



## **NATIONAL RELIGIOUS RETIREMENT OFFICE**

### **Eldercare Consultation Service**

#### **PURPOSE OF CONSULTATION**

The National Religious Retirement Office (NRRO) offers a consultation service to assist religious institutes in planning for and evaluating care delivery for their elder members. Assistance is offered to religious institutes in the following areas:

1. evaluating strengths and challenges of their eldercare delivery
2. assessing the quality and effectiveness of their eldercare delivery and the cost of care associated with that delivery
3. identifying, assembling, integrating and interpreting the information needed to improve the care being delivered and for future retirement planning,
4. reviewing the use of professional advisors and/or consultants, if applicable
5. reviewing management staffing, planning, policies and procedures, as they impact eldercare delivery
6. recommending options for the future of eldercare delivery

#### **CONSULTANTS**

NRRO screens, selects and trains the volunteer consultants. The consultants have experience in eldercare delivery, eldercare management, social services, finance, and/or institute leadership. The consultants represent a wide variety of professional expertise and geographic locations.

The cost of the consultation service includes a \$1500 stipend per consultant and reimbursement for each consultant's travel costs, as necessary. The host institute is expected to provide room and board for the consultant(s) during the visit, as needed.

All information shared with NRRO and its consultants is held in confidence.

#### **THE VISIT**

One or two consultants, depending on the size of the institute, visit the site of eldercare delivery either in person or via ZOOM, if an in-person visit is not possible. NRRO tries to match the skills and experience of the consultant(s) to the institute's needs.

During the visit, the consultant(s) will:

1. Meet with institute leadership, eldercare team and finance director at the opening of the consultation to define the expectations of the visit and to articulate the chief areas of concern. This is a time for clarification of the process,

setting mutually realistic objectives for the visit, and establishing a basic understanding of the institute's charism and mission.

2. Meet individually with leadership, eldercare team and finance director as needed to:

- a) review and analyze community statistics, planning, financial and retirement data;
- b) review current use of, and need for, professional advisors and consultants;
- c) obtain a sense of the scope of resources and needs through a tour of the physical plant with attention toward the safety challenges for the elder members,
- d) evaluate management in areas such as:
  - i) operational policies and procedures
  - ii) cost of care
  - iii) retirement planning
  - iv) eldercare delivery

3. Analyze findings and draft a report with recommendations for follow-up steps.

4. Meet with leadership, eldercare leaders and finance director at the conclusion of the visit to discuss the draft report and the proposed recommendations, observations and follow-up suggestions.

#### **AFTER THE VISIT**

After the visit, the consultants submit the report of their visit to the institute leader and to NRRO. The report includes the following sections:

1. major strengths of the institute in relation to eldercare
2. major challenges of the institute in relation to eldercare
3. evaluation of management, planning efforts, organization of operations, use/need for outside professionals, financial position, plant and property regarding safety issues, and retirement planning /programs
4. summary of observations
5. recommendations of follow-up actions for the institute

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