National Religious Retirement Office

# Application to participate in the Planning and Implementation Process

Revised 2/24/09

# INSTITUTE'S INFORMATION

**NRRO Cong ID#:**

Name of Institute: ______________________________ Cong. Initials: ___________

Address: ________________________________________________________________

City: ___________________________ State: ______________ Zip: ___________

Telephone #: ______________________ Website: __________________________

---

## SECTION ONE: PLANNING ISSUES

1. Please describe briefly your institute's most pressing concerns regarding care of the elder members.

2. Are these the areas of concern you want to work on in this process? If not, what are the current areas of concern?

3. Has the institute attempted to address this area in the past? If so, why was it unsuccessful or why is it being addressed again?

4. Please list two or three of the greatest strengths that your institute brings to this retirement planning process.

5. Please list two or three of the greatest challenges facing your institute in its retirement planning.

6. What areas of expertise are most needed to assist you in your planning:
   - ☐ Identification of planning issues and help in developing a planning process.
   - ☐ Review of elder care delivery and programs for the elder members.
   - ☐ Review of current financial and management strategies.

## **SECTION TWO**: CARE DELIVERY

1. Where and how does your institute currently provide care for the elders able to live independently?

2. Where and how does your institute provide care for those needing assistance?

3. Where and how does your institute provide care for those needing long-term or skilled nursing care?

## SECTION THREE: AGREEMENT OF RELIGIOUS INSTITUTE

Upon reception of this application, a member of the NRRO staff will contact the Institute to review this application and other necessary information.

We understand that participation in a pre-visit by the NRRO consultants and in the NRRO workshop is a requirement for receiving funds for planning assistance. We further understand that a well-developed plan for increasing our institute's capacity to care for the elder members and participation in a second site visit by NRRO consultants are requirements for receiving funds for implementation of our plan. (See Attachment 'A' for a full description of institute responsibilities.)

| | |
|---|---|
| ______________________ | ______________________ |
| Major Superior (Signature) | Date |
| ______________________ | ______________________ |
| Address | City/State/Zip |
| ______________________ | ______________________ |
| Telephone | E-mail |
| ______________________ | ______________________ |
| Treasurer (Signature) | Date |
| ______________________ | ______________________ |
| Address | City/State/Zip |
| ______________________ | ______________________ |
| Telephone | E-mail |
| ______________________ | ______________________ |
| Retirement Director (Signature) | Date |
| ______________________ | ______________________ |
| Address | City/State/Zip |
| ______________________ | ______________________ |
| Telephone | E-mail |

**SECTION FOUR**: Preference of dates to attend Planning and Implementation workshop. Please list your top three (3) choices:

**2010**:
_____January 22 – 24
_____April 20 – 22
_____September 14 - 16

**2011**:
_____January 21 – 23
_____April 5 - 7

Revised 2/24/09

# ATTACHMENT 'A'

### EXPECTATIONS FOR INSTITUTES PARTICIPATING IN THE NRRO PLANNING AND IMPLEMENTATION PROCESS

1. A site visit from an NRRO staff member before being accepted into the process.

2. The institute must be able to set aside time to identify and address retirement planning issues that will help the institute to reduce its retirement funding shortfall. The institute "planning team" should consist of
   a. The major superior or a council member with authority to make decisions in the retirement planning area
   b. The treasurer or chief financial officer (the person who actually handles the institute's financial management and planning)
   c. The retirement director (the person most responsible for assisting institute members through the transitions of aging).

3. NRRO will assign two consultants to work with your institute planning team. NRRO will share the following information with the consultants
   a. Retirement Needs Analysis
   b. Past NRRO requests for funds and NRRO consultation reports (if any)
   c. Report from NRRO with statistical information from the annual eligibility form submitted by the institute, e.g. age distribution, participation in government benefit programs, etc.

4. The NRRO lead consultant will contact the consulting partner and your institute to set up the date for a site visit to your institute. This site visit must take place before the workshop

5. The NRRO consultants will request any documents that they would like to review prior to their visit and indicate if other documents should be available for their review when they arrive. All information shared with consultants will be kept confidential.

6. The consultants will conduct the site visit (2 to 3 days). The focus of the visit is <u>assessment</u> to include
   a. Visit with the entire leadership to offer information, gain perspective and elicit the institute's hopes for the process
   b. The institute planning team (major superior, treasurer and retirement director) will be the primary persons involved with the consultants during the visit.
   c. The visit should include all significant sites, even if geographically dispersed.
   d. The goal of the visit is to review what has been done and what is being done now in the area of retirement. The consultants will make an assessment of the consistency between current practice and the institute's written documents; they also will determine if their personal perceptions are in concert with the information provided to them.
   e. This visit is intended to be conducted in an evaluative / assessing mode; the consultants and the institute are encouraged to avoid prematurely entering into planning and problem solving during this visit.

    f. The consultants will collect any statistical data that may be needed for the final report. (They will not be writing their report or formulating recommendations at this time.)

*(Note: NRRO will pay for the travel expenses of the consultants and provide them with a stipend. NRRO asks the institute to provide room and board for the consultants during their visit.)*

7. The institute planning team is expected to
    a. Read ***A Future Full of Hope***: **Planning in Religious Institutes** (A manual published by NRRO in 2008), and view the accompanying DVD (NRRO will send a copy to each member of the team).

8. The three members of the institute planning team are required to attend a planning workshop hosted by NRRO. The consultants also will attend this workshop and work with the institute to further clarify issues that may help to reduce the unfunded retirement liability and how NRRO funding might best assist in this process.

   *(Note: NRRO will cover the cost of travel and housing for the institute representatives and the consultants.)*

9. The Institute may submit an application for Planning Funds after the workshop.

10. The institute planning team and consultants will stay in touch via monthly conference calls. One member of the NRRO staff will serve as a liaison for each participating institute. The assigned NRRO staff member will join the conference call as an "observer" in Month 3 and Month 6 to get a sense of how this pilot program is proceeding and what adjustments may need to be made.

11. The NRRO Representative will visit the institute sometime after the workshop but before the institute submits the application for Implementation Assistance.

12. The consultants will conduct a final visit and exit meeting either in person or via conference call. (Format to be determined by status of previous work with the institute and the state of the institute's planning process.)

13. The institute will submit an application for funds to implement the plan it has developed.

14. The consultants will submit to NRRO a report and a recommendation for funding. They will give a copy of this report to the institute. The report also will contain the consultants' recommendations for further steps that might be considered by the institute for future retirement planning efforts.

15. The institute's request for funds and the consultants' report and recommendations will be submitted to the NRRO Review Board and Management Board.

16. After the meeting of the Management Board, the institute will be notified of the decision regarding their request for funds.

17. The institute agrees that if there is a change of leadership during the planning and implementation process, the new leadership team will commit to continuation of the process.

Revised 2/24/09