









National Religious Retirement Office

2016 Annual Report Supplement



Funding Status

In 2016, 539 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 539 Participating Religious Institutes

Amount Funded*	Number of Institutes			Total Members
	Women's	Men's	Total	
0-20%	159	36	195	 21,046
21-40%	40	10	50	 6,179
41-60%	41	12	53	 5,693
61-80%	31	24	55	 3,503
81-99%	106	39	145	 6,438
Adequately	28	13	41	 2,012
Total	405	134	539	44,871

*The percentage of retirement funded is based on designated assets as of December 31, 2016.

Each symbol represents 500 religious.
 Women  Men

Cover photo (from left): Sister Alfonsina Sanchez and care coordinator Sister Michelle Clines, RN, members of the Carmelite Sisters of the Most Sacred Heart of Los Angeles.

From the Executive Director

Dear Friends,

I am pleased to share this supplement to the *National Religious Retirement Office 2016 Annual Report*. The following pages detail the far-reaching impact of donations to the Retirement Fund for Religious (RFR) collection. (Information regarding contributions to the collection and a fiscal review can be found in the annual report itself, which is available at retiredreligious.org.*)

Religious communities combine RFR funding with their own income and savings to meet the current and future needs of senior members. They also utilize the educational and consultative resources the collection makes possible to stretch retirement dollars and enhance eldercare. This assistance has helped numerous congregations transform their retirement-funding deficits into manageable concerns. Yet, as the chart to the left demonstrates, a significant number still have profound needs. Your support allows us to continue the mission to assure all elderly religious a safe, modest retirement.

What is perhaps hidden in these pages is how helping religious communities address their retirement funding challenges also helps them continue to focus on mission and ministry. In the end, religious communities have the same goal: to provide loving care for elder members while ensuring the works of these selfless women and men can be carried forth. For the countless ways your prayers and generosity advance this goal, we offer heartfelt thanks.

With gratitude,

Sister Stephanie Still, PBVM

Sister Stephanie Still, PBVM
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.

Fund Distributions

Distributions History

Since 1988, more than \$775 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
Direct Care Assistance*	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
	Year 29, 2016	281	19,240,258.57	109	5,759,741.49
	Subtotal	—	585,331,416.29	—	98,514,458.78
Other Assistance			76,462,832.09		14,874,964.54
	Total	—	\$661,794,248.38	—	\$113,389,423.32
Total Assistance Awarded					\$775,183,671.70

*Basic Grants, collection years 1-20.

Direct Care Assistance

The 2016 collection for the Retirement Fund for Religious enabled the distribution of \$25 million in Direct Care Assistance to 390 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	38	32.94	\$28,652.67
		Benedictine Society of Alabama	33	85.98	17,709.39
Arizona	Nogales	Minim Daughters of Mary Immaculate	13	81.43	19,839.67
	Phoenix	Canons Regular of the Order of the Holy Cross	47	6.98	21,618.09
	Sonoita	Santa Rita Abbey	11	60.82	11,869.34
	St. David	Benedictine Monks	4	98.69	2,240.14
	Tucson	Sisters of the Immaculate Heart of Mary	16	93.73	32,884.70
Arkansas	Jonesboro	Olivetian Benedictine Sisters	37	13.71	18,690.18
	Little Rock	Discalced Carmelite Nuns	15	72.84	15,194.56
	Subiaco	Benedictines of Subiaco Abbey	40	82.58	39,080.83
California	Alhambra	Carmel of St. Teresa	13	98.81	12,589.45
		Carmelite Sisters of the Most Sacred Heart	124	91.77	113,396.97
	Aptos	Order of St. Clare	5	79.99	7,554.92
	Belmont	Sisters of Notre Dame de Namur	93	43.87	117,327.27
	Big Sur	Camaldolese Monks, Order of St. Benedict	14	87.90	14,143.55
	Bonita	Sister Servants of the Blessed Sacrament	47	83.78	37,759.40
	Burlingame	Capuchin Franciscan Order	44	60.95	29,228.32
	Castro Valley	Conventual Franciscans	45	91.81	22,678.56
	Culver City	Religious Sisters of Charity	29	3.78	14,763.88
	Encino	Sisters of Social Service	69	78.61	92,546.73
	Garden Grove	Poor Clare Missionary Sisters	42	99.83	24,468.10
	Gardena	Lovers of the Holy Cross of Los Angeles	64	62.24	15,423.76
	Los Angeles	Franciscan Brothers	8	76.00	10,599.13
		Immaculate Heart Community	82	66.45	143,401.64
		Missionaries Guadalupanas of the Holy Spirit	44	85.02	49,686.63
		Monastery of the Angels	18	60.64	21,596.77
	Los Banos	Franciscan Hospitaller Sisters	17	85.11	21,868.67
	Millbrae	Holy Ghost Fathers of Ireland	50	93.61	87,783.89
	Northridge	Sisters of the Pious Schools	22	93.13	9,875.99
		Society Devoted to the Sacred Heart	44	44.40	17,828.93
Oakland	Franciscan Friars	161	80.68	188,709.28	
Oceanside	Prince of Peace Abbey	22	86.84	21,861.71	
Rancho Palos Verdes	Daughters of Mary and Joseph	37	26.06	41,672.94	

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	96.13	\$26,801.90
		Oblatas de Santa Marta	31	99.03	39,091.61
	Riverside	Society of the Divine Word	61	81.33	35,471.47
	San Diego	Carmelite Monastery of San Diego	14	80.26	16,666.47
	San Francisco	Salesian Society of Don Bosco	75	28.03	45,271.48
		Verbum Dei Missionary Fraternity	26	98.39	1,578.72
	Solana Beach	The Eudists—Congregation of Jesus and Mary	13	86.00	8,584.76
	Thousand Oaks	Sisters of Notre Dame	54	56.34	51,527.08
	Tustin	Sisters of the Company of Mary			42,073.41
	Valyermo	Benedictine Monks	19	86.65	13,731.64
	Vina	New Clairvaux Abbey	22	90.03	25,252.74
Whitethorn	Redwoods Monastery	10	83.15	9,705.38	
Colorado	Colorado Springs	Benet Hill Monastery	33	51.63	46,688.92
	Denver	Capuchin Franciscans	64	76.72	49,875.75
		Capuchin Poor Clares	7	96.76	3,116.96
		Redemptorists	173	42.15	122,778.04
Snowmass	St. Benedict's Monastery	16	33.25	11,390.58	
Connecticut	Baltic	Sisters of Charity of Our Lady, Mother of the Church	59	88.70	51,451.80
	Bethlehem	Benedictine Congregation	36	78.84	30,502.01
	Branford	Benedictines of Jesus Crucified	14	36.43	13,726.17
	East Haven	Sisters of Charity of Our Lady Mother of Mercy	7	29.85	7,316.99
	Hamden	Apostles of the Sacred Heart of Jesus	119	36.17	69,353.64
	Meriden	Franciscan Sisters of the Eucharist	79	39.67	43,018.06
	Middletown	Daughters of Our Lady of the Garden	12	89.81	8,545.50
	Putnam	Daughters of the Holy Spirit	68	27.22	73,561.31
	Stamford	Little Workers of the Sacred Heart of Jesus			25,265.47
	West Hartford	Sisters of St. Joseph	84	46.29	129,305.20
Delaware	Wilmington	Capuchin Poor Clare Nuns, Inc.	10	99.58	1,986.71
		Oblates of St. Francis de Sales	146	80.53	171,370.95
District of Columbia	Washington	Missionary Oblates of Mary Immaculate	257	22.88	174,174.24
		Piarist Fathers	52	98.49	34,327.41
		Religious of Mary Immaculate	15	90.22	13,677.18
		Servants of the Lord and the Virgin of Matara	123	99.42	4,423.25
		Society of Mary	90	32.41	88,334.59
		U.S. Province of the Religious of Jesus and Mary	76	9.19	44,193.96
Florida	Delray Beach	Christ the King Monastery	8	63.31	6,215.41
	Miami	Claretian Missionary Sisters	10	90.81	10,821.93
	Palm Harbor	Sisters of St. Clare	10	93.28	13,232.64

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	30	97.35	\$38,503.07
	Savannah	Carmelite Monastery	7	94.43	3,515.76
Hawaii	Kaneohe	Carmelite Monastery			4,329.96
Idaho	Cottonwood	Benedictine Sisters	41	52.49	51,764.47
	Jerome	Monastery of the Ascension	13	45.60	11,191.61
Illinois	Alton	Sisters of St. Francis of the Martyr St. George	105	100.00	37,374.42
	Arlington Heights	Sisters of the Living Word	57	42.12	59,993.65
	Aurora	Benedictines of Marmion Abbey	22	90.91	19,603.87
		Missionaries of the Sacred Heart	41	92.72	70,503.63
	Belleville	Poor Clare Monastery of Our Lady of Mercy			8,471.54
	Chicago	Augustinians	87	63.69	97,230.51
		Benedictine Sisters	38	22.06	30,714.07
		Congregation of the Resurrection	54	99.24	45,430.98
		Conventual Franciscans of St. Bonaventure Province	43	87.94	27,223.71
		Dominicans	148	67.89	128,545.94
	Joliet	Congregación de Hermanas Josefinas	30	69.73	42,898.73
		Sisters of St. Francis of Mary Immaculate	135	12.03	107,421.00
	Lacon	Daughters of St. Francis of Assisi	12	54.06	8,898.78
	Melrose Park	Missionary Sisters of St. Charles Borromeo	59	80.23	37,713.24
	Momence	Hospitaller Order of St. John of God	35	19.71	15,437.59
	Oak Park	Missionaries of St. Charles	71	60.57	38,784.97
	Park Ridge	Congregation of the Passion	55	65.50	75,724.45
	Peru	Benedictine Monks	15	87.58	16,204.91
		Springfield	Dominican Monastery of Mary the Queen	13	83.37
	Dominican Sisters		192	22.37	141,563.62
Wheaton	Institute of the Blessed Virgin Mary	57	54.65	91,305.98	
Indiana	Beech Grove	Benedictine Sisters	57	21.70	32,638.32
	Ferdinand	Sisters of St. Benedict	136	59.87	162,525.33
	Mount St. Francis	Conventual Franciscans, Province of Our Lady of Consolation	82	81.98	102,688.88
	Notre Dame	Brothers of Holy Cross	95	5.53	58,457.35
		Congregation of Holy Cross, U.S. Province of Priests and Brothers	301	37.51	187,454.48
	Oldenburg	Sisters of St. Francis of the Third Order	197	62.14	291,878.88
	St. Mary-of-the-Woods	Sisters of Providence	285	53.77	436,181.64
	St. Meinrad	Benedictine Monks	86	76.75	80,450.87
Terre Haute	Discalced Carmelite Monastery	16	20.17	3,617.02	
Iowa	Davenport	Congregation of the Humility of Mary	84	6.76	61,630.13
	Eldridge	Queen of Heaven Carmelite Monastery	8	57.42	7,982.03

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount	
Kansas	Atchison	Benedictine Sisters	120	32.36	\$133,125.85	
		St. Benedict's Abbey	42	71.50	32,717.95	
	Colwich	Sisters of the Immaculate Heart	27	93.70	1,000.00	
	Kansas City	Servants of Mary Ministers to the Sick	90	65.90	56,263.09	
Kentucky	Louisville	Discalced Carmelite Monastery	6	45.71	5,245.16	
	Owensboro	Home Mission Sisters of America			4,395.26	
		Sisters of the Lamb of God	5	94.02	6,993.06	
Villa Hills	St. Walburg Monastery	47	43.85	35,972.27		
Louisiana	Abita Springs	Sisters of St. Benedict	3	77.80	4,362.51	
	Covington	Society of St. Teresa of Jesus	27	28.34	21,440.94	
	Lacombe	Congregation of Our Lady of Mt. Carmel	69	35.67	56,357.79	
	Metairie	Southern Dominican Province of St. Martin de Porres	99	95.20	82,212.83	
		New Orleans	Daughters of Our Lady of the Holy Rosary	70	77.40	25,517.00
			Franciscan Poor Clares	9	48.32	8,782.61
		Sisters of the Holy Family	87	64.46	156,327.48	
	Shreveport	Sisters of Our Lady of Sorrow	24	83.90	13,669.23	
	St. Benedict	Benedictine Monks	30	24.77	13,501.22	
	Maine	Alfred	Brothers of Christian Instruction	16	34.31	16,786.08
Old Orchard Beach		Sisters of Our Lady of the Holy Rosary	8	78.61	6,110.66	
Waterville		Servants of the Blessed Sacrament			7,213.26	
Maryland	Baltimore	Carmelite Sisters of Baltimore	16	35.40	12,787.45	
		Institute of Mission Helpers of Baltimore City, Inc.	47	70.07	73,260.29	
		Oblate Sisters of Providence	61	86.33	109,331.81	
		Order of the Most Holy Trinity and of the Captives	29	91.80	30,299.99	
		School Sisters of Notre Dame	454	6.62	306,937.58	
		Sisters of Notre Dame de Namur	42	29.50	35,726.49	
		St. Joseph's Society of the Sacred Heart	81	81.54	83,369.01	
	Childs	Oblate Sisters of St. Francis de Sales	14	58.85	11,923.18	
	Ellicott City	Franciscan Friars	208	28.07	105,971.90	
	Lutherville	Benedictine Sisters of Baltimore	15	47.12	18,187.88	
	Potomac	Little Sisters of the Holy Family	12	94.97	4,249.48	
	Salisbury	Little Sisters of Jesus and Mary	7	90.95	9,602.18	
	Silver Spring	Missionary Servants of the Most Holy Trinity	121	39.00	59,217.12	

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount	
Massachusetts	Boston	Brotherhood of Hope	20	57.63	\$2,207.36	
		Daughters of St. Paul	142	99.42	116,187.11	
		Oblates of the Virgin Mary	48	35.61	16,065.10	
	Brighton	Assumptionists	27	59.85	35,880.95	
		Franciscan Missionary Sisters for Africa	5	96.79	6,493.20	
	Fairhaven	Congregation of the Sacred Hearts	43	94.34	54,998.39	
	Hingham	Glastonbury Abbey	9	92.84	9,352.40	
	Holyoke	Franciscan Missionary Sisters of Assisi	14	95.87	6,611.47	
		Sisters of St. Joseph of Springfield	206	63.73	319,452.12	
	Jamaica Plain	Franciscan Monastery of St. Clare			4,623.30	
	Marlborough	Sisters of St. Anne	74	1.79	17,801.33	
	Methuen	Sisters of the Presentation of Mary, Inc.	153	41.64	195,284.44	
	Milton	Holy Union Sisters	78	7.38	38,195.96	
	Newton	Missionary Franciscan Sisters of the Immaculate Conception	97	31.46	49,350.76	
	Petersham	St. Mary's Monastery	6	86.31	2,022.08	
		St. Scholastica Priory, Benedictine Nuns	10	83.79	5,375.16	
	Spencer	St. Joseph's Abbey	52	98.84	68,590.04	
	Still River	Slaves of the Immaculate Heart of Mary			11,487.91	
		Saint Benedict Abbey			1,993.01	
	Tyringham	Sisters of the Visitation	16	20.88	6,640.75	
	Waltham	Missionary Sisters of the Society of Mary	67	46.36	76,774.57	
	Wellesley	Sisters of Charity of St. Vincent de Paul—Retirement Community	67	32.93	48,270.40	
	Wellesley Hills	Sisters of Charity of St. Vincent de Paul	56	62.42	42,957.02	
	Worcester	Religious Venerini Sisters	18	79.00	34,412.55	
	Wrentham	Mount St. Mary's Abbey	43	64.98	42,216.97	
		Sisters of St. Chretienne	39	5.03	11,038.25	
	Michigan	Belmont	Consolata Missionary Sisters	23	87.14	27,515.08
		Detroit	Province of St. Joseph of the Capuchin Order	163	12.30	84,531.50
			Sisters, Home Visitors of Mary	10	37.55	11,096.58
		Farmington Hills	Monastery of the Blessed Sacrament	30	47.26	23,300.55
Grand Rapids		Grand Rapids Dominicans			118,221.20	
Lansing		Benedictine Sisters	1	96.38	2,825.01	
Marquette		Sisters of St. Paul of Chartres	12	94.96	9,223.55	
Monroe		Sisters, Servants of the Immaculate Heart of Mary	325	24.11	333,986.31	
Ortonville		Dominican Sisters of Mt. Tabor	7	54.09	4,429.96	
Saginaw		Servants of Jesus	13	29.35	11,847.56	
		Sisters of St. Clare	4	14.47	3,140.61	
Wyandotte		Pallottine Fathers	11	86.69	10,637.25	
Minnesota		Collegeville	St. John's Abbey	127	66.11	137,178.43
Mississippi	Bay St. Louis	Divine Word Missionaries	63	97.27	50,352.61	

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount	
Missouri	Ava	Nazareth Hermitage			\$8,132.15	
	Carthage	Congregation of the Mother Coredemptrix	128	93.15	64,471.65	
	Conception	Benedictines of Conception Abbey	55	80.90	61,913.39	
	Dittmer	Servants of the Paraclete	18	82.14	28,089.61	
	High Ridge		Daughters of Our Mother of Peace	17	99.43	19,617.26
			Sons of Our Mother of Peace	4	98.31	4,507.87
	Independence	Sisters of St. Francis of Holy Eucharist	13	58.02	11,055.43	
	Liberty	Benedictine Sisters	4	100.00	1,993.30	
	Liguori	Order of the Most Holy Redeemer	18	79.85	23,437.27	
	Savannah	Sisters of St. Francis	6	86.21	12,673.66	
	St. Louis		Franciscan Friars	211	61.45	245,274.67
			Franciscan Sisters of Our Lady of Perpetual Help	83	45.40	90,528.74
			Missionaries of the Holy Family	15	45.42	16,331.33
			School Sisters of Notre Dame	958	31.86	1,063,746.18
			Sisters of the Good Shepherd	129	15.17	93,205.53
Montana	Great Falls	Poor Clares of Montana	7	98.13	7,228.24	
Nebraska	Elkhorn	Mount Michael Benedictine Abbey	21	41.16	13,166.98	
			32	59.38	1,000.00	
	Lincoln	Sisters of Mary Queen of Mercy	11	99.64	3,768.44	
			69	54.03	80,485.32	
			589	2.05	340,486.93	
	St. Columbans	Missionary Society of St. Columban	70	92.45	108,254.02	
New Hampshire	Manchester	Sisters of Holy Cross	94	94.39	210,929.85	
New Jersey	Belvidere	Augustinian Recollect Sisters	8	100.00	6,291.36	
	Caldwell	Sisters of St. Dominic	117	49.08	172,430.43	
	Cherry Hill	Franciscan Missionary Sisters of the Infant Jesus	12	93.66	11,350.08	
			64	96.20	61,407.99	
	Chesterfield	Monastery of St. Clare	12	43.00	10,253.66	
	Convent Station	Sisters of Charity of St. Elizabeth	271	63.69	477,754.24	
	Haledon	Daughters of Mary Help of Christians	91	84.88	83,754.15	
	Morristown	Monastery of Discalced Carmelite Nuns			4,886.01	
	Newfield	Daughters of Our Lady of Mercy	29	50.05	29,987.81	
	Paterson	Missionary Sisters of Immaculate Conception	27	17.29	19,754.89	
	Summit	Dominican Nuns	19	86.52	12,753.46	
	Tenafly	Society of African Missions	15	27.05	7,448.65	
	Union City	Order of Friars Minor Capuchin			24,070.93	
	Wayne	Xaverian Missionary Fathers	14	59.11	12,723.85	
	West Orange	Augustinian Recollects	39	67.90	30,120.86	
New Mexico	Blanco	Monastery of Our Lady of the Desert	10	99.63	6,584.02	
New York	Amityville	Dominican Sisters	386	17.98	342,467.89	
	Astoria	Sisters of the Good Shepherd	44	26.75	38,822.62	
	Beacon	Redemptoristine Nuns	7	4.00	1,602.47	
	Blauvelt	Sisters of St. Dominic	117	26.95	83,381.72	
	Brentwood	Sisters of St. Joseph	483	5.18	239,022.05	

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount	
New York, continued	Bronx	Dominican Nuns of Perpetual Adoration	10	64.73	\$8,126.21	
		Franciscan Missionaries of Mary	85	83.02	152,396.31	
		Sisters of St. John the Baptist	74	35.49	47,005.49	
	Brooklyn	Sisters of the Visitation of Brooklyn	14	64.53	19,596.68	
	Buffalo	Dominican Nuns				16,936.37
		Sisters of Mercy of the Americas	375	6.14	219,560.49	
		Sisters of Social Service of Buffalo	13	51.35	10,679.14	
		Sisters of St. Mary of Namur	67	63.75	93,130.26	
	City Island	Medical Missionaries of Mary	27	40.49	25,278.86	
	Clarence	Sisters of St. Joseph	67	35.50	89,529.92	
	Forest Hills	Marist Brothers	139	2.60	51,030.50	
	Garrison	Franciscan Friars of the Atonement	68	5.51	31,101.98	
		Franciscan Sisters of the Atonement	98	46.35	116,739.05	
	Hopewell Junction	Sisters Oblates to the Blessed Trinity	38	90.06	35,754.88	
	Huntington	Missionary Sisters of St. Benedict	32	96.67	16,747.01	
	Islip	Daughters of Wisdom	80	30.80	87,227.22	
	Jamaica	Ursuline Sisters of Tildonk	42	62.82	68,807.76	
	Latham	Sisters of St. Joseph of Carondelet			125,302.14	
	Lewiston	Sisters of the Sacred Heart of Jesus	15	93.28	13,171.47	
	Middletown	Carmelite Friars	76	50.43	30,349.22	
	Monroe	Parish Visitors of Mary Immaculate			37,128.01	
	New Rochelle	Christian Brothers			180,449.90	
		Salesian Society, Inc.	120	83.47	118,097.49	
	New Windsor	Sisters of the Presentation of the Blessed Virgin Mary	107	6.74	51,403.23	
	New York	Dominican Province of St. Joseph	270	77.60	178,840.88	
		Little Sisters of the Assumption	15	32.03	14,618.59	
		Missionary Sisters of the Sacred Heart of Jesus	69	17.59	54,749.87	
		Paulist Fathers	108	25.15	67,250.31	
	Nyack	Sisters of Christian Doctrine	16	27.23	15,525.44	
	Peekskill	Franciscan Missionary Sisters of the Sacred Heart	23	62.00	18,332.73	
	Piffard	Genesee Abbey	32	75.57	33,597.54	
	Rego Park	Sisters of Charity-Halifax	60	60.26	82,371.09	
	Rhinebeck	Society of St. Ursula	23	40.83	19,729.55	
	Rochester	Sisters of St. Joseph	197	52.99	260,438.13	
	Rye Brook	Congregation of the Passion	103	9.83	63,211.39	
	Silver Creek	Missionary Sisters of St. Columban	16	95.77	29,524.81	
	Sloatsburg	Sisters Servants of Mary Immaculate	25	53.49	30,146.26	
	Sparkill	Dominican Convent of Our Lady of the Rosary	259	37.76	231,902.68	
	Staten Island	Sister Disciples of the Divine Master	35	91.55	48,888.89	
		Society of St. Paul	27	91.99	37,223.28	
	Suffern	Sisters of Life	106	96.74	7,307.87	
	Syracuse	Sisters of St. Francis	395	46.52	301,637.52	
	White Plains	Province of St. Mary of the Capuchin Order	139	56.23	109,989.57	
Sisters of the Divine Compassion		76	25.05	45,371.62		
Windsor	Benedictine Sisters	4	92.51	7,870.10		
Youngstown	Clerics Regular of St. Paul	14	80.48	12,467.02		

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
North Dakota	Richardton	Assumption Abbey	40	35.68	\$26,920.62
Ohio	Canfield	Ursuline Sisters	43	30.27	42,334.50
	Canton	Poor Clare Nuns of Perpetual Adoration	10	94.02	5,582.72
	Chardon	Sisters of Notre Dame	285	7.86	149,232.91
	Cincinnati	Comboni Missionaries of the Heart of Jesus	32	26.85	16,821.88
		Monastery of St. Clare	8	81.66	5,446.40
	Cleveland	St. Andrew Abbey	26	76.37	22,028.41
	Euclid	Sisters of the Most Holy Trinity	17	97.46	17,811.26
	Garfield Heights	Sisters of the Holy Spirit	4	97.49	3,710.35
	Highland Heights	Congregation of the Blessed Sacrament	37	47.20	43,299.41
	Hubbard	Oblate Sisters of the Sacred Heart of Jesus	16	57.21	10,702.86
	Louisville	Sisters of St. Joseph of St. Mark	8	14.57	5,642.83
	North Jackson	Antonine Sisters	6	91.12	3,711.20
	Pepper Pike	Ursuline Sisters of Cleveland	147	3.73	75,047.45
	Tiffin	Sisters of the Third Order Regular of St. Francis of Penance and of Charity	86	62.69	128,170.91
	Toledo	Oblates of St. Francis de Sales	53	1.11	17,573.42
		Sisters of Notre Dame	178	23.06	133,928.37
		Visitation Monastery	18	74.81	12,870.04
	Toronto	Franciscan Sisters, Third Order Regular	31	92.79	3,814.24
Oklahoma	Shawnee	Benedictine Fathers	23	85.24	28,096.70
Oregon	Banks	Missionaries of the Holy Spirit	43	73.95	16,304.72
	Beaverton	Franciscan Missionary Sisters of Our Lady of Sorrows	33	63.93	26,999.64
	Carlton	Guadalupe Abbey	25	81.59	36,880.19
	Mt. Angel	Benedictine Sisters of Mt. Angel	32	53.59	47,560.80
	Portland	Society of Jesus	175	49.20	137,279.84
	St. Benedict	Benedictines of Mount Angel Abbey	49	77.18	27,697.51

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
Pennsylvania	Allison Park	Sisters of Divine Providence	194	44.67	\$217,527.14
	Baden	Sisters of St. Joseph	165	48.51	209,763.05
	Bakerstown	Benedictine Sisters	45	68.94	72,718.50
	Bensalem	Sisters of the Blessed Sacrament	99	32.77	94,654.22
	Erie	Benedictine Sisters	96	70.66	157,594.84
		Sisters of St. Joseph of Northwestern Pennsylvania	100	41.92	142,591.75
	Gallitzin	Carmelite Community of the Word	14	42.56	9,285.87
	Greensburg	Sisters of Charity of Seton Hill	164	35.92	209,636.45
		Sisters of St. Benedict	8	74.74	8,538.70
	Haverford	Handmaids of the Sacred Heart of Jesus	33	68.86	35,610.49
	Hollidaysburg	Third Order Regular of St. Francis	31	49.39	30,437.74
	Jenkintown	Sisters of the Order of St. Basil the Great	31	72.48	56,413.25
	Latrobe	Carmel of the Assumption	11	85.25	14,225.57
	Loretto	Third Order Regular of St. Francis	110	71.46	97,242.35
	Meadowbrook	Sisters of the Holy Redeemer	18	34.65	6,704.09
	Merion	Sisters of Mercy of the Americas	820	36.40	817,578.53
	New Ringgold	Cistercian Fathers			5,813.80
	Paoli	Canons Regular of Premontre			24,314.96
	Philadelphia	Missionary Servants of the Most Blessed Trinity	104	18.88	74,600.74
		Order of Our Lady of Mercy	21	85.51	11,329.84
	Pittsburgh	Capuchin Franciscan Province of St. Augustine	123	33.10	57,584.39
		School Sisters of the Third Order Regular of St. Francis	76	48.09	93,781.07
		Sisters of St. Francis of the Providence of God	27	30.29	29,107.60
	Reading	Bernardine Franciscan Sisters	183	39.13	197,996.30
		Missionary Sisters of the Most Sacred Heart	51	72.78	65,741.48
		Missionary Sisters of the Precious Blood	17	76.81	16,392.12
	Scranton	Servants of the Immaculate Heart of Mary	355	29.00	281,790.82
Uniontown	Sisters of the Order of St. Basil the Great	46	81.30	98,552.88	
Villanova	Order of St. Augustine	154	48.97	113,895.25	
Puerto Rico	Humacao	Benedictine Sisters	10	89.05	11,832.76
Rhode Island	Barrington	Monastery of Discalced Carmelites	12	65.03	15,266.72
	Bristol	Sisters of St. Dorothy	28	24.39	18,809.47
	Cumberland	Sisters of Mercy of the Americas	543	30.42	651,016.11
	Middletown	Sisters of St. Joseph of Cluny	16	11.22	11,644.25
	North Kingstown	Sisters of the Cross and Passion	29	26.43	24,176.41
	Pascoag	Sacred Heart Brothers	56	52.70	65,648.14

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
South Carolina	Travelers Rest	Monastery of St. Clare	13	90.82	\$15,481.47
Tennessee	Nashville	Dominican Sisters of St. Cecilia	304	89.37	60,423.42
Texas	Amarillo	Capuchin Poor Clares of the Blessed Sacrament			13,408.86
		Franciscan Sisters of Mary Immaculate	18	98.54	12,460.43
	Austin	Franciscanas Hijas de la Misericordia	6	73.12	5,648.46
	Canyon	St. Benedict's Monastery	5	82.58	6,865.42
	Corpus Christi	Sisters of the Society of Our Lady of the Most Holy Trinity	77	99.75	30,592.57
		Society of Our Lady of the Most Holy Trinity	93	89.99	44,060.64
	El Paso	Good Shepherd Convent	11	93.70	17,829.80
		Servants of the Sacred Heart of Jesus and the Poor	16	91.31	11,869.06
		Sisters of Perpetual Adoration	8	97.60	9,698.67
	Fort Worth	Sisters of St. Mary of Namur	37	42.09	41,733.10
	Houston	Dominican Sisters of Mary Immaculate Province	98	95.58	18,247.73
		Missionary Carmelites of St. Teresa	57	43.01	48,687.54
	Kingsville	Missionary Daughters of the Most Pure Virgin Mary	21	97.61	21,354.89
	New Caney	Discalced Carmelite Nuns	8	7.05	2,886.74
	Panhandle	School Sisters of the Third Order of St. Francis			16,235.28
	Prayer Town	Disciples of the Lord Jesus Christ	35	96.40	13,294.90
	San Antonio	Congregation of Divine Providence	138	26.90	149,610.96
		Cordi-Marian Sisters	28	90.06	39,395.25
		Discalced Carmelite Friars	18	82.15	14,589.47
		Eucharistic Franciscan Missionary Sisters	9	99.72	14,088.58
		Hermanas Catequistas Guadalupanas	13	98.31	18,072.23
		Institute of the Daughters of Mary	94	95.91	139,985.58
		Misioneras de Nuestra Sra del Perpetuo Socorro	19	97.53	21,398.15
		Missionaries of the Sacred Heart	11	20.01	6,464.69
		Missionary Catechists of Divine Providence	32	49.67	35,474.28
		Sisters of Charity of the Incarnate Word	145	55.27	210,113.00
		Sisters of Perpetual Adoration	8	100.00	9,862.69
		Sisters of the Sacred Heart of Jesus	32	39.20	32,822.89
	Victoria	Missionary Catechists of the Sacred Hearts of Jesus and Mary	35	79.89	45,908.60
		Sisters of the Incarnate Word and Blessed Sacrament	68	12.09	39,777.30
	Wolfforth	St. Francis Mission Community	16	94.26	19,169.45

Fund Distributions
Direct Care Assistance, continued

State	City	Institute	Number of Members	Percentage of Retirement Not Funded (weighted average)	Distribution Amount
Utah	Salt Lake City	Discalced Carmelite Nuns	12	82.45	\$9,017.50
Vermont	Westfield	Benedictine Nuns of the Congregation of Solesmes	12	91.52	11,955.33
Virgin Islands	Frederiksted, St. Croix	Missionary Sisters of the Immaculate Heart of Mary	21	94.16	14,515.82
Virginia	Barhamsville	Monastery of Poor Clares	22	94.29	12,539.84
	Berryville	Holy Cross Abbey	12	35.69	8,515.76
	Crozet	Our Lady of the Angels Monastery	14	91.72	14,205.27
	Linden	Dominican Nuns	12	94.96	3,164.39
	Richmond	Mary Mother of the Church Abbey	9	71.47	6,299.73
Washington	Lacey	Sisters of St. Benedict	16	61.16	15,351.81
	Olympia	Holy Theophany Monastery	4	100.00	4,837.91
	Spokane	Sisters of Mary, Mother of the Church	11	95.98	2,036.55
	Tacoma	Dominican Sisters	49	22.40	50,955.97
Wisconsin	Beloit	Auxiliaries of the Blessed Sacrament	3	82.09	5,182.13
	Fond du Lac	Sisters of St. Agnes	209	18.51	174,041.12
	Franklin	Franciscan Friars Assumption, Blessed Virgin Mary Province, Inc.	105	60.99	130,775.00
	Green Bay	Sisters of St. Francis of the Holy Cross	57	1.30	30,839.78
	Hudson	Carmelite Nuns of the Diocese of Superior	6	83.26	4,428.88
	Milwaukee	School Sisters of St. Francis	402	27.18	479,829.71
		Sisters of the Divine Savior	63	12.28	47,124.75
		Society of the Divine Savior	84	43.70	65,543.66
	Prairie du Sac	Cistercian Nuns	20	92.98	10,423.09
	Sinsinawa	Sinsinawa Dominican Sisters	432	23.42	426,407.81
St. Francis	Sisters of St. Francis of Assisi	188	25.97	187,354.52	
Stevens Point	Sisters of St. Joseph, Third Order of St. Francis	222	64.69	354,894.03	
Total Direct Care Assistance		390 Distributions			\$25,000,000.06

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 retiredreligious.org to view a PDF listing of these institutes.

Fund Distributions

Planning and Implementation Assistance

Planning and Implementation Assistance is a comprehensive program to help religious communities increase their ability to care for senior members, now and in the future. Over a period of 18 to 24 months, a core planning team from each participating congregation works with two NRRO-trained consultants to identify retirement-funding challenges and develop strategies to address the deficits. Communities may request funds for both the planning and the implementation phases. The following congregations entered the program in 2016. Some have completed the process, and others continue to work with NRRO staff and consultants to refine their plans. Funds allocated but not disbursed in 2016 will be available for distribution in 2017.

Benedictine Sisters	Chicago, IL
Benedictine Sisters	Erie, PA
Canons Regular of Premontre	Paoli, PA
Daughters of Mary Help of Christians	Haledon, NJ
Franciscan Missionary Sisters of Our Lady of Sorrows	Beaverton, OR
Lovers of the Holy Cross of Los Angeles	Gardena, CA
Salesian Society, Inc.	New Rochelle, NY
Sisters of Charity of the Incarnate Word	San Antonio, TX
Sisters of the Order of St. Basil the Great	Jenkintown, PA
Sisters of the Order of St. Basil the Great	Uniontown, PA
Sisters of the Presentation of Mary, Inc.	Methuen, MA
Total religious institutes entering Planning and Implementation Assistance in 2016	11

In 2016, \$1,116,513.88 was distributed to 18 institutes in the form of Planning Assistance. Awards ranged from \$12,000.00 to \$285,825.00.*

In 2016, \$3,217,863.00 was distributed to six institutes in the form of Implementation Assistance. Assistance ranged from \$74,500.00 to \$1,000,000.00.*

Management and Continuing Education Assistance

In 2016, \$167,460.35 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 various 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.

Total participating institutes	47
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*Totals include distributions to some religious communities that entered Planning and Implementation Assistance in previous years and received funding in 2016.

Acknowledgments

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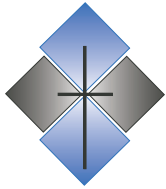
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