, Jamie Bambara in Brooklyn, Judy Bandy in Dubuque and Pat Bartos in Pittsburgh.