



ANGELICAN DIOCESE OF NELSON

OLDER PERSONS' MINISTRY FUND

GUIDELINES & SAMPLE APPLICATION FORM



INTRODUCTION

This handbook has been compiled to assist you and your Parish/Deanery to apply for the Older Persons' Ministry Funding. The purpose of this funding is for programmes or projects which focus on and benefit those aged 65 years and older, however there is discretion to include those aged from 50 years upwards whose needs align with those over 65.

HISTORY

The Diocese of Nelson originally owned and operated the Whareama Retirement Home in Stoke. This was sold in 2008 with the capital realised from the sale of the home being invested. The Older Persons' Ministry Fund represents some of that capital (and includes the capital advanced to the Home by the Ministry of Health for upgrade and improvements). The income generated is tagged specifically for Ministry to Older People.

The Government strategies have been included here so that you have easily available information which clearly indicates the community-facing aspects of this ministry and upon which the balance of approximately 12.5% of capital funds depends.

If you have any questions relating to your project or application, please get in touch with:

Charles Tyrrell, Bishop's Advisor for the Care of Older People
Ph 03 5483124 CharlesT@nelsonanglican.org.nz

If Charles is not available please contact:

Gerrie Mead, Nelson Diocese Social Services Enabler
Ph 03 5483124 Gerriem@nelsonanglican.org.nz

The application form is available on www.nelsonanglican.org.nz
Choose "Resources" on the home page and scroll down. Alternatively it can be emailed to you by contacting Charles or Gerrie.

All applications must be accompanied by a copy of the resolution from your Parish Vestry (or Deanery) supporting the project and approving the application. It is preferred if you type and email your application.

Older Persons Ministries Fund

Extracts from minutes of a meeting of the **Standing Committee** of the Diocese of Nelson held on Tuesday 13th April 2010 12.30pm in the Anglican Centre Board Room, Halifax St, Nelson; and updated from resolutions of Standing Committee of the Diocese of Nelson made on the 12th March 2013.

Whareama Home Funds Task Group Final Report

Group members Vicky, Jen and Gerrie presented their report and answered questions. It was noted that the Anglican Care Charitable Trust is holding some applications for this funding. The Standing committee then had a wide ranging discussion on what the criteria for disbursement of these funds should be.

It was moved that the following principles be adopted:

- Projects are primarily to be Anglican based – either through a parish or deanery or a combination of both parish and deanery.
- A parish/deanery or other Anglican body may form a partnership with another organisation but the Anglican body is to prepare the application and must have a role in the governance of the project.
- It would need to be proved by the applicant that adequate structures are in place to oversee each project.
- Staff salary certainty should be guaranteed for not less than three years for specific projects.
- There must be equity in funding between and within regions of the Diocese.
- Negotiation within deaneries as to the application if these funds, is to be encouraged.
- Though there is provision for an allocation to each parish, a robust application is still necessary before funds are released to the parish.
- It is important that the Church looks at funding areas of need that will not be funded by the State or other providers.

It was moved that:

- That Fund income of \$5,000 each year, with a maximum accumulation of 2 years, be set aside for each parish to apply towards care of older people.
- That applications to the parish's non-contestable fund can be considered by ACCT at any time.
- The balance of the Funds annual and accumulated income is a contestable fund for projects supporting the care of older persons.
- The contestable Fund is to be proportioned by population of older persons in each deanery - 30% for Marlborough, 15% for Mawhera and 27.5 % for both Waimea and Nelson.
- All projects, even those using the parish portion funding are dependent on a robust project application which meets the criteria.
- Parish or Deanery projects must use their own allocation first before applying for contestable funds.
- The allocation for each parish is not available to contribute to or supplement clergy stipends for carrying out normal ministry duties or functions.

Arising from the report it was moved:

1. That this funding (to be called Older Persons' Ministries Fund) be dedicated to the care of seniors and concerns for eldercare.
2. That the focus is not solely for Anglicans but to be community-facing and reaching outside the church.
3. That the allocation of funding is mindful of the issues surrounding creation of new roles, sustainability of roles and employment of appropriate professionals (the impact of short term funding for positions need to be viewed in a total career path for the person).
4. Funding is not to undermine or diminish the volunteer work already meeting parish needs.
5. Funding should not be used to subsidise or to augment stipends.
6. There may be special cases in which a separate contract is negotiated that could conceivably be used for a staff member on a part stipend for a clearly defined and agreed piece of work.

7. That the responsibility for the distribution for the Older Persons Ministry funding be delegated to the Anglican Care Charitable Trust.
8. That allocations are not made in competition with other funding resources and that programmes seek to make use of partnerships with other providers in elder services.
9. It is accepted that criteria is set which allows flexibility and response to locally identified need.
10. There is an inbuilt mechanism for recalling funds;
 - a. not used as indicated by the application
 - b. not accounted for accurately in the spending
 - c. where a programme or role is shown to be ineffective

It was moved that:

Criteria for applications for Older Persons Ministries Fund will be:

- Proposal to meet locally identified or perceived needs
- Meets objectives of Health of Older People strategy
- Supports “Ageing in Place” concept
- Programmes which make a difference and provide local solutions particularly where smaller cohorts mean services are not able to be provided as viable businesses by mainstream providers
- Provide supports which are not currently available – would take into account government and NGO programmes/funding already in place
- Programmes which seek to fill gaps in mainstream services
- Proposal demonstrates inclusive philosophy and how individual/group needs will be met. Creative and innovative use of smaller amounts which benefit widely within the community.
- Volunteer expenses for such items as transport in isolated locations.
- Proposal includes objectives to be met and adequate reporting back mechanism.

It was agreed that Appendix 3 (Positive Ageing Strategy) with minor editing be adopted as a guideline for applicants and the ACCT when making or considering applications.

Implications related to funding paid positions with Older Persons' Ministries money:

There are three perspectives to consider when thinking about paid positions, the employee's situation, the position for the employer or project management team and the interests and objectives of the funder.

Employee

A well qualified person is unlikely to be interested in leaving one position for another unless there is some certainty of the position being for at least two years. This wouldn't necessarily apply if the position was part time.

Some new projects may take some considerable time to be fully operational and satisfying for the employee, by the time they are doing their best work, they may start to feel insecure because of funding issues.

Having to make funding applications for one's own job is a nightmare.

Employer/Project Manager

New projects can take some time to establish and/or prove their worth, if there is no certainty of funding from year to year, this makes advertising for an employee very difficult. Unless there is someone known to the project team who is not reliant on a funded position, it is difficult to attract the right person.

Some projects are based on perceived needs, as the service has not been offered before so there may not be statistics to back up funding applications.

Some projects, especially those as above, take time to reach their full potential, once again making the position of employment of staff more difficult.

Funder

Many projects are dependent for their success on the right person being employed (if the position is a paid one). It is unlikely that a well qualified person will leave a position which has good career prospects if there is no security of tenure.

It would not take many projects with full time paid positions for the majority of funding available being taken up by “rolled over” applications for funding of paid employees, thus denying new projects getting started.

It can be difficult to fund payment for staff from other sources.

Possible solutions

- Setting a cap of a certain percentage of the funds to be available for salaries/honorariums.
- Having prearranged balance of new projects to ongoing projects.
- Having written guidelines (with a clause to indicate they can be varied if necessary) will avoid the situation of decisions being perceived as directed at a particular application.
- Applicants being given certainty of ongoing funding for salaries (subject to positive feedback and accountability) for a specified period of time.

The New Zealand Positive Ageing Strategy (Ministry of Social Policy 2001)

Executive Summary

The New Zealand Positive Ageing Strategy reinforces Government's commitment to promote the value and participation of older people in communities. Older people are important members of society and have the right to be afforded dignity in their senior years. They have skills, knowledge and experience to contribute to society and the expected growth in the proportion of older people during the coming decades will provide New Zealand with a valuable resource. Further, continued participation in older age has benefits for the individual concerned, the community, and the country as a whole.

The aim of the Positive Ageing Strategy is to improve opportunities for older people to participate in the community in the ways that they choose. This will be achieved through identifying barriers to participation and working with all sectors to develop actions to address these, while balancing the needs of older people with the needs of younger and future generations.

The New Zealand Positive Ageing Strategy provides a framework within which all policy with implications for older people can be commonly understood and developed. The framework incorporates broad principles that will guide the development of policies and services from a wide range of government agencies. It also identifies key areas that contribute to positive ageing.

A review of existing policies and services has been undertaken to ensure consistency with the Positive Ageing Principles. In addition, extensive public consultation has identified priority areas for action, leading to the development of a government Action Plan for positive ageing in New Zealand.

The following Positive Ageing Principles will guide the development of policies and services across the government sector into the future.

Effective positive ageing policies will:

- Empower older people to make choices that enable them to live a satisfying life and lead a healthy lifestyle;
- Provide opportunities for older people to participate in and contribute to family, whānau and community;
- Reflect positive attitudes to older people;
- Recognise the diversity of older people and ageing as a normal part of the lifecycle;
- Affirm the values and strengthen the capabilities of older Māori and their whānau;

- Recognise the diversity and strengthen the capabilities of older Pacific people;
- Appreciate the diversity of cultural identity of older people living in New Zealand;
- Recognise the different issues facing men and women;
- Ensure older people, in both rural and urban areas, live with confidence in a secure environment and receive the services they need to do so; and
- Enable older people to take responsibility for their personal growth and development through changing circumstances.

The Positive Ageing Strategy identifies ten priority goals, with recommended actions to achieve these goals. Specific work items will be undertaken by government departments to work towards the goals. However, their achievement also depends on the contributions of other sectors of society.

The Vision

Older people participate to their fullest ability in decisions about their health and wellbeing and in family, whānau and community life. They are supported in this by co-ordinated and responsive health and disability support programmes.

The Objectives

The following eight objectives identify areas where change is essential if the vision is to be achieved.

1. Older people, their families and whānau are able to make well-informed choices about options for healthy living, health care and/or disability support needs.
2. Policy and service planning will support quality health and disability support programmes integrated around the needs of older people.
3. Funding and service delivery will promote timely access to quality integrated health and disability support services for older people, family, whānau and carers.
4. The health and disability support needs of older Maori and their whānau will be met by appropriate, integrated health care and disability support services.
5. Population-based health initiatives and programmes will promote health and wellbeing in older age.
6. Older people will have timely access to primary and community health services that proactively improve and maintain their health and functioning.
7. Admission to general hospital services will be integrated with any community-based care and support that an older person requires.
8. Older people with high and complex health and disability support needs will have access to flexible, timely and co-ordinated services and living options that take account of family and whānau carer needs.

Extract from “Ageing in Place”

Judith Davey, NZ Institute for Research on Ageing - VUW

Introduction

“Ageing in place” is a well-used concept as governments look to the future in an ageing world. In 1994, the health and social policy ministers of OECD countries reached an agreement on the overall objective of policies for the care of frail older people:

“Elderly people, including those in need of care and support should, wherever possible, be enabled to continue living in their own homes, and where this is not possible, they should be enabled to live in a sheltered and supportive environment which is as close to their community as possible, in both the social and geographical sense. (OECD 1994:3)”

Internationally it has become accepted that traditional institutional care that keeps older people apart and medicalises old age is no longer desirable and perpetuates a negative view of ageing. Most OECD countries are committed to reducing the number of people living in institutions (OECD 2003:11). “The ageing process should no longer be viewed as an inevitable economic and social isolation from the rest of the community” (OECD 2003:173). Ageing in place therefore implies that older people will remain in the community, either in their family homes, in homes to which they have moved in middle or later life, or in supported accommodation of some type, rather than moving into residential care. It also implies living independently of other family members. There has been a decrease in intergenerational living in most developed countries, even for frail older people (OECD 2003).

In New Zealand, policy statements also promote ageing in place. The New Zealand Positive Ageing Strategy (Dalziel 2001:10) aims to encourage and assist older people to remain in their own homes, in order to enhance their sense of independence and self-reliance. And the Health of Older People Strategy (Ministry of Health 2002:3) proposes an integrated approach to health and disability support services, which is responsive to varied and changing needs, supports older people remaining in their own homes, and reduces the need for institutional care.

The policy emphasis on ageing in place is reflected in the personal preferences of older people themselves, who prize their autonomy and independence. This emerged from consultation forums with older people held to contribute to the New Zealand Housing Strategy (Housing Corporation New Zealand 2005:61) and in literature reviewed for the CHRANZ Accommodation Options report (Davey et al. 2004). In New Zealand a high proportion of people remain in their own homes until the end of their lives.²

As part of activities in the International Year of Older Persons, the (then) Senior Citizens Unit and the Ministry of Social Policy carried out a study of the factors affecting the ability of older people to live independently (Dwyer et al. 2000). The study pointed out the social, economic and service requirements if people are to age positively “in place”. These include family support and care and the provision of home-based services through public, private or voluntary sector agencies. However, “Well designed, easy to manage, affordable, warm and safe housing is as important to independent living as inputs of care” (Dwyer et al. 2000:33, quoting a study undertaken in the United Kingdom).

For older owner-occupiers,³ remaining at home may depend on their ability to have their houses maintained, modified or adapted in order to keep them in good condition and able to fulfil their needs. Most housing has not been designed with older age and impairment in mind, and the arrangements of the home environment often inhibit the ability of a person to manage their daily life. In addition, maintaining a property to a reasonable standard can be difficult for low-income homeowners. Deficiencies in housing may reinforce dependency and increase pressure on support agencies (Harrison and Davis 2001, Tinker et al 1999). Less than adequate housing conditions might ultimately threaten wellbeing and health and lead to premature entry into residential care.

As policy is developed to promote ageing in place, it is important to take into account the attitudes, opinions and preferences of the older people themselves and how they see their current and future housing circumstances. This is in line with United Nations research priorities which call for research on the quality of life of older people to take into account the views of the older individuals themselves (United Nations 2002). The research described in this paper was funded by the Ministry of Social Development, and aimed to explore housing issues with older homeowners from their own perspectives, covering:

- current suitability of housing
- likely future suitability of housing
- maintenance (defined as regular work needed to maintain housing quality; e.g. clearing gutters, cleaning exteriors)
- renovation (defined as work to renew the housing fabric and services or to extend accommodation, which is not usually required on a regular basis; e.g. major repainting, rewiring, adding rooms)
- adaptation (defined as changes to housing required as a result of disability or frailty affecting the residents; e.g. installing ramps, safety rails, special bathroom fixtures)
- the perceived influence of housing quality (including all of the above) on the ability to age in place.

SAMPLE APPLICATION FORM



OLDER PERSONS MINISTRY FUND(OPMF) APPLICATION

If you need any assistance with this funding application or in planning your project/service please contact: Charles Tyrrell

Office 03 548 3124
Email: charlest@nelsonanglican.org.nz

Note: This application must be accompanied by a resolution from your parish vestry supporting the programme and approving the application.

Application for Funding (Closing Date: 1st August)

Application from Parish(es)/Deanery :

Application made by:

Position in the Parish:

Address for notification:

Bank Acc No for payment if grant approved:

Date of Application:

How much are you applying for?

Category: **Senior Citizens**

1. Project Name:

2. Project Background:

2.1 What need has led to the project?

2.2 How was the need identified?

2.3 Who from the wider community have been consulted? (Individuals and/or groups)

2.4 How does the project fit into the overall mission of the parish(es)?

2.5 What support exists within the parish(es) for the project? (In addition to church support listed, please attach a letter of support from Vestry or Vestries)

2.6 What support exists within the wider community for the project?

3. Description of project/service:

3.1 What is the project/service?

3.2 Is this a new/existing project? (If existing, how long has it been in operation?)

3.3 How will you deliver it?

3.4 When will it run?

3.5 Who will use it?

3.6 Where will it be located?

3.7 How will people know about it?

4. Project/service operation

4.1 What are the expected project outcomes?

4.2 Who is responsible for overseeing the project?

*4.3 Do you have written Job Descriptions, safety policies etc?
(please attach)*

4.4 What training (initial and ongoing) and support is offered to those involved in project delivery?

4.5 What processes are built in for evaluation/reflection?

4.6 What systems are in place to promote sustainability?

5. Budget

5.1 You need to provide a breakdown of how the funds will be used. (Give annual or total cost. No "Sundry" or "Miscellaneous" amounts. Travel costs are to be estimated at 39c per km. Please show income and expenditure along with parish commitment. You can attach a separate budget.)

5.2 Have approaches been made to other funding sources? (If so, please give details outlining the amount requested and the date of application.)

5.3 'Please state what Parish Trusts or other Funds are held and why these are not available for this project'.

5.4 Are the monies requested a grant or loan? (If a loan, indicate the rate at which or when you can repay this.)

6. Anglican Care

6.1 Will you use the Anglican Care logo on any material relating to this project?

6.2 Do you agree to abide by the Anglican Care Code of Ethics in providing this service?

6.3 If granted funding from the Anglican Care Trust do you agree to provide an accountability report each year?

Office Use

Date application received:

Date of meeting(s) when considered:

Outcome:

Accountability report due date: 31st March each year