

AVERAGE COST OF CARE

Consistency in the reporting of data by religious institutes is a value to NRRO. Increasing the accuracy of data enables a more consistent distribution of grants, helps identify services that will benefit institutes with specific needs, and gives a more accurate representation of the institutes' total net resources.

Varying organizational and management styles in religious institutes necessitates the modification of the standard form used to calculate cost of care. Along with the original form, two modifications are included to assist with the calculation of cost of care, breaking the cost down by levels of care. The style of the institute will determine which form or forms to use to calculate cost of care.

If an institute has developed internal processes for the ongoing calculation of cost of care into levels of care, and parallels the expense categories of the NRRO forms, this process can also be used to generate the information needed to complete the eligibility form.

Each form has the same intent: 1) to find the average cost of care for members age 70 years and above by care level, 2) to standardize the calculation of the average cost of care among religious institutes, 3) to assist persons responsible for the stewardship of community resources to consider all factors that impact the cost of care, and 4) to provide the information needed for effective long range planning.

FORM B is used by institutes whose total membership lives in one location (with the possible exception of infirmed members receiving outside care). This is particularly formatted to assist contemplative institutes and other institutes with all members living in common. This form breaks down retirement costs into two categories; independent living and assisted/skilled care.

FORM B
AVERAGE COST OF CARE
ALL MEMBERS AT ONE LOCATION

V. Total Census of Institute

- Y. Census >= 70
- Y.1 Independent Living
- Y.3 Nursing care required

PART 1 GENERAL INSTITUTE EXPENSES

1. TOTAL INSTITUTE ADMINISTRATION

1.

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2. PERSONAL LIVING COSTS

- A. Personal needs
- B. Housing
- C. Staff salaries and benefits (not nursing)

2A.
2B.
2C.

3. AVERAGE ANNUAL UPKEEP EXPENDITURES

- A. Building Improvements
- B. Equipment
- C. Automobiles

3A.
3B.
3C.

4. TOTAL EXPENSES

4. \$0

5. TOTAL CENSUS ("V" ABOVE)

5. 0

6. AVERAGE GENERAL EXPENSE (4 / 5 = 6)

6. #DIV/0!

PART II - MEDICAL EXPENSES MEMBERS >+ 70 YEARS

7. MEDICAL EXPENSES

- A. Total of insurance premiums for members age 70 and above
- B. Medical costs for members age 70 and above (after reimbursements)
- C. SSI receipts (to subtract)

7A.
7B.
7C.

8. SUBTOTAL MEDICAL EXPENSES for ages 70+ (7A+7B-7C)

8. \$0

9. CENSUS >= 70 YEARS ("Y" above)

9. 0

10. AVERAGE INDEPENDENT LIVING MEDICAL EXPENSES (8/9=10)

10. #DIV/0!

11. ASSISTED / SKILLED CARE

- A. Total Assisted/skilled care expenses (including nursing) report amount after direct payments from Medicare, Medicaid, Title 19, Title 18, SSI and private health insurance
- B. Census receiving assisted/skilled care ("Y.3" above)

11A.

11B. 0

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12. Average Assisted/Skilled care cost (11.A/11.B=12)

12 #DIV/0!

13. AVERAGE COST OF CARE PER PERSON

- A. Independent Living (6 + 10 = 13.A)
- B. Assisted/Skilled care (6+10+12 =13.B)

13A. #DIV/0!
13B. #DIV/0!

Definition

1. Administration INCLUDES

Insurance
Travel of administrators
Office and library expenses
Meetings
Funerals
Retreats / chaplain / sacristy
Legal fees

1. Administration Excludes

Education
Formation / Vocation
Development
Charity
Ministry expenses (e.g. altar bread)
FICA payments
Mortgage and loan payments

2A. Personal needs INCLUDES

Food
Clothing
Supplies & personal items
Recreation
Travel

2B. Housing INCLUDES

Utilities
Maintenance & Repairs
Rent if applicable
House / supplies and laundry

3. Average Upkeep Expenditures INCLUDE

Average annual cash outlay at this location for building improvements, equipment and automobiles.

Average Upkeep Expenditures EXCLUDES

New buildings or extraordinary costs.
Amortize large capital expenses / improvements on a depreciation scale.

7C. Skilled care expenses INCLUDE

Nursing home expenses
Payments to other religious institutes for care of members
Social Security paid for Title 19 recipients
Home health care fees
Salaries / fees to nurses