



The Association of Treasurers
of Religious Institutes
Presents the 35th Annual Conference

Tides of Change



September 23-26, 2022

Delta Hotels Beausejour

750 Main Street Moncton, New Brunswick E1C 1E6

Hotel call-in Registration number: 1-506-854-4344
(ask for registrations under ATRI Conference)

Web Registration

Book your reservation at [Click here](#)

Dear Registrant:

Welcome to ATRI's 35th Annual Conference: This year we will be exploring the theme—

“Tides of Change”. This theme draws us to look at the challenges of the changes in religious life. Rev. David Couturier, OFM, Cap. will ground our conference by highlighting how in our various roles we need to be open and aware of what is happening around us in order to continue our ministry as people of faith and hope.

We will also offer practical workshops to assist and challenge us in our various ministries as treasurers, leadership and financial people in our religious communities.

This year the following will be included in your registration fee thanks to the generosity of the many sponsors of our conference:

- 1 Substantial Social (**this will be on Friday night so please eat a “Lite” supper**)
- 3 Breakfasts
- 4 Nutrition Breaks
- 2 Lunches
- Banquet & Entertainment
- Box lunches available on Monday for those who request them (see registration form)
- General Conference Costs

We hope that you will enjoy the Conference and the uniqueness of “the tidal bore” located near the Delta Hotels Beausejour, in Moncton, New Brunswick.

We look forward to seeing you.

Sincerely,

The ATRI Conference Planning Committee

Conference Registration Fees:

Before August 8, 2022:	\$ 350.00 (for the 1st person)
	\$ 300.00 (for the 2nd person)
	\$ 275.00 (for any additional people)
After August 8, 2022:	\$ 375.00
Non-Member:	\$ 400.00

EARLY BIRD DRAW!!!!

EARLY BIRD SPECIAL!!! “Early Bird Draw – Prize of a one night stay for two (2) with breakfast included” .
If you register before **July 8, 2022** your name will be entered in the draw.

So book your hotel room early!!



Fr. David B. Couturier, OFM. Cap. is Director of the Franciscan Institute and Associate Professor of Theology and Franciscan Studies and Director of University Planning at St. Bonaventure University in Olean, New York. He is a trained psychotherapist and mediator. Having studied at the Institute of Psychology in Rome, the William Alinson White Institute for Psychiatry and Psychology in New York and the Graduate Theological Foundation in Oklahoma, he has a doctorate in counseling and a doctorate in psychology with a specialty in organizational studies. He is the Director of the Padua Program, which teaches mission-based leadership to leaders of Franciscan institutions. He has published over 60 articles and authored/edited several books including *The Fraternal Economy: A Pastoral Psychology of Franciscan Economics* (2007) and *Franciscans and their Finances: Economics in a Disenchanted World* (Franciscan Institute Publications, 2015), *The Voice of Victims*, *The Voice of the Crucified* (Franciscan Institute Publications, 2020).

Presentation Title:

Changing Tides and Lifting Hope: Mission Based Leadership in the Age of Accelerations

Presentation Description:

Thomas Friedman has indicated that we live in an “age of accelerations,” where the volume and velocity of change across all fields is accelerating often beyond our immediate capacity to assimilate and internalize. This is true in the for-profit and not-for-profit world. The three sessions will look at mission-based leadership of Church institutions to discern what are the challenges and what are the opportunities and resources for effective change. We will use the writings of Pope Francis (in his encyclicals and addresses to business men and women), as well as the latest in organizational and leadership studies to discuss mission-based leadership, the elements of a lay “institutional vocation,” as well as mission and ethics as a partnership between mission and finance officers.



WORKSHOP PRESENTERS

SCOTT BECK is CEO of the fast-growing cyber security & IT Services firm BeckTek. He's a two-time international best-selling author and award-winning speaker, including appearances at NASDAQ and Harvard Club of Boston. Co-star of the Amazon Prime documentary "Cyber Crime", Scott is a frequent celebrity guest expert with appearances on NBC, ABC, Fox and Global.

GUILLAUME BROUILLETTE, CFA – is a registered portfolio manager at Jarislowsky Fraser dedicated to managing and developing relationships with the institutional clientele. Guillaume manages portfolios and client relationships for pension funds, foundations, endowments, financial institutions, unions, Indigenous groups and religious institutes. Guillaume is based out of the Montreal office and covers the province of Quebec and Atlantic Canada. Guillaume has more than ten years of experience in the financial sector. Prior to joining Jarislowsky Fraser in 2017, he worked in business development at Fidelity Investments and for the Capital Markets division of RBC. Guillaume earned a bachelor's degree in finance from HEC Montreal and a master's degree in finance from Queen's University. He is also a CFA Charterholder. Guillaume is involved in the community and supports numerous non-profit organizations.

TERRY CARTER is the Managing Partner of Carters Professional Corporation, Mr. Carter practices in the area of charity and not-for-profit law, and is counsel to Fasken on charitable matters. Mr. Carter is a co-author of Corporate and Practice Manual for Charitable and Not-for-Profit Corporations (Thomson Reuters), a co-editor of Charities Legislation and Commentary (LexisNexis, 2021), and co-author of Branding and Copyright for Charities and Non-Profit Organizations (2019 LexisNexis). He is recognized as a leading expert by Lexpert, The Best Lawyers in Canada and Chambers and Partners. Mr. Carter is a past member of CRA Advisory Committee on the Charitable Sector, and is a Past Chair of the Canadian Bar Association and Ontario Bar Association Charities and Not-for-Profit Law Sections.

JESSE CHRUMKA is a senior investment consultant who assists pension funds, foundations and other institutional investors, as well as private wealth clients, in establishing their investment strategy and selecting and monitoring their investment managers. Jesse is a member of NB's Private Equity and Sustainable Investing research groups. Jesse has been working in investment and risk consulting for over a decade, including a number of years at a large global consulting firm. He also spent time in the advisory practice of a "big four" accounting firm, carrying out mandates with Canada's largest pension funds. Jesse graduated from Concordia University with a Bachelor of Science (Actuarial Mathematics, Minor in Finance) and is a CFA Charterholder, a Fellow of the Society of Actuaries (FSA), a Fellow of the Canadian Institute of Actuaries (FCIA), and a Chartered Enterprise Risk Analyst (CERA).

KAREN COOPER practices charity and not-for-profit law with an emphasis on corporate and tax issues with Drache Aptowitzer LLP. Ms. Cooper was called to the Ontario Bar in 1995 and became counsel for the Department of Justice in tax litigation. In addition to her considerable legal experience, Ms. Cooper was a sessional lecturer at Carleton University School of Business teaching Business Law, and is currently a part-time professor at the University of Ottawa Faculty of Common Law. Ms. Cooper also served as a Director and Chair of many non-profit boards, including presently as Chair of the Kemptville Campus Education and Community Centre and Governance Chair of the Duke of Edinburgh's International Award – Canada.

WORKSHOP PRESENTERS continued

BETH JOHNSON —Before Beth joined CHSO and CCLC in October 2020, she was the Executive Director of Mission Integration, Volunteer and Visitor Services at Unity Health Toronto, where she led strategic initiatives that ensured faithfulness to its Catholic identity, mission and values. Prior to her role in mission leadership, Beth was the Chief Communications Officer at Providence Healthcare, Toronto, at the time of its integration with St. Joseph's Health Centre and St. Michael's Hospital into Unity Health in 2017. At Providence, Beth promoted a values-based culture, uniting staff around the organization's mission, vision, and heritage. Beth worked in communications and public relations for 10 years in the private sector before transitioning to health care in 2002. Beth has a B.A. in History and French from the University of Toronto, a certificate in Public Relations from Humber College, and is pursuing a Diploma in Catholic Bioethics from St. Paul University.

NUALA KENNY, SC was born in New York and entered the Sisters of Charity of Halifax in 1962. She received her B.A., Magna Cum Laude, from Mount Saint Vincent University, an M.D. from Dalhousie University, Halifax, Nova Scotia in 1967. 1972-1975 she did postgraduate training in pediatrics at Dalhousie and Tufts-New England Medical Centre, Boston, Massachusetts, during which she held a Killam Scholarship. In 1975, she became a Fellow of the Royal College of Physician and Surgeons of Canada and in 1976 was certified by the American Board of Pediatrics. In 1993 she completed a Royal College Fellowship in Ethics at the Kennedy Institute of Ethics at Georgetown University. Doctor Kenny had a distinguished career in clinical care of seriously ill, dying and abused children and at Dalhousie, the Hospital for Sick Children and the University of Toronto and Queen's University, Kingston, Ontario. She returned to Dalhousie as Professor and Head of the Department of Pediatrics and Chief of Pediatrics at the Izaak Walton Killam Hospital in 1988. In 1995, she became the founding Chair of the Department of Bioethics of Dalhousie Faculty of Medicine. She is currently Professor Emeritus at Dalhousie University. In 1999, Dr. Kenny was seconded as Deputy Minister of Health for the Province of Nova Scotia. From 2009 to 2014 she served as the Ethics and Health Policy Advisor to the Catholic Health Alliance of Canada and has been an advisor to the Canadian Conference of Catholic Bishops. She is Past President of the Canadian Paediatric Society and the Canadian Bioethics Society. She has received seven Honorary Doctorates for her work in child health, medical education and health policy. In 1999 was appointed an Officer of the Order of Canada. Her ongoing research interests include the healing and prevention of clergy sexual abuse, end of life care, aging ethics, pandemic ethics and the renewal of public health.

BEVERLEY MUSGRAVE has retired as a professor at Fordham University, New York. Presently she is a Psychoanalytic therapist, completing thirty years in the field. She also offers Spiritual Direction in Halifax.

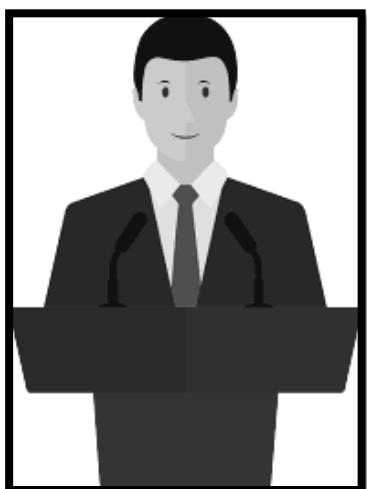
WORKSHOP PRESENTERS continued

JOHN RUETZ has held a variety of senior leadership positions which have taken him on a journey across the healthcare continuum. These various roles have focused on implementing strategy and leading major change initiatives. John is currently President & CEO of the Catholic Health Alliance of Canada (CHAC), which brings together 14 sponsor/owners of 129 health organizations with Catholic identity in Canada. He also serves as a strategic advisor to his former organization, Catholic Health Sponsors of Ontario. John holds an Honours Bachelor of Economics from Wilfrid Laurier University, and a Master of Health Sciences from the University of Toronto. He is a Certified Public Accountant, a Fellow of the Canadian College of Health Leaders, and a Fellow of the Executive Training for Research Application program through the Canadian Health Services Research Foundation.

JOANNE YELLE-WEATHERALL & SOPHIE ALLARD

Joanne Yelle Weatherall In September 2018, Joanne became the Executive Director of Canadian Religious Stewardship. She is a fluently bilingual senior leader with over 30 years' experience as a trusted advisor to management, elected officials and board directors. Joanne is recognized for her collaborative approach and her long track record of innovation in finding solutions to complex problems while creating productive relationships. She has worked in all levels of government, in university research and in catholic health care where she gained expertise in key areas including strategic and legacy planning, governance, long-term care, emergency medical services, primary and palliative care, human resource management, public relations, advocacy, and communications. Joanne says: "I recognize that my work with CRS is an answer to my prayers. I am grateful every day to be able to use my God given gifts and to share precious moments with the Religious I meet. I am fascinated and touched by individual stories of service and love that the sisters, brothers and priests share with me." In her spare time Joanne enjoys the peace and beauty of nature at the cottage in the Ottawa Valley, kayaking, fishing and golfing with her husband of 35 years and her three sons.

Sophie Allard is a member of the Institutional Markets team at Fiera Capital, where she is responsible for client servicing for charitable and religious organizations. Sophie has more than 8 years of industry experience and has been with Fiera Capital since she graduated college and occupied various roles within the firm. Sophie graduated from UQAM University with a Bachelor of Sciences (BSc) in actuarial mathematics. She later obtained the Chartered Financial Analyst (CFA) designation.



WORKSHOPS

1. “CYBERCRIME - NO VICTIM IS TOO SMALL”—SCOTT BECK

This workshop is an education session explaining: What CyberCrime is, Why it's so widespread, Who is involved, How they are doing it and Steps on how to avoid becoming the next victim.

2. “LIVING OUR LIFE STORY: THE EMINENT JOURNEY TO THE CENTER”—BEVERLY MUSGRAVE

Where we stand determines what we see. At this time in our life we are often navigating uncharted waters! In this workshop let us explore what it means to travel without a map. Listening and learning with the Heart.

3. LAY COLLABORATORS (ONLY) GATHERING—an opportunity for the finance staff of the various congregations and institutes to share questions and experiences

4. “LIVING OUR LIFE STORY: THE EMINENT JOURNEY TO THE CENTER”—BEVERLY MUSGRAVE (REPEAT OF WORKSHOP #2)

Where we stand determines what we see. At this time in our life we are often navigating uncharted waters! In this workshop let us explore what it means to travel without a map. Listening and learning with the Heart.

5. “TRANSITIONING AND CONGREGATIONAL RESTRUCTURING: CIVIL LAW ISSUES TO CONSIDER”—TERRY CARTER

Many religious institutes are having to deal with governance transitioning and corporate restructuring as a result of reduced membership. This presentation will review the civil law challenges that boards and officials of religious Institutes are having to face as corporate entities experience reduced numbers, as well as reviewing options to consider in pursuing congregational restructuring, both within Canada and outside of Canada, including the distribution and protection of congregational assets.

6. “CLIMATE CHANGE - THE GREEN SWAN”—GUILLAUME BROUILLETTE

Climate Change is a potential green swan event and the physical impacts and transition drivers are a source of uncertainty, as well as investment risk and opportunity. A toolkit is emerging to help investors address climate change. The toolkit offers various approaches to climate action that can be tailored based on objectives.

Objectives can be:

- Deepen member alignment
- Reduce headline risk
- Increase portfolio resiliency
- Invest in solutions

This workshop will present some ideas for you to consider.

7. “BUDGET 2022 - IMPORTANT CHANGES FOR RELIGIOUS INSTITUTES”—KAREN COOPER

The 2022 federal Budget contained important changes to the rules applicable to registered charities. This presentation will focus on summarising those changes as they apply to religious institutes with a particular focus on the new rules for carrying on activities outside of Canada and changes to the disbursement quota.

WORKSHOPS continued

8. "PLANNING FOR THE FUTURE"—BETH JOHNSON AND JOHN RUETZ

Catholic Health Sponsors of Ontario (CHSO) was formed in 1998 as a Pontifical Public Juridic Person to assume responsibility for the sponsorship of health care organizations established by its seven founding congregations. Twenty years later, as congregations of vowed religious plan for their future, CHSO has extended its sponsorship model to take on responsibility for new programs and services, and to hold and safeguard assets for the use of Catholic works.. This presentation will provide an overview of CHSO and its Catholic Congregational Legacy Charity, and how CHSO is continuing the missions of religious congregations by ensuring resources and financial ability for health care, social housing, and community programs to promote health and relieve poverty. Specific examples will be highlighted, and lessons learned and suggestions for congregations will be provided.

9. "SUSTAINABLE INVESTING"—JESSE CHRUMKA

This presentation will aim to demystify the concept of sustainable investing, which considers the interplay between the long-term performance of one's investments and the well-being of society and the planet, via the consideration of environmental, social and governance (ESG) factors. Practical insights into how an investment portfolio can be geared towards a more sustainable approach will also be covered. The presentation will also include an introduction to impact investing, a topic of increasing interest for mission-driven organizations.

10. "CHANGING COURSE - CONSIDERATIONS WHEN CHANGING CIVIL CORPORATIONS"—KAREN COOPER

As religious institutes face changes to their mission and structure, they have been looking at the civil corporations they use to carry on most of their activities to ensure that they continue to serve the needs of the community. This presentation will discuss some of the issues to consider when making changes to the purposes and by-laws of civil corporations that are also registered charities.

11. "INVESTING FOR RELIGIOUS ORGANIZATIONS - BEYOND THE BOTTOM LINE"—

JOANNE YELLE-WEATHERALL & SOPHIE ALLARD

J. Yelle Weatherall (CRS) and S. Allard (Fiera Capital) will provide an overview of the Fiera CRS Ethical Balanced Investment Fund and the work Fiera and CRS do together. They will highlight the CRS Investment Policy and how Fiera Capital's responsible investing philosophy mirrors CRS's Vision, Mission and Values and will briefly describe means of oversight, transparency, and independence.

12. "CHALLENGES OF JUSTICE AND CARE IN THE POST-PANDEMIC WORLD AND CHURCH"—NUALA

KENNY, SC

Religious have provided care to the sick throughout history. This reflection will explore inadequacies in health care, mental health and public health with its focus on poverty and social marginalization which have been un-masked by the COVID-19 pandemic. It will propose contributions from Catholic social teaching toward reform of public health focused on the common good and "preferential option for the poor" with particular attention to new economic and political challenges.

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To book a flight with your promotion code, access aircanada.com and enter your promotion code in the Promotion Code Box.

Code: U4P4JXY1

For North America: 5% applies on standard fares, 10% on flex fares & higher.

Discount for travel provided by Westjet



Code: 6I9B0II

**The travel period begins:
9/14/2022**

**The travel period ends:
10/5/2022**

Westjet will offer 5% off Econo* and 10% off EconoFlex and Premium fares for travel within Canada and 2% off Econo*, 5% off EconoFlex and 10% off Premium base fares for guests travelling Trans-border. To take advantage of this offer, you will need the discount code listed above. This discount only applies to flights into Moncton. Please visit www.westjet.com/conventions to make a booking online.

**Travel Information from the Moncton Airport
(the hotel is about 10 minutes away depending on traffic)**



Taxi cost approx. \$19.00-\$25.00 not including tip.

No shuttle bus service is available from the airport to the hotel.

Deadline for Registration: August 8, 2022

Withdrawal: If you are unable to attend, substitution is accepted with a written or fax notice to the ATRI Office by **September 7, 2022**

Cancellation: Registration Fee less \$75.00 administration fee will be refunded if a written notice of cancellation is received in the ATRI Office no later than **September 7, 2022**

Please send to:

ATRI

101 Thorncliffe Park Drive, #151

Toronto, ON M4H 1M2

Tel: (416) 429-7331 Fax: (416) 429-7356

E-mail: atris@look.ca Website: www.atri.on.ca

Hotel Information

YOU MUST REGISTER WITH

Delta Hotels Beausejour

Hotel call-in Registration number: 1-506-854-4344
(ask for registrations under ATRI Conference)

When booking by telephone please use “ATRI Conference” to ensure you receive the appropriate rate and are included in the guestroom block

OR

You can also register at the Delta Hotels Beausejour via the internet at this link: [**Click here**](#)

If you are arriving early or staying later for the conference please contact the hotel directly at the number above or register on-line so that you can receive a conference rate for the extra days.

This hotel is “smoke-free.”

The Delta Hotels Beausejour is offering a Conference rate of:

Standard Room (single or double): \$169.00 (plus taxes)

(Complimentary internet access in all of the bedrooms)

“A deposit equal to one night's stay and tax will be charged at the time you make a room reservation. Deposit will be applied as payment on your guestroom bill. Deposits are refundable if notice is received at least 3 days (72 hours) prior to arrival. Deposit will be forfeited if cancellation notice is received within 3 days of arrival.”

All reservations must be made by **August 8,** 2022 in order to guarantee a room at the Conference rate.

Please note: All reservations must be made through the REGISTRATION PHONE NUMBER or Internet information PROVIDED ABOVE.

Check-in Time is 3:00 p.m. and **Check-out Time** is 12 noon. Guests arriving before 4:00 p.m. will be accommodated as soon as rooms become available.

PARKING: \$16.00 per day for hotel guests.

Conference 2020 Schedule

Friday, September 23, 2022

4:00-6:00 p.m.	Registration
7:00-8:00 p.m.	Welcome and Opening Ritual
	Social

Saturday, September 24, 2022

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:15 a.m.	Prayers
9:15-10:15 a.m.	General Session--David Couturier, OFM Cap.
10:15-10:45 a.m.	Nutrition break
10:50-11:50 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	LUNCH and Lay Collaborators Lunch
2:00-3:00 p.m.	<u>Workshops</u>
3:00-3:30 p.m.	Nutrition break
3:30-4:30 p.m.	AGM for Members, Lay Collaborators and Leadership Teams
5:00-6:00 p.m.	Mass in the Hotel—Presider Rev. Phil Mulligan
	Supper on your own

Sunday, September 25, 2022

7:00-8:30 a.m.	Breakfast
8:40-8:50 a.m.	Announcements
8:50-9:10 a.m.	Prayers
9:10-10:15 a.m.	General Session—David Couturier, OFM Cap.
10:15-10:40 a.m.	Nutrition Break
10:45-11:45 a.m.	<u>Workshops</u>
12:00-2:00 p.m.	Lunch
2:00-3:00 p.m.	<u>Workshops</u>
3:00-5:45 p.m.	Touring the city and free time are on your own
6:00-8:30 p.m.	Banquet and Entertainment in the hotel

Monday, September 26, 2022

7:00-8:30 a.m.	Breakfast
8:40-8:55 a.m.	Announcements
8:55-9:55 a.m.	General Session--David Couturier, OFM Cap.
9:55-10:25 a.m.	Presentations and expressions of gratitude
	Closing Ritual
10:25 a.m.	Nutrition break and box lunches for those who are travelling

Departure and safe journey to all!!

Our Sponsors

Our Annual Conference has been sponsored by a number of companies and individuals who very generously supported our event. We are very grateful for their contributions and wish them well in all of their future endeavours.

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