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2013 Standards Manuals Now Available

CARF-CCAC and Aging Services staff is pleased to inform you of the availability of the 2013 CARF-CCAC and Aging Services standards manuals and survey preparation workbooks.

These publications are available for purchase at www.carf.org/catalog (in Canada at www.carf.org/catalogue).

When do these manuals go into effect?

- These manuals are used for all on-site surveys (originals and resurveys) scheduled between July 1, 2013, and June 30, 2014.
- If your organization is accredited and you will not have a survey conducted between July 1, 2013, and June 30, 2014, 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 implementation of standards.

Updates to the standards manuals

The CARF-CCAC and Aging Services team strives to incorporate field comments and streamline standards whenever possible. For details regarding standards changes between 2012 and 2013, please review the "Changes in the 2013 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.

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Lender Website Available Regarding Value of Accreditation

Lenders can use CARF accreditation as a way to identify that a provider organization is well prepared and therefore better able to meet the terms of a lending arrangement because the organization has applied comprehensive accreditation standards to its business and service delivery practices.

CARF–CCAC’s Financial Advisory Panel (FAP) initiated this project and is pleased to offer an information page on our website specifically aimed at the information needs of lenders as they work with aging services organizations to provide capital for major projects.

An accredited organization that is seeking funding from a bank, investor, or other lender, can use this new online tool during a Request for Proposal (RFP) or feasibility presentation to lenders to help:

- Improve the borrowing terms for your organization.
- Explain accreditation and what it means to lenders.
- Demonstrate how accreditation makes your organization more accountable, stable, and viable in the long term.

Simply provide the following URL to potential lenders and add it as a “favorite” in your browser: www.carf.org/lenders.

Please direct any feedback regarding the effectiveness of this tool to the CARF Aging Services team at as@carf.org.

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Congratulations to the 2013 Surveyor Training Class

This past February, aging services professionals from CARF-accredited organizations across the United States and Canada gathered for a two-and-a-half day training in CARF’s Tucson office, covering the CARF survey process and techniques for effective surveying. The trainees were joined by four of CARF’s experienced surveyors who served as mentors: Kevin McLeod, president and CEO of Carolina Meadows; Nora Adelman, director for policy, planning, and administration for The Kendal Corporation; George Grant, a consultant for Arete Human Resources; and Jed Johnson, director of the National Veteran Caregiver Training Program for Easter Seals. The mentors provided the surveyor trainees with guidance, expertise, and support throughout the training process.

Adelmann, a veteran mentor, stated, “This was my first experience being in the CARF Tucson office. CARF President/CEO Brian Boon and other CARF staff made a point of greeting each of us and making us feel welcome. Customer service at its best! The training, with its simulated site visit experiences, really gives the trainees an idea of what a real site visit will be like. The CARF staff models the behaviors it expects during surveys and emphasizes continuing learning and improvement by receptiveness to feedback from all. I always learn, both from staff and from prospective team members.”

Surveyors are at the core of the CARF peer-review process. As surveyors, these professionals use a consultative approach to assess conformance to CARF’s accreditation standards through the on-site survey process.

CARF surveyors gain substantial benefits for themselves, their organizations, and the field, including an opportunity to learn from other providers, a chance for professional networking, complimentary registration for 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 not only benefits by having a staff member who is up to date with CARF information, but also offers a unique professional development opportunity for personnel who use the surveyor role to gain exposure to national and international trends in the field by surveying other organizations.

Aging services surveyor training for 2014 will tentatively be held in Tucson, Arizona, February 26–28. 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 2014 surveyor training is October 24, 2013.

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



Above: Aging Services and CARF–CCAC mentors in the February 2013 new surveyor training are, left to right, Kevin McLeod, Jed Johnson, Nora Adelmann, and George Grant. (Photo by Stephanie Craddock)

FAP Member Highlight: Dave Bond, F.S.A., M.A.A.A.

With more than 33 years of corporate and consulting experience in healthcare financing issues, Dave Bond has served two separate terms as a member of CARF–CCAC’s FAP. The first term was served during his time as a senior consulting actuary with Ernst & Young and the current term as the managing partner of CCRC Actuaries, LLC.

As a member of the FAP, Bond enjoys the interaction and varying opinions between the professionals and many disciplines represented on the FAP. He highly values the interaction of the group, with each member contributing what each perceives to be best practices in the senior living sector. The FAP essentially blends these viewpoints of the market, with industry professionals and providers adapting standards that are critical to our central mission of accreditation benchmarks and review.

As the industry continues to evolve and identify where it needs to go in terms of the mission to provide the best care to the customer, it also needs to balance retaining financial solvency. “Without question,” Bond remarks, “the CCRC industry was hit hard by the downturn of the underlying real estate markets, but the worst seems to be behind us.” In his opinion, the interesting outcome of these challenges is how some organizations have successfully weathered the storm and others have faltered. The common theme of successful organizations, he believes, is their ability to recognize that their customer has changed and that what may have worked well in the past is no longer effective. “Our customer has changed and we need to recognize that change in what we offer our customers, because if we don’t, someone else will.” He notes that this evolution of the customers’ needs will continue to occur and that it will be up to the industry to adapt to the changing needs.

Bond notes that one example of how the industry has been changing is the Life Care at Home (LCAH) product that many CCRCs are currently adding as part of their services to older adults. “CCRCs expend a tremendous amount of resources to engage the 2 percent to 6 percent of the elderly who will ultimately become a resident,” Bond notes. “The LCAH product broadens the potential market and allows an organization to expand its mission to those who are interested in the financial security that the CCRC provides in the event of long-term healthcare, but simply do not want to move into the community until they feel they have to.” Bond states, “Plenty of CCRCs will financially survive and thrive using today’s Life Care products.” He believes that the LCAH concepts that are already in the marketplace will also evolve, noting that most models today assume ultimate membership of around 200 members. “I wouldn’t be surprised if we find CCRCs serving more people in the surrounding community than they do as residents.” Although it is well documented that the product is rapidly growing, the single most confident aspect of LCAH, Bond notes, is that there is no doubt the product will continue to evolve as the industry comes to know what the market demands.

Prior to founding CCRC Actuaries in 2000, Bond served as an actuarial and healthcare consultant for Ernst & Young, where he was involved in a broad range of actuarial and financial feasibility analysis for the industry. As the managing partner of CCRC Actuaries, he

has directed actuarial analysis for the CCRC industry and worked with long term care insurance clients. He has also served as the actuary for state self-funded health plans, State Children's Health Insurance Program, and high-risk pools, and most recently developed the actuarial assumptions and model for a state health insurance exchange as mandated under the Affordable Care Act.

For more information about CCRC Actuaries or Dave Bond's background, please visit www.ccrcaactuaries.com/resumes.html.

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2013 CARF–CCAC and Aging Services Educational Opportunities

May 7: 1–2:30 PM EDT Aging Services and Continuing Care Accreditation Commission Webinar: Introduction to Financials

This webinar will be co-presented by FAP members Michael Flynn, vice president and chief financial officer at Friendship Senior Options; Andrew Nesi, executive vice president at Herbert J. Sims & Co., Inc.; and CARF staff. As a participant, you will learn what a financial statement, audit, financial review, and compilation look like and the distinguishing features of each. In addition, we will discuss the elements of interim financials, statements of operations, and statements of cash flows. Learn definitions of key financial terminology, receive insight from financial professionals, and obtain an introduction to financial indicators. Aging services providers who are looking for basic understanding of financial statements and how to use financial information for effective management are encouraged to participate.

Please note: NAB credits have been approved for this webinar. More information will become available one week before the webinar.

[Register here for this event](#)

May 23: 1–2:30 PM EST Webinar: Cultural Competency and Diversity Planning

Co-presented by Dawn Redfield, resource specialist for Employment and Community Services, and other CARF staff, this session will provide a high level overview of the practical application of CARF's standards regarding cultural competency and diversity planning. During this webinar, you will learn about the key elements that need to be considered when conducting an assessment of an organization's internal and external community. Emphasis is placed on sharing examples of ways an organization can demonstrate an awareness of, respect for, and attention to the diversity of the people with whom it interacts. Administrators of organizations who are seeking accreditation for the first time or preparing for resurvey are encouraged to participate.

[Register here for this event](#)

**July 11: 1–2:30 PM EST Aging Services and Continuing Care Accreditation
Commission Webinar: Changes to CARF’s Aging Services Standards**

This session, presented by CARF–CCAC and Aging Services Managing Director Sue Matthiesen, will provide an overview of any changes to the ASPIRE to Excellence standards, which are the business practices that include areas in leadership, governance, strategic planning, input from persons served, legal requirements, financial planning and management, risk management, health and safety, human resources, technology, rights of persons served, accessibility, information measurement, and performance improvement. Managers of aging services organizations who are seeking accreditation for the first time or preparing for resurvey are encouraged to participate.

[Register here for this event](#)

September 16 & 17, Baltimore, MD

AS 101: Preparing for Successful Accreditation in Aging Services

This engaging two-day session provides a solid foundation for organizations seeking CARF accreditation. Participants will gain valuable insight into the accreditation process as well as helpful information in preparing for the survey and how to avoid the pitfalls some organizations may experience on their survey.

Session topics include:

- The CARF accreditation process and what happens during a survey.
- Helpful tips in preparing for your CARF survey.
- A review of the 2013 standards, including the ASPIRE to Excellence quality framework, designed to provide a logical, action-oriented approach to quality improvement.
- A review of program standards for aging services programs.
- Frequently cited standards.

This session is highly recommended for any first-time organization preparing for the accreditation survey process, organizational contacts new to the CARF accreditation process, or those who need a quick update and refresher course.

Registration information coming soon.

**September 19: 1–2:30 PM EDT Aging Services and Continuing Care Accreditation
Commission Webinar: Financial Ratios and Trend Analysis**

This webinar will be co-presented by FAP member Michael Kelly, managing director at Ziegler Capital Markets – Southeast; FAP member Mark Ross, partner and practice leader at ParenteBeard LLC; and CARF staff to offer the first look at the findings in the 2013 Financial Ratios and Trend Analysis

publication. Through this webinar, you will:

- Study key financial ratios and learn how they help CCRC managers assess organizational effectiveness.
- Understand why ratios should be an integral part of any continuous performance improvement system, strategic planning effort, and resource allocation process.
- Recognize how financial ratios can be used as scorecards to communicate management successes to CCRC leadership, personnel, and persons served.

Registration information coming soon

November 5: 1–2:30 PM EST Aging Services and Continuing Care Accreditation Commission Webinar: Facilitating Smooth Transitions and Preventing Avoidable Hospitalizations

This session will provide insights regarding strategic management considerations, performance measures, and care delivery approaches to improve the quality of transitions and reduce avoidable hospitalizations in multiple types of U.S. care and service settings. Emphasis will be placed on opportunities and threats to improving care transitions for older adults receiving long-term services and supports. Understand how a growing emphasis on examining adverse events and hospital admissions data may impact future payment systems. This webinar will be co-presented by FAP member and CARF surveyor Michael Flynn, vice president and chief financial officer at Friendship Senior Options; FAP member Amy Hayman, managing director at Cain Brothers & Company; CARF surveyor Deborah Youngquist, director, quality management and rehabilitation services at Maryland General Hospital; and CARF staff. Managers of aging services organizations who are seeking accreditation for the first time or preparing for resurvey are encouraged to participate.

Registration information coming soon.

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Upcoming Events

We look forward to seeing you at these upcoming events:

[Ontario Long Term Care Association \(OLTCA\) and Ontario Retirement Communities Association \(ORCA\)](#) present *Together We Care: Convention and Trade Show* April 7–9 at the Metro Toronto Convention Centre in Toronto, ON

CARF representatives: Stephanie Craddock, resource specialist, Aging Services, and Dawn Pickering, business development executive, CARF Canada

[Ontario Association of Non-Profit Homes and Services for Seniors \(OANHSS\)](#) presents its Annual Meeting & Convention April 29–May 1 at the Westin Harbour Castle Hotel in

Toronto, ON

CARF representative: Dawn Pickering, business development executive, CARF Canada

[Assisted Living Federation of America \(ALFA\)](#) presents its 2013 Conference & Expo May 6–9 in Charlotte, NC

CARF representative: Sue Matthiesen, managing director, Aging Services and CARF–CCAC

[Ontario Home Care Association \(OHCA\)](#) presents *Showcasing Our Best – the 2013 Symposium and AGM*: May 23 at the International Centre in Mississauga, ON

CARF representative: Dawn Pickering, business development executive, CARF Canada

[Ontario Association of Community Care Access Centres \(OACCAC\)](#) presents its *Annual Knowledge and Inspiration Conference* June 19–21 at the Westin Harbour Castle Hotel in Toronto, ON

CARF representative: Dawn Pickering, business development executive, CARF Canada

[American Health Care Association/National Center for Assisted Living \(AHCA/NCAL\)](#)

present its Annual Convention & Expo October 6–9 in Phoenix, AZ

CARF representative: Sue Matthiesen, managing director, Aging Services and CARF–CCAC

[National Adult Day Services Association \(NADSA\)](#) presents *Adult Day Services: Pushing Boundaries to Reach New Heights* October 10–12 in Louisville, KY

CARF representative: Sue Matthiesen, managing director, Aging Services and CARF–CCAC

[LeadingAge](#) presents its Annual Meeting & Expo October 27–30 in Dallas, TX

CARF representative: Sue Matthiesen, managing director, Aging Services and CARF–CCAC

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

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www.carf.org/aging

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