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Program for Active Living

“It Takes a Village to Care” is the motto at Schlegel Villages, a Canadian owned and operated Senior Living organization that includes eleven Villages; designed, built and managed by the Schlegel family of Kitchener, Ontario housing approximately 2500 seniors. Each Village has a Long Term Care component, with Full Service Retirement Living, Assisted Care, Memory Care and Independent Living options being added in stages. Fifteen years after the first Schlegel Village opened in 1998, it continues to look to the future to meet the needs of its community with expansions planned at several locations to house a total estimated 7,000 seniors over the next 10 years.

A shining example of The Village’s motto is its Program for Active Living (PAL), a collaborative environment where kinesiologists, physiotherapists, and occupational therapists work together to improve the quality of life of residents by maximizing their independence. Not only did the organization receive an exemplary rating for promoting wellness for PAL’s activities that improve and/or maintain the function levels of its persons served during its CARF accreditation survey last fall, but the organization’s newsletter, “Village Voice,” consistently hears of how residents’ quality of life improves through the work of dedicated team members and PAL.

In an effort to emphasize optimal health and life purpose for each resident, PAL works to achieve its residents’ goals through clinical interventions with residents, education, and research. Clinical interventions can include individualized programming, intensive rehabilitation, and group programming such as general fitness classes, strengthening classes,

balance classes, and walking groups. All residents are encouraged to participate in PAL and they can choose to attend a variety of innovative programs which are captured on a monthly calendar. Education is an important part of PAL and is available for personnel, persons served and families through information sessions, in-services, newsletter articles and display boards for team members, residents and families. Sample training includes Lift Certification/Safe Handling Techniques, Falls Prevention and Back Care. The research component of PAL is a partnership with the Research Institute for Aging, through which the effects of aging and physical activity on cognitive and motor functions are examined.

With the focus of PAL being to enhance quality of life, the onsite team works together by discussing resident goals and abilities, determining interventions and programming. The therapies involved complement each other, while maximizing resident involvement. Although each therapy discipline is important to the process, the piece that makes this program stand out from other therapy programs is the role of the kinesiologist.

Schlegel Villages employs a full time kinesiologist for each of their Village Continuums to oversee PAL. They act as a liaison between the therapies within each Village Continuum; keeping in mind the unique needs of the persons served. All therapies work off of one referral form, and they collaborate to ensure the whole picture is covered and not duplicative. Kinesiologists are human movement specialists and are able to use their education and experience to maintain, rehabilitate, and enhance movement and performance. As they are employed by the Villages, they are not restricted by funding, and can enhance the amount of therapy received by residents. By offering innovative programming to engage the person physically and cognitively the kinesiologist can step in and bump up the therapy a person is receiving from three days a week to five. They also market to the external community by attending trade shows and providing information and education on areas such as balance and stretching.

“The benefit of our Program can be demonstrated by the number of success stories following the expansion of The Village of Riverside Glen. Residents who thought they could not improve started to see changes with participation in our Program,” shared Jaimie Killingbeck, PAL Coordinator.

The many therapists that make up PAL continue to see the fruits of their labor whether it’s through the success of the persons served in intensive rehabilitation; its various group programming; or its education efforts with its staff, residents, families, and the external community. Kinesiologist Christine Hames sums up the theme of the program best when sharing the success story of a person served by PAL with the organization’s newsletter when she states, “His success is my success”.

For more information on Schlegel Villages and the Program for Active Living check out www.schlegelvillages.com or www.the-ria.ca for more information on The Research Institute For Aging and research opportunities.

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FAP Member Highlight: Amy Hayman

With over 23 years of corporate and investment banking experience, Amy Hayman has lent her expertise with other industry leaders to CARF–CCAC’s Financial Advisory Panel (FAP)

for the last seven years. As a Managing Director for Cain Brothers & Company, LLC, Hayman will tell you that all organizations have room to improve and that one of the most effective ways to improve the quality of care is to measure both financial and nonfinancial data. Measuring both, Hayman says, will help identify areas for improvement in the organization.

“Financial ratios help organizations identify areas on their financial statements that need improving; however, financial ratios alone don’t give sufficient data to help recognize areas that need improvement,” Hayman says. Organizations that measure operational data are able to implement changes to that area that lead to higher quality of services.”

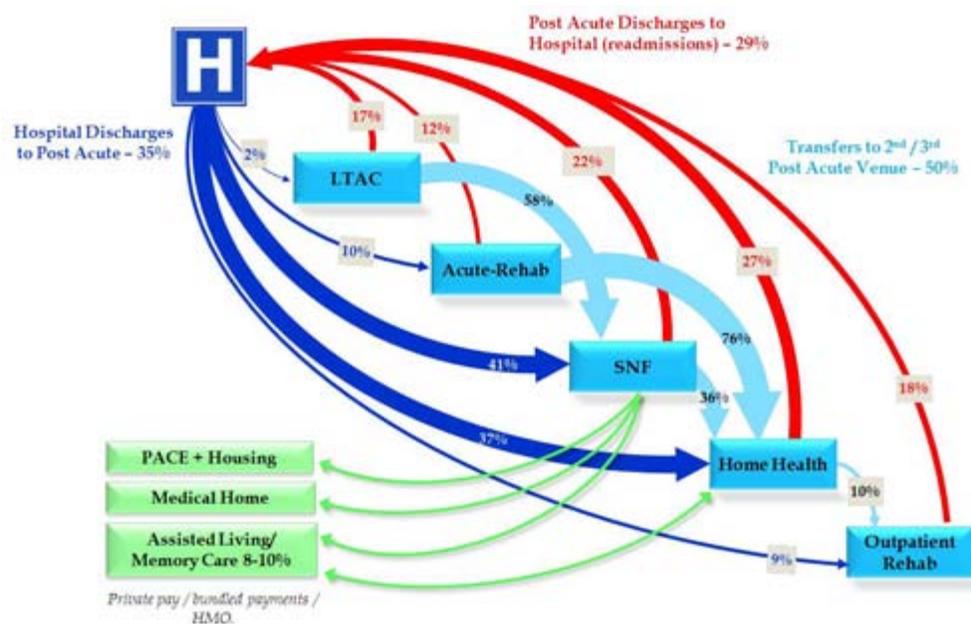
Hayman goes on to share how continuous quality improvement through measurement is directly tied to one of the current trends she and her organization are seeing, a focus organizations have on managing the flow of patients in post-acute care in light of changes with the new legislation.

“We are working with hospital systems and how they are evaluating their senior housing components and how they fit into the continuum especially with healthcare reform, bundled payments, and ACOs [accountable care organizations],” shares Hayman.

Local, standalone, or senior-oriented only providers need to understand how they can fit in and what it means to them organizationally and financially, Hayman continues. The graphic below shows post-acute patient/population flows and the degree to which problems require re-hospitalization. By measuring quality outcomes, Aging Services providers can have data at hand to provide hospital systems to help them engage in partnerships such as ACOs.

“The key here is that supportive post-acute services are a key to managing healthcare costs,” says Hayman.

Below: Supportive post-acute service is key to managing health care costs (image courtesy of Cain Brothers & Company)



Along with measuring data, Hayman believes that developing a strategic capital plan, integrated into the organization’s strategic plan, is critical to continued success in providing

the highest quality of services possible. She suggests including five-year forecasting with the strategic capital planning to help identify potential issues before they occur so that adjustments may be made to help mitigate future potential issues.

Hayman stresses that, “A strategic plan must be a fluid document that is reviewed regularly and updated to incorporate changes in the organization’s primary market, regulation, reimbursement, and the financial market and adjust the business model accordingly. Organizations that don’t change with the market may struggle.”

As a member of the FAP, Hayman and other industry leaders share recent trends seen in Aging Services with CARF–CCAC, which helps refine standards to ensure that they stay current with the market. In addition to participating in regular legislative updates and providing insights into current trends, Hayman enjoys the energy and free exchange of ideas with other members of the FAP residing across the country.

“The dialogue provides CARF–CCAC with intelligence of what to expect in the months and years to come,” says Hayman.

Hayman shares that her experience as a member of the FAP has proved to her beyond a doubt that accreditation provides a material benefit to organizations that are looking for ways to improve operations.

“Accreditation is a recognition of operating at a competent and credible level, but being part of the FAP has taught me that it is so much more than a stamp of approval. I view accreditation as a relatively inexpensive way to access strategic advice to help organizations measure themselves and benchmark against other organizations and identify areas of improvement,” says Hayman.

During her tenure as an investment banker in senior living, she has completed over 70 long-term care transactions totaling over \$3 billion in par value. She also has experience completing valuations of senior living providers and is active with mergers, acquisitions, and sales within the senior living industry. She is also a frequent speaker at healthcare conferences across the country.

Prior to joining Cain Brothers & Company, she served as Vice President at B.C. Ziegler and Company, specializing in senior living finance. Prior to that, she spent seven years in corporate banking. Hayman grew up in Madison, Wisconsin, and received a Bachelor of Business Administration degree from the University of Wisconsin, Madison.

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Congratulations to the 2012 Surveyor Training Class

Congratulations to the most recent surveyor training class of professionals. This past February at CARF’s Tucson office, eighteen Aging Services professionals from CARF-accredited organizations across the United States and Canada gathered for two-and-a-half days of training. They were joined by three of CARF’s veteran surveyors, Heather Janes, Vice President, Resident Services at Christie Gardens in Toronto, Ontario; John Jones, Vice President of Judson Manor at Judson Services, Inc., in Lakewood, Ohio; and Kevin McLeod,

President and CEO of Carolina Meadows in Chapel Hill, North Carolina, who attended as mentors. In the role of mentor, Janes, Jones, and McLeod assisted the surveyor trainees by providing guidance, expertise, and support throughout the training process.

As CARF surveyors, these individuals will directly affect organizations' business practices, performance, and ultimately the quality of service persons receive. They are also instrumental in the ongoing development of CARF standards and the accreditation process.



Left: John Jones and Heather Janes in Tucson, Arizona, for surveyor training.

Jones had this to say about his experience as a mentor:

“I must say, my first time as a mentor in CARF training was awesome. To be able to sit back and observe how naturally relationships were formed, and how trainees tapped into each other’s areas

of expertise, was truly enriching. The CARF staff creates an environment that facilitates such dynamic learning. One can expect many benefits not only personally, but also for one’s respective organization.”

CARF surveyors accumulate a number of significant and substantial benefits for themselves, their organizations, and the field, including an opportunity to learn from other providers, a chance for professional networking, free registration fees at most CARF-sponsored events, a chance to contribute to the quality of services in organizations, and travel opportunities both domestic and international. A surveyor’s organization also benefits from new ideas gained from surveying, exposure to national and international trends in the field, and having a staff member who is up to date with changes in the field and the CARF standards.

Aging Services surveyor training for 2013 will be held in Tucson, Arizona, February 27 through March 1. Those interested in becoming a surveyor are encouraged to submit an application. Applications can be found online at:

www.carf.org/About/CARF-surveyor-applicant-questionnaire

The application deadline for the 2013 surveyor training is October 25, 2012, so don’t wait; there will not be another opportunity to attend training until 2014.

Please contact Becky Best at rbest@carf.org or (866) 888-1122, extension 5004, for additional information.

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Washington, D.C., Office Move

On May 11, CARF staff members in Washington, D.C., moved the CARF–CCAC office to Suite 410 in the same building.

Except for the changed suite number, all other contact information, including the street address, zip code, email, and telephone and fax numbers, remained the same. The lease has ended on our current suite, and we are pleased that our new suite will more effectively meet

our workplace needs while keeping us in the same building.

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2012 Standards Manuals Effective July 1, 2012

The 2012 CARF–CCAC and Aging Services standards manuals are now available. Be sure to keep up to date with the changes made from the previous standards manual versions. If you have any questions or do not have the 2012 standards manual, please contact CARF–CCAC toll free at (866) 888-1122.

Updates to the standards manuals

As always, the CARF–CCAC and Aging Services team strives to incorporate field comments and streamline standards whenever possible. For details regarding standards changes between 2011 and 2012, please review the “Changes in the 2012 Manual” section located on page 27 of the manuals.

We strongly encourage you to review the section of the manual titled “Accreditation Policies and Procedures,” as this information is subject to annual updates and accredited organizations are required to adhere to CARF–CCAC and Aging Services policies and procedures.

When do these manuals go into effect?

These manuals are used for all on-site surveys (originals and resurveys) scheduled between July 1, 2012, and June 30, 2013.

If your organization is accredited and you will not have a survey conducted between July 1, 2012, and June 30, 2013, CARF–CCAC and Aging Services indicate that your organization should maintain conformance to current standards, policies, and procedures. Please thoroughly review the appropriate manual so that your organization can remain current on the standards implementation.

Additional CARF–CCAC and Aging Services information

To participate in 2012 education on the standards and accreditation process, please visit www.carf.org/events. If you have any questions, please contact CARF–CCAC toll free at (866) 888-1122, and we will gladly assist you.

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Transforming Outcomes Data into Management Information Institute

With the release of the 2012 Aging Services and CARF–CCAC edition of the standards manuals came some changes to the Performance Measurement and Management (section 1.M.) and Performance Improvement (section 1.N.) sections of the manuals. It's important for providers to take note of following:

- Section M now begins with a standard that prompts the organization to have a written description of its performance measurement and management system. This change provides the organization with an opportunity to consider and then write down key information that helps to define the system.
- Section N now emphasizes that the annual performance analysis is conducted in writing. Having the analysis in writing can be a useful review for the organization.
- The standards in Section N related to communicating performance information have been revised to offer the organization flexibility to communicate performance information according to the needs of the specific stakeholder group while continuing to address format, content, and timeliness of the information communicated.

Considering these changes, many of the themes will stay the same. Section M continues to address the systems that organizations use to collect their data, and section N continues to address how the data tie to performance improvement.

Additional education is available in the form of a three-day training institute, Transforming Outcomes Data into Management Information Institute, which takes you through the steps required to plan and conduct a program of outcomes management and quality improvement, including:

- Outcomes system design and data collection.
- Data analysis, interpretation, and management reporting.
- Identification of areas for quality improvement activities based on findings.

This institute can give you a hands-on approach to proficiency training for analysis and interpretation of outcomes data. Sample outcomes data and off-the-shelf software are used to teach skills needed to develop an outcomes program consistent with the CARF standards. The training institute includes different computer lab groups to meet the learning needs of participants with a broad range of computer and data analysis expertise.

The Transforming Outcomes Data into Management Information Institute is appropriate for administrators, data managers, directors of quality improvement, program managers, information management specialists, and direct service providers. It is useful for both the quality improvement (or data) manager and executive director or decision maker to attend. The institute is also applicable to all CARF–CCAC and Aging Services programs, including adult day services, assisted living, person-centered long-term care communities, home and community services, and continuing care retirement communities.

The next Transforming Outcomes Data into Management Information Institute takes place June 28–30, 2012, in Cambridge, Massachusetts. There are only a few spaces left so register now. For more information or to register, visit our website at:

www.cvent.com/events/2012-transforming-outcomes-data-into-management-information-institute/event-summary-d8c3e53af3a243d894a5cd3315abfdf4.aspx

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Upcoming Events

- [LeadingAge PA Annual Conference & Exposition](#) session, June 27–29, 2012, Hershey, Pennsylvania. Session 38-F. Integrated Care Networks, co-presented by Jeffrey Boland, Partner, Reinsel Kuntz Leshner, LLP (FAP member); James Peiffer, Senior Vice President, Presbyterian SeniorCare; and Sue Matthiesen, Managing Director, Aging Services, CARF.
- [Frequently Cited Standards/Conformance Issues and Trends](#) webinar, July 12, 2012, 1–2:30 p.m. EDT. This webinar will be co-presented by Nora Adelman, Director for Policy, Planning and Administration at The Kendal Corporation and CARF staff to provide multiple perspectives on recurring standards conformance issues and trends that accredited CARF–CCAC and Aging Services organizations have experienced.
- [CARF–CCAC 2012 Financial Ratios and Trend Analysis](#) webinar, September 20, 2012, 1 p.m. EDT. This webinar, co-presented by CARF staff and FAP members Michael Kelly, Managing Director, Zeigler Capital Markets – Southeast, and Andrew Nesi, Senior Vice President, Herbert J. Sims & Co., Inc., will offer the first look at the findings in the 2012 Financial Ratio and Trend Analysis publication.
- [CARF 101 for Aging Services](#), September 5–6, 2012, Hershey, Pennsylvania. This two-day workshop is designed for organizations that are seeking CARF accreditation for the first time or preparing for reaccreditation.
- [NADSA 2012 Annual Meeting](#), September 22, 2012, Pittsburg, Pennsylvania. CARF–CCAC FAP member Jeffrey Boland, Partner, Reinsel Kuntz Leshner, LLP, will be presenting a session called “Are We Measuring Up? Operational and Financial Benchmarks.” Exhibit booth will be staffed by Sue Matthiesen, Managing Director, Aging Services, CARF.
- [AHCA/NCAL 63rd Annual Convention & Exposition](#), October 7–10, 2012, Tampa, Florida. Exhibit booth # 1807 will be staffed by Sue Matthiesen, Managing Director, Aging Services, CARF.
- [2012 LeadingAge Annual Meeting & Exposition](#), October 21–24, 2012, Denver, Colorado.
 - CARF–CCAC FAP member Jeffrey Boland, Partner, Reinsel Kuntz Leshner, LLP, will be presenting the session “Financial Planning for Home and Community-Based Services.”
 - CARF–CCAC FAP member Jeffrey Boland, Partner, Reinsel Kuntz Leshner, LLP, will be presenting the session “Financial Indicators for Adult Day Services.”
 - The “Financial Ratios for CCRCs: Using Data for Planning and Improvement” session will be co-presented by FAP members Michael Kelly, Managing Director, Ziegler, Capital Markets – Southeast; Timothy Myers, CFO, The Kendal Corporation; and Mark Ross, Partner and Practice Leader, ParenteBeard LLC.
 - Exhibit booth will be staffed by Sue Matthiesen, Managing Director, Aging Services, CARF.

If you have suggestions for content to be included in a future issue of Continuing Communication, please email the editor, Rebecca Best, at rbest@carf.org.

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www.carf.org/aging

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