



# National Religious Retirement Office







2015 Annual Report Supplement





## Funding Status

In 2015, 550 religious communities provided data to the National Religious Retirement Office (NRRO) regarding their assets available for retirement. From this information, the NRRO calculated the extent to which a community is adequately funded for retirement. Shown below are the number of religious institutes at each level of funding and the total number of women and men religious represented by these institutes.

### Retirement Funding Status and Membership of 550 Participating Religious Institutes

Amount Funded*	Number of Institutes			Total Members
	Women's	Men's	Total	
0-20%	168	33	201	 20,916
21-40%	37	12	49	 6,696
41-60%	48	11	59	 6,674
61-80%	43	20	63	 4,020
81-99%	91	42	133	 6,304
Adequately	33	12	45	 1,944
<b>Total</b>	<b>420</b>	<b>130</b>	<b>550</b>	<b>46,554</b>

\*The percentage of retirement funded is based on designated assets as of December 31, 2015, which were reported to the NRRO for the 2016 funding cycle.

Each symbol represents 500 religious.  
 Women  Men

Cover photo: (foreground) Sister Rita Polchin, SSCM, 87; (background) visit [www.retiredreligious.org/2016photos](http://www.retiredreligious.org/2016photos) for a list of names.

## From the Interim Executive Director

Dear Friends,

We are pleased to share this supplement to the *National Religious Retirement Office 2015 Annual Report*. The following pages provide detailed information on the financial support made possible by the Retirement Fund for Religious collection, including a state-by-state listing of religious communities that received funding. Highlights from 2015, as well as information on contributions and a fiscal review, can be found in the annual report itself, which is available at [www.retiredreligious.org](http://www.retiredreligious.org).\*

The bulk of the collection proceeds are distributed in the form of Direct Care Assistance. Religious communities combine these funds with their own income and savings to help meet a host of retirement and eldercare needs. Our Planning and Implementation Assistance program offers comprehensive financial and consultative support for communities with critical deficits in retirement funding. And various forms of educational assistance help religious congregations enhance the quality of life for senior members while planning more effectively for the future.

As the chart to the left illustrates, many congregations have made substantial progress in stabilizing retirement savings and are well on the way to managing long-term retirement needs. However, the largest single grouping is represented by those that have 20 percent or less of the financial resources necessary to adequately fund retirement. Clearly, there is work to be done, and we give thanks daily for all those whose prayers and generosity sustain our mission.

God bless,

*Sister Susan Schorsten, HM*

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Interim Executive Director



\* Hard copies of the annual report and/or supplement can be requested through our office. Please see the inside back cover for contact information.

## Distributions History

Since 1988, over \$745 million has been disbursed to religious institutes through Basic Grants/Direct Care Assistance and other forms of distribution to support the care of senior members.

Collection Year	Women's Institutes		Men's Institutes	
	Number	Distributions	Number	Distributions
<b>Direct Care Assistance*</b>				
Year 1, 1988	383	\$20,625,519.87	83	\$1,784,726.98
Year 2, 1989	466	17,185,779.40	124	2,136,613.57
Year 3, 1990	483	22,803,714.49	137	2,982,399.54
Year 4, 1991	457	18,094,155.69	138	2,605,844.31
Year 5, 1992	481	18,886,678.04	138	2,798,149.96
Year 6, 1993	503	20,037,614.71	144	2,990,316.40
Year 7, 1994	507	21,271,190.33	147	3,121,678.22
Year 8, 1995	493	20,499,187.78	143	3,000,812.22
Year 9, 1996	392	21,525,978.57	112	2,858,470.50
Year 10, 1997	405	22,723,003.53	119	3,280,539.30
Year 11, 1998	388	24,103,504.85	110	3,121,495.43
Year 12, 1999	386	21,868,188.81	110	3,165,740.38
Year 13, 2000	395	24,013,767.90	101	3,486,232.12
Year 14, 2001	426	23,797,328.81	112	3,202,671.23
Year 15, 2002	446	20,257,492.92	116	2,742,507.13
Year 16, 2003	424	17,341,105.87	119	2,590,623.98
Year 17, 2004	415	17,927,455.66	112	2,760,666.07
Year 18, 2005	418	20,149,699.31	111	2,957,975.39
Year 19, 2006	402	19,925,324.16	113	3,074,675.82
Year 20, 2007	369	19,591,006.55	113	3,408,993.58
Year 21, 2008	366	19,557,852.08	119	3,463,505.60
Year 22, 2009	363	19,357,292.13	114	3,683,135.27
Year 23, 2010	356	19,062,928.87	113	3,937,071.14
Year 24, 2011	341	18,809,588.72	112	4,190,411.33
Year 25, 2012	331	18,879,780.20	109	4,130,803.60
Year 26, 2013	320	18,728,866.18	104	4,271,133.92
Year 27, 2014	293	19,743,487.35	102	5,311,189.22
Year 28, 2015	295	19,303,664.94	106	5,696,335.08
<b>Subtotal</b>	<b>—</b>	<b>\$66,091,157.72</b>	<b>—</b>	<b>\$2,754,717.29</b>
<b>Other Assistance</b>		72,318,007.68		14,533,526.72
<b>Total</b>	<b>—</b>	<b>\$638,409,165.40</b>	<b>—</b>	<b>\$107,288,244.01</b>
<b>Total Assistance Awarded</b>		<b>\$745,697,409.41</b>		

\*Basic Grants, collection years 1–20.

## Direct Care Assistance

The 2015 collection for the Retirement Fund for Religious enabled the distribution of \$25 million in Direct Care Assistance to 401 religious institutes. These funds support the immediate care of elder religious and help religious institutes bolster retirement savings.

Direct Care Assistance is a per capita distribution based on specified criteria, including the percentage of retirement not funded, as measured by the national weighted average cost of care calculated by the National Religious Retirement Office, and the number of members age 60 and over.

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount	
Alabama	Cullman	Benedictine Sisters	41	28.43	\$29,232.16	
		Benedictine Society of Alabama	34	88.17	17,747.76	
Arizona	Nogales	Minim Daughters of Mary Immaculate	18	86.68	27,338.95	
		Phoenix	48	21.24	30,036.49	
		Sonoita	10	61.55	10,833.02	
		St. David	4	98.71	1,580.14	
		Tucson	16	94.06	32,922.05	
Arkansas	Jonesboro	Olivetian Benedictine Sisters	39	23.49	24,014.71	
		Little Rock	15	68.10	13,786.25	
		Subiaco	41	81.89	40,661.77	
California	Alhambra	Carmel of St. Teresa	14	99.64	15,833.88	
		Carmelite Sisters of the Most Sacred Heart	124	96.75	111,209.05	
	Aptos	Order of St. Clare	7	81.37	12,198.94	
	Arroyo Grande	Conventual Franciscans	45	91.58	21,861.91	
	Belmont	Sisters of Notre Dame de Namur	110	58.68	131,538.89	
	Big Sur	Camaldolese Monks, Order of St. Benedict	14	84.13	12,613.93	
	Bonita	Sister Servants of the Blessed Sacrament	49	86.16	42,693.92	
	Burlingame	Capuchin Franciscan Order	47	61.54	33,312.68	
	Culver City	Religious Sisters of Charity	29	2.62	14,123.22	
	Downey	Sisters of the Holy Faith	20	23.71	14,400.14	
	Encino	Sisters of Social Service	69	78.05	91,783.02	
	Garden Grove	Poor Clare Missionary Sisters	43	99.83	21,613.14	
	Gardena	Lovers of the Holy Cross of Los Angeles	64	67.66	19,298.67	
	Los Angeles		Franciscan Brothers	7	71.24	8,404.79
			Immaculate Heart Community	88	71.39	160,661.14
			Missionaries Guadalupanas of the Holy Spirit	45	74.81	39,729.53
			Monastery of the Angels	17	56.94	16,890.84
	Los Banos	Franciscan Hospitaller Sisters	17	87.25	26,604.83	
	Millbrae	Holy Ghost Fathers of Ireland	52	99.39	102,746.93	
	Modesto		Sisters of the Cross of the Sacred Heart of Jesus	9	95.08	4,824.90
Sisters of the Pious Schools			25	92.46	15,083.64	
Northridge		Society Devoted to the Sacred Heart	45	45.36	16,799.09	
		Franciscan Friars	169	81.15	185,346.07	
Oakland	Prince of Peace Abbey	22	84.48	19,598.03		
Rancho Palos Verdes	Daughters of Mary and Joseph	38	33.31	42,622.03		

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
California, continued	Redlands	Discalced Carmelite Friars	39	94.97	\$24,694.48
		Oblatas de Santa Marta	31	98.87	37,232.35
	Riverside	Society of the Divine Word	62	81.78	35,728.19
	San Diego	Carmelite Monastery of San Diego	14	79.80	17,959.13
	San Francisco	Salesian Society of Don Bosco	76	27.11	44,308.10
		Verbum Dei Missionary Fraternity	26	98.87	1,779.87
	Santa Maria	Josephite Fathers	10	18.93	3,188.15
	Solana Beach	The Eudists-Congregation of Jesus and Mary	12	88.89	8,788.46
	Thousand Oaks	Sisters of Notre Dame	55	57.42	50,867.18
	Tustin	Sisters of the Company of Mary	34	63.05	38,267.88
	Valyermo	Benedictine Monks	20	88.13	13,662.33
	Vina	New Clairvaux Abbey	20	89.85	22,642.92
	Whitethorn	Redwoods Monastery	10	83.38	8,124.37
	Colorado	Colorado Springs	Benet Hill Monastery	32	49.75
Denver		Capuchin Franciscans	68	76.73	48,149.95
		Capuchin Poor Clares	7	78.44	2,990.23
		Redemptorists	175	45.59	129,142.52
Snowmass	St. Benedict's Monastery	16	42.97	12,383.16	
Connecticut	Baltic	Sisters of Charity of Our Lady, Mother of the Church	60	98.16	52,653.89
		Bethlehem	Benedictine Congregation	36	78.59
	Branford	Benedictines of Jesus Crucified	15	50.34	16,050.93
	East Haven	Sisters of Charity of Our Lady Mother of Mercy	8	30.37	7,992.28
	Hamden	Apostles of the Sacred Heart of Jesus	121	33.71	55,045.72
	Meriden	Franciscan Sisters of the Eucharist	82	43.06	48,967.90
	Middletown	Daughters of Our Lady of the Garden	12	89.37	7,284.20
	Putnam	Daughters of the Holy Spirit	77	28.65	94,501.47
	Stamford	Little Workers of the Sacred Heart of Jesus			31,327.93
	West Hartford	Sisters of St. Joseph	89	38.63	122,374.59
		Wilmington	Capuchin Poor Clare Nuns, Inc.	11	99.36
Delaware	Washington	Oblates of St. Francis de Sales	150	82.07	169,954.82
		Carmelite Sisters of Charity	13	58.82	17,825.25
District of Columbia	Washington	Piarist Fathers	46	98.54	26,821.55
		Religious of Mary Immaculate	15	92.61	13,639.15
		Servants of the Lord and the Virgin of Matara	101	99.38	3,176.83
		Sisters of Notre Dame de Namur	54	2.06	19,933.05
		Society of Mary	94	47.38	109,895.49
		U.S. Province of the Religious of Jesus and Mary	79	13.43	52,468.66
		Florida	Delray Beach	Christ the King Monastery	8
Largo	Sisters of St. Clare		10	89.76	11,472.06
Miami	Claretian Missionary Sisters		10	92.68	8,348.53

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
Georgia	Conyers	Monastery of the Holy Spirit	35	97.57	\$41,620.81
	Savannah	Carmelite Monastery			3,245.66
Hawaii	Kaneohe	Carmelite Monastery			5,283.49
Idaho	Cottonwood	Benedictine Sisters	44	52.10	48,108.16
	Jerome	Monastery of the Ascension	12	41.93	9,848.62
Illinois	Alton	Sisters of St. Francis of the Martyr St. George	114	84.44	36,270.85
	Arlington Heights	Sisters of the Living Word	59	41.88	60,924.84
		Benedictines of Marmion Abbey	21	88.22	19,511.60
	Aurora	Missionaries of the Sacred Heart	43	90.34	71,169.56
		Poor Clare Monastery of Our Lady of Mercy			6,151.29
	Chicago	Augustinians	87	60.61	89,491.10
		Benedictine Sisters	38	14.98	28,477.51
		Congregation of the Resurrection	58	96.37	47,500.83
		Conventual Franciscans of St. Bonaventure Province	44	89.11	24,232.71
		Dominicans	152	64.04	128,762.38
		Order of Friar Servants of Mary	48	29.56	43,796.29
	Joliet	Sisters of St. Francis of Mary Immaculate	139	15.23	118,074.10
	Lacon	Daughters of St. Francis of Assisi	12	53.44	8,830.37
	Lisle	Benedictine Sisters of the Sacred Heart	24	7.23	16,542.17
	Melrose Park	Missionary Sisters of St. Charles Borromeo	61	80.72	38,326.10
	Momence	Hospitaller Order of St. John of God	36	47.11	24,836.31
	Oak Park	Missionaries of St. Charles	67	60.82	34,436.36
Park Ridge	Congregation of the Passion	55	67.53	75,806.71	
Peru	Benedictine Monks	16	87.66	17,775.61	
Springfield	Dominican Monastery of Mary the Queen	15	77.73	18,397.29	
	Dominican Sisters	202	25.64	158,969.83	
Wheaton	Institute of the Blessed Virgin Mary	62	58.47	99,686.92	
Indiana	Beech Grove	Benedictine Sisters	59	21.04	31,251.55
	Ferdinand	Sisters of St. Benedict	140	62.54	186,620.35
	Mount St. Francis	Conventual Franciscans, Province of Our Lady of Consolation	84	81.57	108,354.62
	Notre Dame	Brothers of Holy Cross	100	3.03	57,242.48
		Congregation of Holy Cross, U.S. Province of Priest and Brothers	307	41.34	210,711.46
	Oldenburg	Sisters of St. Francis of the Third Order	199	57.58	271,297.90
	St. Mary-of-the-Woods	Sisters of Providence	303	55.47	452,733.72
	St. Meinrad	Benedictine Monks	90	68.23	77,127.90
	Terre Haute	Discalced Carmelite Monastery	14	14.80	3,094.94
Iowa	Davenport	Congregation of the Humility of Mary	90	11.62	72,062.53
	Eldridge	Queen of Heaven Carmelite Monastery	8	70.24	8,527.64

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
<b>Kansas</b>	<b>Atchison</b>	Benedictine Sisters	127	31.93	\$140,005.40
		St. Benedict's Abbey	45	71.37	33,593.80
	<b>Colwich</b>	Sisters of the Immaculate Heart	25	3.47	1,000.00
	<b>Kansas City</b>	Sister Servants of Mary	95	66.19	48,268.70
<b>Kentucky</b>	<b>Louisville</b>	Discalced Carmelite Monastery	8	62.79	9,304.84
	<b>Nerinx</b>	Sisters of Loretto at the Foot of the Cross	166	3.57	97,035.50
	<b>Owensboro</b>	Home Mission Sisters of America			5,431.87
		Sisters of the Lamb of God	7	93.56	6,158.92
<b>Louisiana</b>	<b>Villa Hills</b>	St. Walburg Monastery	47	36.84	21,971.88
	<b>Abita Springs</b>	Sisters of St. Benedict	5	84.36	8,268.06
	<b>Covington</b>	Society of St. Teresa of Jesus	25	52.62	28,222.34
	<b>Lacombe</b>	Congregation of Our Lady of Mt. Carmel	75	41.08	64,174.04
	<b>Metairie</b>	Southern Dominican Province of St. Martin de Porres	98	95.28	88,518.31
	<b>New Orleans</b>	Brothers of the Sacred Heart	39	6.69	20,289.99
		Daughters of Our Lady of the Holy Rosary	70	76.89	21,527.38
		Franciscan Poor Clares	9	45.34	8,444.07
		Marianites of Holy Cross	106	7.43	69,914.72
		Sisters of the Holy Family	90	87.94	203,862.70
		<b>Shreveport</b>	Sisters of Our Lady of Sorrow	24	84.16
<b>St. Benedict</b>		Benedictine Monks	28	56.81	17,997.91
<b>Maine</b>	<b>Alfred</b>	Brothers of Christian Instruction	17	17.85	11,032.44
	<b>Biddeford</b>	Servants of the Immaculate Heart of Mary	40	54.76	59,653.23
	<b>Old Orchard Beach</b>	Sisters of Our Lady of the Holy Rosary	9	78.57	8,084.12
	<b>Waterville</b>	Servants of the Blessed Sacrament			6,791.81
<b>Maryland</b>	<b>Baltimore</b>	Carmelite Sisters of Baltimore	16	40.80	13,217.33
		Institute of Mission Helpers of Baltimore City, Inc.	48	69.08	70,237.50
		Oblate Sisters of Providence	60	84.57	96,594.97
		Order of the Most Holy Trinity and of the Captives	31	84.38	26,776.39
		School Sisters of Notre Dame	473	1.78	250,130.31
		Sisters of Notre Dame de Namur	43	32.10	37,395.86
		St. Joseph's Society of the Sacred Heart	83	39.02	51,442.78
		<b>Childs</b>	Oblate Sisters of St. Francis de Sales	14	35.82
	<b>Ellicott City</b>	Franciscan Friars	209	21.39	88,689.48
	<b>Lutherville</b>	Benedictine Sisters of Baltimore	16	52.45	20,170.86
	<b>Potomac</b>	Little Sisters of the Holy Family	11	94.14	4,214.36
	<b>Salisbury</b>	Little Sisters of Jesus and Mary	7	92.15	8,431.00
	<b>Silver Spring</b>	Missionary Servants of the Most Holy Trinity	123	42.14	62,083.80

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
<b>Massachusetts</b>	<b>Boston</b>	Brotherhood of Hope	20	58.79	\$1,728.66
		Daughters of St. Paul	144	99.58	111,510.42
		Oblates of the Virgin Mary	48	67.59	21,466.12
	<b>Brighton</b>	Assumptionists	27	26.54	21,422.18
		Franciscan Missionary Sisters for Africa	6	99.28	7,665.47
		Sisters of St. Joseph	296	37.25	90,857.07
	<b>Hingham</b>	Glastonbury Abbey	9	98.54	8,505.35
	<b>Holyoke</b>	Daughters of the Heart of Mary	42	9.12	21,802.34
		Franciscan Missionary Sisters of Assisi			5,421.51
		Sisters of St. Joseph of Springfield	213	69.74	341,536.25
	<b>Jamaica Plain</b>	Franciscan Monastery of St. Clare			5,870.44
	<b>Marlborough</b>	Sisters of St. Anne	81	4.93	24,996.37
	<b>Methuen</b>	Sisters of the Presentation of Mary, Inc.	166	42.25	207,716.55
	<b>Milton</b>	Holy Union Sisters	78	7.48	32,204.30
	<b>Newton</b>	Missionary Franciscan Sisters of the Immaculate Conception	101	31.08	51,816.60
		St. Mary's Monastery	6	86.04	1,423.14
		St. Scholastica Priory, Benedictine Nuns	11	87.23	7,919.98
	<b>Spencer</b>	St. Joseph's Abbey	53	90.36	65,180.35
	<b>Still River</b>	Slaves of the Immaculate Heart of Mary			11,505.78
	<b>Tyringham</b>	Sisters of the Visitation	15	10.63	4,340.60
	<b>Waltham</b>	Missionary Sisters of the Society of Mary	76	52.05	100,918.17
	<b>Wellesley</b>	Sisters of Charity of St. Vincent de Paul—Retirement Community	62	35.06	42,225.21
		Sisters of Charity of St. Vincent de Paul	59	64.92	43,545.38
	<b>Worcester</b>	Religious Venerini Sisters	20	80.56	38,391.34
	<b>Wrentham</b>	Mount St. Mary's Abbey	42	64.78	40,211.49
		Sisters of St. Chretienne	41	15.27	22,023.33
	<b>Michigan</b>	<b>Belmont</b>	Consolata Missionary Sisters	23	87.88
<b>Detroit</b>		Province of St. Joseph of the Capuchin Order	169	15.95	93,164.20
		Sisters, Home Visitors of Mary	10	42.80	11,681.83
<b>Farmington Hills</b>		Monastery of the Blessed Sacrament	30	48.62	23,160.01
<b>Grand Rapids</b>		Grand Rapids Dominicans			119,204.00
<b>Lansing</b>		Benedictine Sisters	2	98.03	4,429.28
<b>Marquette</b>		Sisters of St. Paul of Chartres	12	95.36	6,541.78
<b>Monroe</b>		Sisters, Servants of the Immaculate Heart of Mary	338	15.34	285,528.77
		Servants of Jesus	13	36.95	12,761.28
		Sisters of St. Clare			3,582.75
<b>Wyandotte</b>		Pallottine Fathers	9	84.65	10,003.62
<b>Minnesota</b>	<b>Collegeville</b>	St. John's Abbey	125	51.32	108,756.21
	<b>St. Paul</b>	Benedictine Sisters	40	0.75	21,339.99
<b>Mississippi</b>	<b>Bay St. Louis</b>	Divine Word Missionaries	61	93.22	45,741.41

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount	
<b>Missouri</b>	<b>Ava</b>	Nazareth Hermitage			\$8,071.43	
	<b>Carthage</b>	Congregation of the Mother Coredeptrix	125	94.48	51,744.89	
	<b>Conception</b>	Benedictines of Conception Abbey	53	76.82	55,566.62	
	<b>Dittmer</b>	Servants of the Paraclete	17	79.21	26,619.00	
	<b>High Ridge</b>	Daughters of Our Mother of Peace	16	98.72	15,864.17	
		Sons of Our Mother of Peace	5	99.05	4,526.70	
	<b>Independence</b>	Sisters of St. Francis of Holy Eucharist	12	57.00	10,921.08	
	<b>Liberty</b>	Benedictine Sisters	4	100.00	1,990.00	
	<b>Liguori</b>	Order of the Most Holy Redeemer	16	80.03	20,631.49	
	<b>Savannah</b>	Sisters of St. Francis	7	81.15	12,343.09	
	<b>St. Louis</b>	Franciscan Friars	217	64.71	255,208.85	
		Franciscan Sisters of Our Lady of Perpetual Help	88	44.46	94,540.87	
		Missionaries of the Holy Family	17	33.40	14,916.76	
		School Sisters of Notre Dame	998	32.31	1,086,072.15	
Ursuline Provincialate, Central Province of the U.S.		115	36.17	147,270.41		
<b>Montana</b>	<b>Great Falls</b>	Poor Clares of Montana	4	95.33	6,000.68	
<b>Nebraska</b>	<b>Elkhorn</b>	Mount Michael Benedictine Abbey	22	44.75	14,049.28	
	<b>Lincoln</b>	School Sisters of Christ the King	32	59.78	1,000.00	
	<b>Omaha</b>	Franciscan Monastery of St. Clare	9	79.26	10,565.01	
		Servants of Mary	73	58.25	99,720.64	
<b>St. Columbans</b>	Missionary Society of St. Columban	73	92.18	109,759.10		
<b>Nevada</b>	<b>Reno</b>	Our Lady of the Mountains Monastery	14	5.04	5,902.52	
<b>New Hampshire</b>	<b>Manchester</b>	Sisters of Holy Cross	101	93.88	200,827.03	
<b>New Jersey</b>	<b>Belvidere</b>	Augustinian Recollect Sisters	8	99.83	5,175.59	
	<b>Caldwell</b>	Sisters of St. Dominic	127	47.64	176,680.32	
	<b>Cherry Hill</b>	Franciscan Missionary Sisters of the Infant Jesus	13	94.69	11,005.62	
		Little Servant Sisters of the Immaculate Conception	64	94.96	58,169.05	
	<b>Chesterfield</b>	Monastery of St. Clare	13	47.34	10,614.87	
	<b>Convent Station</b>	Sisters of Charity of St. Elizabeth	298	59.69	497,619.03	
	<b>Haledon</b>	Daughters of Mary Help of Christians	91	84.87	91,612.96	
	<b>Morristown</b>	Monastery of Discalced Carmelite Nuns	18	97.28	4,131.68	
	<b>Newfield</b>	Daughters of Our Lady of Mercy	32	56.62	39,952.95	
	<b>Paterson</b>	Missionary Sisters of Immaculate Conception	27	25.54	24,412.62	
	<b>Summit</b>	Dominican Nuns	20	98.80	16,326.70	
	<b>Tenaflly</b>	Society of African Missions	18	32.85	10,854.26	
	<b>Union City</b>	Order of Friars Minor Capuchin			30,665.17	
	<b>West Orange</b>	Augustinian Recollects	38	68.68	30,993.21	
	<b>New Mexico</b>	<b>Abiquiu</b>	Monastery of Christ in the Desert	45	100.00	16,873.52
		<b>Blanco</b>	Monastery of Our Lady of the Desert	9	99.54	5,473.76
	<b>New York</b>	<b>Amityville</b>	Dominican Sisters	402	13.52	58,821.73
<b>Astoria</b>		Sisters of the Good Shepherd	53	46.48	62,892.59	
<b>Beacon</b>		Redemptoristine Nuns	7	21.82	3,519.64	
<b>Blaauvelt</b>		Sisters of St. Dominic	122	27.13	88,976.67	
<b>Brentwood</b>		Sisters of St. Joseph	500	17.60	99,500.57	

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
<b>New York, continued</b>	<b>Bronx</b>	Dominican Nuns of Perpetual Adoration	10	65.98	\$7,280.33
		Franciscan Missionaries of Mary	93	88.03	150,939.39
		Sisters of St. John the Baptist	77	33.87	53,287.14
	<b>Brooklyn</b>	Sisters of the Visitation of Brooklyn	16	57.44	14,784.53
		<b>Buffalo</b>	Dominican Nuns		
		Sisters of Mercy of the Americas	391	2.55	199,391.76
		Sisters of Social Service of Buffalo	12	39.83	8,152.40
		Sisters of St. Mary of Namur	72	66.37	102,290.24
	<b>City Island</b>	Medical Missionaries of Mary	27	45.03	27,999.22
	<b>Clarence</b>	Sisters of St. Joseph	73	40.02	101,852.67
	<b>Forest Hills</b>	Marist Brothers	148	11.79	62,044.82
	<b>Garrison</b>	Franciscan Friars of the Atonement	71	9.86	43,701.49
		Franciscan Sisters of the Atonement	106	57.58	146,720.56
	<b>Hopewell Junction</b>	Sisters Oblates to the Blessed Trinity	39	100.00	41,381.81
	<b>Huntington</b>	Missionary Sisters of St. Benedict	33	98.12	14,605.25
	<b>Islip</b>	Daughters of Wisdom	79	24.79	57,377.36
	<b>Jamaica</b>	Ursuline Sisters of Tildonk	42	64.63	51,821.12
	<b>Latham</b>	Sisters of St. Joseph of Carondelet			89,835.92
	<b>Lewiston</b>	Sisters of the Sacred Heart of Jesus	16	92.54	14,719.55
	<b>Middletown</b>	Carmelite Friars	73	47.87	30,711.25
	<b>Monroe</b>	Parish Visitors of Mary Immaculate			31,761.72
	<b>New Rochelle</b>	Christian Brothers			197,276.00
		Salesian Society, Inc.	118	88.86	128,462.00
	<b>New Windsor</b>	Sisters of the Presentation of the Blessed Virgin Mary	115	11.56	63,148.08
	<b>New York</b>	Dominican Province of St. Joseph	271	75.25	157,782.86
		Little Sisters of the Assumption	17	33.15	17,595.18
		Missionary Sisters of the Sacred Heart of Jesus	77	43.34	90,188.80
		Paulist Fathers	113	59.14	115,044.89
	<b>Nyack</b>	Sisters of Christian Doctrine	17	26.76	15,323.73
	<b>Peekskill</b>	Franciscan Missionary Sisters of the Sacred Heart	30	71.01	34,529.02
	<b>Piffard</b>	Genesee Abbey	28	70.73	29,609.04
	<b>Rego Park</b>	Sisters of Charity-Halifax	65	65.07	40,759.88
	<b>Rhinebeck</b>	Society of St. Ursula	24	43.66	21,460.87
	<b>Rochester</b>	Sisters of St. Joseph	210	57.10	288,300.35
	<b>Rye Brook</b>	Congregation of the Passion	110	14.33	68,257.86
	<b>Silver Creek</b>	Missionary Sisters of St. Columban	18	95.82	34,092.42
	<b>Sloatsburg</b>	Sisters Servants of Mary Immaculate	26	54.19	31,450.84
	<b>Sparkill</b>	Dominican Convent of Our Lady of the Rosary	269	42.18	274,613.55
	<b>Staten Island</b>	Sister Disciples of the Divine Master	37	92.32	48,827.42
Society of St. Paul		29	98.39	37,582.51	
<b>Suffern</b>	Sisters of Life	94	96.41	6,206.45	
<b>Syracuse</b>	Sisters of St. Francis	410	44.24	293,546.84	
<b>White Plains</b>	Province of St. Mary of the Capuchin Order	145	53.14	105,553.48	
	Sisters of the Divine Compassion	79	79.85	133,680.64	
<b>Windsor</b>	Benedictine Sisters	4	92.30	7,844.88	
<b>Youngstown</b>	Clerics Regular of St. Paul	13	78.56	11,611.64	

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
<b>North Dakota</b>	<b>Richardton</b>	Assumption Abbey	40	40.02	\$28,173.50
<b>Ohio</b>	<b>Canfield</b>	Ursuline Sisters	44	31.48	42,898.20
	<b>Canton</b>	Poor Clare Nuns of Perpetual Adoration	12	96.49	12,023.28
	<b>Cincinnati</b>	Comboni Missionaries of the Heart of Jesus	34	27.70	17,674.93
		Monastery of St. Clare	7	78.57	4,373.91
	<b>Cleveland</b>	Mercedarian Sisters of the Blessed Sacrament	28	96.35	36,717.44
		Poor Clares of Perpetual Adoration			5,899.15
		St. Andrew Abbey			25,486.44
	<b>Euclid</b>	Sisters of the Most Holy Trinity	19	97.76	23,985.30
	<b>Garfield Heights</b>	Sisters of the Holy Spirit	5	97.00	6,355.01
	<b>Highland Heights</b>	Congregation of the Blessed Sacrament			41,643.87
	<b>Hubbard</b>	Oblate Sisters of the Sacred Heart of Jesus	16	59.95	8,727.70
	<b>Louisville</b>	Sisters of St. Joseph of St. Mark	8	21.79	6,027.57
	<b>North Jackson</b>	Antonine Sisters	7	90.83	3,696.64
	<b>Pepper Pike</b>	Ursuline Sisters of Cleveland	156	6.77	86,460.20
	<b>Tiffin</b>	Sisters of the Third Order Regular of St. Francis of Penance and of Charity	87	65.05	128,703.43
	<b>Toledo</b>	Oblates of St. Francis de Sales	56	14.46	25,130.53
		Sisters of Notre Dame	180	20.70	123,386.36
		Visitation Monastery	19	75.49	12,118.00
	<b>Toronto</b>	Franciscan Sisters, Third Order Regular	28	92.41	3,423.49
<b>Oklahoma</b>	<b>Oklahoma City</b>	Carmelite Sisters of St. Therese of the Infant Jesus	14	6.57	8,113.04
	<b>Shawnee</b>	Benedictine Fathers	24	86.43	29,742.69
<b>Oregon</b>	<b>Banks</b>	Missionaries of the Holy Spirit	43	78.06	16,660.20
	<b>Beaverton</b>	Franciscan Missionary Sisters of Our Lady of Sorrows	32	62.27	27,495.86
	<b>Carlton</b>	Guadalupe Abbey	28	83.35	43,738.60
	<b>Mt. Angel</b>	Benedictine Sisters of Mt. Angel	35	26.89	29,410.78
	<b>Portland</b>	Sisters of Reparation	2	89.94	3,805.38
		Society of Jesus	189	52.66	176,975.35
	<b>St. Benedict</b>	Benedictines of Mount Angel Abbey	48	74.76	29,583.76

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
<b>Pennsylvania</b>	<b>Allison Park</b>	Sisters of Divine Providence	200	46.58	\$227,634.76
	<b>Baden</b>	Sisters of St. Joseph	179	50.03	230,677.38
	<b>Bakerstown</b>	Benedictine Sisters	46	68.85	74,886.51
	<b>Bensalem</b>	Sisters of the Blessed Sacrament	104	30.11	82,018.62
	<b>Danville</b>	Sisters of Sts. Cyril and Methodius	75	5.22	25,599.12
	<b>Erie</b>	Benedictine Sisters	97	75.07	142,054.54
		Sisters of St. Joseph of Northwestern Pennsylvania	105	40.48	128,148.24
	<b>Gallitzin</b>	Carmelite Community of the Word	15	46.01	9,129.91
	<b>Greensburg</b>	Sisters of Charity of Seton Hill	173	30.53	200,607.96
		Sisters of St. Benedict	8	73.18	6,979.40
	<b>Haverford</b>	Handmaids of the Sacred Heart of Jesus	33	72.92	33,768.12
	<b>Holidaysburg</b>	Third Order Regular of St. Francis	31	47.65	30,553.11
	<b>Jenkintown</b>	Sisters of the Order of St. Basil the Great	33	70.84	52,080.10
	<b>Latrobe</b>	Carmel of the Assumption	12	84.78	16,245.78
	<b>Loretto</b>	Third Order Regular of St. Francis	114	70.09	105,378.87
	<b>Meadowbrook</b>	Sisters of the Holy Redeemer	18	31.07	4,835.43
	<b>Merion</b>	Sisters of Mercy of the Americas	847	35.85	708,646.42
	<b>New Ringgold</b>	Cistercian Fathers			5,400.87
	<b>Paoli</b>	Canons Regular of Premontre			16,764.03
	<b>Philadelphia</b>	Missionary Servants of the Most Blessed Trinity	112	9.30	57,649.61
		Society of Catholic Medical Missionaries	100	9.88	66,002.80
	<b>Pittsburgh</b>	Capuchin Franciscan Province of St. Augustine	123	31.03	56,508.79
		School Sisters of the Third Order Regular of St. Francis	79	47.07	95,581.24
		Sisters of St. Francis of the Providence of God	29	28.73	30,764.89
	<b>Reading</b>	Bernardine Franciscan Sisters	192	39.38	204,546.68
		Missionary Sisters of the Most Sacred Heart	55	73.97	66,130.96
		Missionary Sisters of the Precious Blood	24	85.36	21,095.57
	<b>Scranton</b>	Servants of the Immaculate Heart of Mary	370	34.13	286,752.82
	<b>Uniontown</b>	Sisters of St. Basil the Great	50	78.98	105,770.76
	<b>Villanova</b>	Order of St. Augustine	156	48.96	113,197.52
<b>Puerto Rico</b>	<b>Humacao</b>	Benedictine Sisters	10	88.92	11,443.56
<b>Rhode Island</b>	<b>Barrington</b>	Monastery of Discalced Carmelites	13	70.70	17,978.67
	<b>Bristol</b>	Sisters of St. Dorothy	29	33.68	23,780.14
	<b>Cumberland</b>	Sisters of Mercy of the Americas	569	28.66	646,770.89
	<b>Middletown</b>	Sisters of St. Joseph of Cluny	18	20.99	15,104.88
	<b>North Kingstown</b>	Sisters of the Cross and Passion	29	32.11	25,375.46
	<b>Pascoag</b>	Sacred Heart Brothers	57	51.42	63,134.64
<b>South Carolina</b>	<b>Travelers Rest</b>	Monastery of St. Clare	16	93.66	19,649.52
<b>Tennessee</b>	<b>Nashville</b>	Dominican Sisters of St. Cecilia	295	88.70	57,098.97

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount		
Texas	Amarillo	Capuchin Poor Clares of the Blessed Sacrament			\$12,331.99		
		Franciscan Sisters of Mary Immaculate	17	98.42	15,432.99		
	Austin	Franciscanas Hijas de la Misericordia	6	72.07	5,584.49		
	Canyon	St. Benedict's Monastery	6	85.21	6,708.79		
	Corpus Christi	Congregation of the Incarnate Word and Blessed Sacrament	46	2.39	19,305.09		
		Sisters of the Society of Our Lady of the Most Holy Trinity	78	99.66	29,539.08		
		Society of Our Lady of the Most Holy Trinity	96	98.27	45,452.16		
	El Paso	Good Shepherd Convent	11	93.77	19,107.91		
		Servants of the Sacred Heart of Jesus and the Poor	14	89.54	6,418.16		
		Sisters of Perpetual Adoration	8	98.35	9,741.03		
	Fort Worth	Sisters of St. Mary of Namur	37	42.71	40,642.44		
	Houston	Dominican Sisters of Mary Immaculate Province	101	96.88	20,047.99		
		Missionary Carmelites of St. Teresa	58	48.76	51,789.54		
	Kingsville	Missionary Daughters of the Most Pure Virgin Mary	21	98.48	25,072.76		
	New Caney	Discalced Carmelite Nuns	8	22.83	4,038.72		
	Panhandle	School Sisters of the Third Order of St. Francis			18,888.17		
	Prayer Town	Disciples of the Lord Jesus Christ	39	96.57	8,671.37		
	San Antonio	Congregation of Divine Providence	152	36.30	187,753.13		
		Cordi-Marian Sisters	28	93.92	38,771.72		
		Eucharistic Franciscan Missionary Sisters	9	99.41	14,030.81		
		Hermanas Catequistas Guadalupanas	15	97.30	22,854.64		
		Institute of the Daughters of Mary	99	96.34	135,106.82		
		Misioneras de Nuestra Sra del Perpetuo Socorro	18	99.60	17,853.74		
		Missionaries of the Sacred Heart	12	50.70	11,834.85		
		Missionary Catechists of Divine Providence	33	61.73	39,850.16		
		Sisters of Charity of the Incarnate Word	149	57.91	225,529.86		
		Sisters of Perpetual Adoration	11	97.61	15,360.15		
		Sisters of the Sacred Heart of Jesus	38	47.35	47,068.41		
		Victoria	Missionary Catechists of the Sacred Hearts of Jesus and Mary	42	85.53	56,558.92	
		Wolfforth	St. Francis Mission Community	16	94.78	18,414.23	
		Utah	Salt Lake City	Discalced Carmelite Nuns	12	80.62	8,065.13
		Vermont	Westfield	Benedictine Nuns of the Congregation of Solesmes	13	91.15	12,026.83
		Virgin Islands	Frederiksted, St. Croix	Missionary Sisters of the Immaculate Heart of Mary	22	95.62	14,057.25

**Fund Distributions**  
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
Virginia	Berryville	Holy Cross Abbey	12	29.19	\$9,332.59
	Crozet	Our Lady of the Angels Monastery	15	92.65	13,046.88
	Linden	Dominican Nuns	12	94.76	2,774.01
Washington	Richmond	Comboni Missionary Sisters	17	89.65	10,358.91
	Lacey	Sisters of St. Benedict	12	44.38	10,401.24
	Olympia	Holy Theophany Monastery	4	100.00	5,433.63
	Spokane	Sisters of Mary, Mother of the Church	12	95.89	2,031.85
Wisconsin	Tacoma	Dominican Sisters	50	21.19	48,633.17
	Beloit	Auxiliaries of the Blessed Sacrament	4	89.37	6,257.13
	Fond du Lac	Sisters of St. Agnes	215	26.55	185,864.39
	Franklin	Franciscan Friars Assumption, Blessed Virgin Mary Province, Inc.	105	63.69	134,637.01
	Green Bay	Sisters of St. Francis of the Holy Cross	58	7.71	36,694.03
	Hudson	Carmelite Nuns of the Diocese of Superior	6	82.89	4,408.63
	Milwaukee	School Sisters of St. Francis	425	32.88	528,420.73
		Sisters of the Divine Savior	68	21.09	61,375.19
		Society of the Divine Savior	87	49.13	76,603.46
	Prairie du Sac	Cistercian Nuns	22	93.58	12,208.99
	Sinsinawa	Sinsinawa Dominican Sisters	450	23.95	441,703.74
	St. Francis	Sisters of St. Francis of Assisi	199	26.90	199,566.01
	Stevens Point	Sisters of St. Joseph, Third Order of St. Francis	236	66.14	346,892.25
<b>Total Direct Care Assistance:</b>		<b>401 Distributions</b>			<b>\$25,000,000.02</b>

An additional 149 religious institutes submitted demographic and financial data to the National Religious Retirement Office (NRRO). Some provided information but did not request financial assistance. Others applied but did not receive funding, as they are adequately funded per the NRRO distribution calculation. Visit [www.retiredreligious.org](http://www.retiredreligious.org) to view a PDF listing of these institutes.



## Planning and Implementation Assistance

In 2009, the National Religious Retirement Office (NRRO) replaced the former Special Assistance and Supplemental Grants with Planning and Implementation Assistance. This expanded consultation initiative combines the former grant programs into a cohesive planning process. Over a period of 18 to 24 months, the major superior, treasurer, and retirement director of each participating institute work with two NRRO-trained consultants to identify their retirement-funding challenges and to develop strategies to address the deficits. Communities may request funds for both the planning phase and the implementation phase. The following institutes entered the program in 2015. Some have completed the process, and others continue to work with NRRO staff and consultants to refine their plan. Funds allocated but not disbursed in 2015 will be available for distribution in 2016.

<b>Assumption Abbey</b>	Richardton, ND
<b>Conventual Franciscans</b>	Arroyo Grande, CA
<b>Daughters of Our Lady of the Holy Rosary</b>	New Orleans, LA
<b>Disciples of the Lord Jesus Christ</b>	Prayer Town, TX
<b>Dominican Province of St. Joseph</b>	New York, NY
<b>Dominican Sisters of Mary Immaculate Province</b>	Houston, TX
<b>Missionary Servants of the Most Blessed Trinity</b>	Philadelphia, PA
<b>Redemptorists</b>	Denver, CO
<b>School Sisters of Christ the King</b>	Lincoln, NE
<b>Sisters of Charity of Our Lady of Mercy</b>	Charleston, SC
<b>Sisters of Divine Providence</b>	Allison Park, PA
<b>Sisters of St. Joseph</b>	Baden, PA
<b>Sisters of the Society of Our Lady of the Most Holy Trinity</b>	Corpus Christi, TX
<b>Society of Our Lady of the Most Holy Trinity</b>	Corpus Christi, TX
<b>Total religious institutes entering Planning and Implementation Assistance in 2015</b>	<b>14</b>

In 2015, \$1,712,963.69 was distributed to 20 institutes in the form of Planning Assistance. Awards ranged from \$4,053.23 to \$330,100.00.\*

In 2015, \$3,350,450.00 was distributed to 10 institutes in the form of Implementation Assistance. Assistance ranged from \$100,000.00 to \$600,000.00.\*

\*Totals include distributions to some religious communities that entered Planning and Implementation Assistance in previous years and received funding in 2015.

## Management and Continuing Education Assistance

In 2015, \$196,346.15 was distributed in Management and Continuing Education Assistance. Religious institutes that are 50 percent or more underfunded for retirement may apply for assistance throughout the year. Distributions of up to \$5,000 may be used to support ongoing education for key management personnel in areas related to retirement planning, including financial management, eldercare delivery, and fund-raising. These funds may also be used to supplement the acquisition of basic management tools, such as a financial forecast or the first-time computerization of accounting or development records.

<b>Total participating institutes</b>	<b>56</b>
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# Acknowledgments

## (Arch)diocesan Coordinators

As liaisons with the National Religious Retirement Office, diocesan coordinators manage local campaigns, recruit volunteers and professional advisors, and conduct local media relations.

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Sister Margaret Kuntz, ASCJ  
**St. Augustine**  
Sister Mary Victoria Will, SND  
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**Sioux City**  
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**Kansas City**  
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**Lafayette**  
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**Shreveport**  
Very Reverend Rothell Price

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**Baltimore**  
Sister Maria Luz Ortiz, MSHS

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Sister Marian Batho, CSJ  
**Fall River**  
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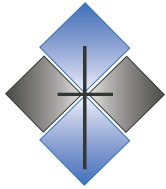
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