



# Continuing Communication

## Volume 3, Issue 1

*An electronic newsletter specifically designed for CARF-CCAC-accredited organizations*

### **Promote Your CARF or CARF-CCAC Accreditation to Attract Quality Leads**

Online marketing is increasingly important as providers look for more cost-effective ways to increase occupancy. Consumers and professionals (e.g., geriatric care managers, social workers, case managers, elder law attorneys, and information/referral specialists) use [SNAPforSeniors®](#), a comprehensive database of more than 60,000 senior housing listings, to search and screen senior housing and care options.

SNAPforSeniors is more than one website. It is a network of [Alliance](#) partner websites with a broad, national reach to over nine million users each month.

### **Distinguish your SNAPforSeniors listing from other organizations**

Leverage your CARF or CARF-CCAC accreditation. Fill out a free [SNAP-Profile™](#) and your CARF or CARF-CCAC accreditation seal will appear on your detailed listing to inform users that your community represents quality.

Call (206) 575-0728 and press “1” or e-mail [service@snapforseniors.com](mailto:service@snapforseniors.com) to learn more.

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### **Who Should Be Involved in the Accreditation Process...and How?**

Involvement of persons served (i.e., residents, program participants, or clients) in the accreditation process on an ongoing basis is tremendously valuable to embedding accreditation standards in operations and revealing not only where an organization is exceeding or meeting standards, but also identifying areas for improvement. Customer-service-related research in various business sectors also supports the notion that engaging individuals in strategies, products, and services that are important to them will enhance not only satisfaction, but also quality.

A pitfall that some organizations involved in accreditation can experience is the notion that the accreditation process is a “staff responsibility.” In fact, accreditation standards are designed to foster ongoing engagement of many important stakeholders such as, but certainly not limited to, program participants, such as residents or



participants, families, governance, owners, referral sources, volunteers, staff at all professional levels, vendors, payers, and others that play a vital role to an organization.

Although there is no “requirement” per se about who must be involved in or be the leaders of an organization’s implementation of accreditation standards during the self-assessment process leading up to and following the on-site survey, the standards themselves prompt persons served and various other stakeholders to be involved for conformance. The standards are also flexible so that various leaders should be engaged.

So, the question arises frequently about how should or could persons served be involved in this process? Although you may think of many creative and meaningful ways for involvement to occur, here are some suggestions:

- Facilitating discussions at organization committee meetings and other group venues regarding those standards that ask for feedback and/or involvement from persons served to assess how these systems are working. This can be done in preparation for the survey, as well as during annual or ongoing reviews of procedures. Persons served can examine how various policies, procedures, and systems for input are made clear to them and whether or not these systems have areas for improvement.
- Testing the clarity of emergency and evacuation systems required in health and safety standards and assisting with updating unclear or inaccurate information or processes.
- Reviewing tools such as surveys and questionnaires that are used by the organization to gather input for performance improvement to determine if the tools are clear and accessible to users. This will assist with ensuring reliability and validity of data collection systems.
- Discussing rights-related information that is made available by the organization to persons served and analyzing whether it makes sense to persons served and others involved in key decisions. If there are areas identified as unclear or outdated, the organization can update information accordingly.
- Assisting with development of the agenda for the on-site survey visit.
- Identifying individuals or groups that the surveyors can interview during their visit to gain insight regarding conformance to standards.
- Leading the tour of the campus during the on-site survey. Based on the size or structure of the organization, the tour guides may even be a team of people.
- Strategizing with the organization’s marketing or outreach personnel to determine the most efficient and valuable ways to promote the organization’s achievement of accreditation in order to reach out to other



potential persons served who may be interested in receiving services from, or residing in, an organization that conforms to international accreditation standards.

- Communicating to elected officials about the organization's achievement of accreditation in order to publicly support positive aspects of our field and preempt unnecessary regulations.

Although this list includes various suggestions for how an organization can involve persons served in accreditation, there are many other examples that can enhance the value and recognition of accreditation on an ongoing basis. Persons served and other stakeholders are vital to our work every day, so it makes sense to maximize their engagement in this important process to sustain use of comprehensive standards specific to our field.

For additional ideas on how various stakeholders can and should be involved in the accreditation process, please contact CARF's Aging Services staff at (866) 888-1122.

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### ***Survey Prep Live!***

CARF-CCAC will be offering a coaching resource titled *Survey Prep Live!* on a quarterly basis throughout the year. This coaching resource provides an extra edge for those preparing for their next accreditation survey. Survey Prep Live is a complimentary resource that highlights different sections of the standards manual and accreditation process in a series of convenient online meetings presented by a resource specialist.

The series of five topical areas will be repeated each quarter in 2010.

#### **Second Quarter Dates\***

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|---------|--|
| June 1  | How to Get Started                     |
| June 8  | ASPIRE® Overview                       |
| June 15 | Accessibility and Health & Safety      |
| June 22 | Performance Improvement                |
| June 29 | The Care Process (standards section 2) |

*\*Topics repeat in the same series each quarter. For additional dates, please visit [www.carf.org/aginglive](http://www.carf.org/aginglive).*



These complimentary online technical assistance sessions are a convenient way to access the support provided by your dedicated CARF resource specialist and provide an excellent opportunity for you to benefit from the question-and-answer discussion with your colleagues.

### ***Survey Prep Live! Benefits***

Your organization will benefit greatly from this coaching tool, whether you are seeking accreditation for the first time or are preparing for reaccreditation.

- Stay informed about new and updated standards and policies.
- Discover practical tips on survey preparation.
- Benefit from the experiences of other organizations.
- Gain individualized technical assistance for your team.

For more information about *Survey Prep Live!*, call (866) 888-1122 or visit [www.carf.org/aginglive](http://www.carf.org/aginglive).

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### **Give Back to the Aging Services Field while Gaining Experience at the Same Time**

What does it take to become a CARF surveyor? The answer is simple:

- Five years of experience in aging services.
- Employed by a CARF-accredited organization.
- Commitment to conduct three surveys per year.
- Knowledge of CARF standards.
- Attend CARF Surveyor Training for 2 ½ days

Being a CARF surveyor has many benefits. As a surveyor, you have a chance to contribute to the quality of services while gaining valuable insights from visiting other organizations. It provides opportunities for professional networking and exposure to national and international trends in the field. It can also be a benefit to your own organization by having a staff member who is up to date with changes in the field and the CARF standards.



If you have five or more years of experience in aging services and currently work for a CARF- or CARF-CCAC-accredited organization, we want to hear from you and encourage you to apply.

Applications are accepted all year round. You can apply online at <http://www.carf.org/about/CARF-surveyor-applicant-questionnaire/> or you can contact Rebecca Best, resource specialist in Aging Services at (866) 888-1122, ext. 5004.

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## How Organizations are Dealing with the Economic Climate

How has the current economy affected your organization, and how are you dealing with it? CARF-CCAC has gained some insight into this question. Leaders in the field responded regarding the top challenges and opportunities facing organizations in the aging services arena.

The housing slump resulting in low occupancy is at the top of the list of challenges. Many organizations are changing the way they market their units and are more flexible with their entrance fees. William Starcher, chief financial officer for Medford Leas, stated “We have given incentives, including subsidies and deferring entry fee payment until the sale of their home. It has been successful.”

Judson Services, Inc., in Cleveland, Ohio, has also increased flexibility with its entry fee model. John Jones, administrator, shared “One solution does not fit all...we have some flexibility when working with prospects. Therefore, approaches we have implemented include revisiting pricing of entry fees on some units that haven’t been moving, flexibility in payment of entry fee over six to nine months, increasing number of hours for moving assistance, which Judson pays for, and pricing smaller units on a rental basis rather than entry fee model.”

Another challenge that is a theme with many organizations is expense management addressed by controlling costs and keeping fees affordable. Whether that includes reducing unnecessary expenses or combining roles and responsibilities, organizations continue to explore their options.

Jones stated “Judson has taken a step back to identify inefficiencies and/or redundancy of labor resources. With three campuses, we have moved toward each administrator responsible for all services on his or her campus, which avoids need for an overall corporate function. Environmental services and maintenance management was combined into one role. This allowed an elimination of one manager but added one support services associate. This significantly reduced our labor costs.”

Barbara Thomas, CEO for Kendal at Oberlin in Ohio, said “We have worked harder than ever to scale back unnecessary expenses in our budget process and engage residents in the process of identifying areas of efficiency. It's working....we were able to pass along a 2 percent increase and see most departments be successful in bringing in a 2010 budget with expenses trimmed by as much as 3 percent.”



Kendal is not the only organization that is using improved communication to help with the current economic environment. Starcher acknowledged the challenge many of us are facing in the field of “balancing the economic hardships between the employees and the residents in relation to rate increases and benefits. We have sought buy-in through communication and detailed explanations of these multifaceted challenges. It has helped everyone see multiple perspectives and support openness to change.”

Many organizations, including Kendal at Oberlin, are also “looking at new program development and ways to deliver services in different ways, including outsourcing,” Thomas said.

Judson has also been looking for new revenue opportunities. Jones said “Our biggest opportunity was in dining services. We have made a more valiant effort in external and internal catering sales. We have seen an increased need for providing our services in client’s homes. Therefore, in addition to home care services, we provide other supportive services such as maintenance, billing paying, transportation, and various clinical services.”

Along with many of the steps organizations are taking to weather the economic climate, promoting their accreditation is among them. Thomas shared “Two important benchmarks of outside credibility that serve us well are CARF–CCAC accreditation and having our bonds rated by Standard & Poor’s. Both of these credentials offer strength in the conversation with potential residents as they consider a ‘risk’ to make a move with the economy so unstable.”

Accreditation has helped in other ways as well. When Jones was asked how CARF accreditation has helped his organization, he quoted William A. Foster, who said “‘Quality is never an accident; it is always a result of high intention, sincere effort, intelligent direction, and skillful execution; it represents the wise choice of many alternatives.’ CARF–CCAC accreditation is an intentional, intelligent, wise choice.” Jones went on to say “Accreditation has assisted Judson in improving the quality of services it offers its residents and clients through the standards. The Aging Service Network [ASN] standards have been a tremendous help in guiding us on how the participating providers of our network talk to each other and a more formal approach to the oversight of such.”

Starcher saw accreditation as a benefit on a more personal level as a CARF surveyor stating “Being a surveyor has been helpful. Doing surveys has given me some good ideas as to dealing with challenges. It also has allowed me to give the board perspective as to how we are doing against others and comfort them that we are not unique in our situation.”

Kevin McLeod, CEO for Carolina Meadows in Chapel Hill, North Carolina, stated “Accreditation has created a system of boundaries that we wish to stay within no matter what the economic climate may be. As a result of accreditation, we keep our dashboard front and center with our financial and quality indicators as a guide to maintaining our reputation and managing our operations. Our residents are even stating such things as ‘Well, doesn’t accreditation require that we do this or that?’ and ‘Shouldn’t we make sure that our commitments to



excellence in care and excellence in performance and financial security remain firm?' I think those elements are the most important benefit of accreditation regardless of a good or bad economy."

Although some economic measures are improving, some experts say the financial crisis is far from over. Thomas is keeping this in mind while moving forward. She stated "There is no quick fix; our solution to a changed economy is to learn to live with this for the long haul, which means making thoughtful changes with planning that assures it will not impact or harm our reputation in ways for which we are not prepared."

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### **What is a Staff Coach?**

Each organization that is currently accredited or actively seeking accreditation is assigned a staff coach at CARF whose role is to provide guidance and technical assistance regarding the accreditation process and standards. Your staff coach is available to answer questions in preparation for a survey and throughout the tenure of accreditation. If you do not know who your staff coach is, please contact us at [as@carf.org](mailto:as@carf.org).

Many organizations find it helpful to schedule a conference call with the staff coach to discuss interpretation of standards, what to expect of the on-site survey process, helpful tips for preparing for a survey, or discussion of sections of the standards the organization finds challenging. Other organizations prefer to rely on periodic e-mails or informal calls when specific questions arise.

Finally, your staff coach is also the individual responsible for reviewing documentation related to your accreditation such as the quality improvement plan (QIP), annual conformance to quality report (ACQR), and ongoing communication items. You may receive calls or e-mails from your staff coach reminding you of deadlines, seeking additional information, or offering resources.

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### **2010 Standards Manuals Now Available**

CARF-CCAC and Aging Services staff is pleased to inform you of the availability of the *2010 CARF-CCAC and Aging Services Standards Manuals* and the *2010 Survey Preparation Guides*. These manuals are available for purchase at <http://bookstore.carf.org>

### **Updates to the standards manual**

CARF-CCAC has revised the standards for person-centered long-term care (nursing home) communities, which were originally released in 2006.

In response to development of additional home and community services programs in the field, CARF is pleased to announce that a new set of standards has been developed for home and community services programs. These



new standards have been included in your manual because organizations may be interested in these standards to accredit their home and community service programs simultaneous with other currently accredited programs.

As always, the CARF Aging Services team strives to incorporate field comments and streamline standards whenever possible. For details regarding standards changes between 2009 and 2010, please review the “Changes” section located on page 29 of the manual.

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 does this manual go into effect?**

This manual is used for all on-site surveys (originals and resurveys) scheduled between July 1, 2010, and June 30, 2011.

If your organization is accredited and you will not have a survey conducted between July 1, 2010, and June 30, 2011, CARF–CCAC and Aging Services indicates that your organization should maintain conformance to current standards, policies, and procedures. Please thoroughly review the manual so that your organization can remain current on the standards implementation.

### **Additional CARF–CCAC and Aging Services information**

To participate in 2010 education on the standards and accreditation process, please visit [www.carf.org/aging](http://www.carf.org/aging) and select “Education and Training.” An Aging Services training calendar is posted, along with online registration information.

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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## **State Acceptances Update**

### **Adult Day Services**

#### **Alberta**

Alberta Health Services’ contracted service providers of home care services (i.e., home care, personal and technical services, community rehabilitation, assisted living, day programs, and respite care) must be accredited by an approved body (including CARF) by September 2010.

**Iowa**

If an adult day services program is accredited by CARF, it will be accepted as the basis for state certification.

**Nebraska**

The state may deem adult day services in compliance with state standards based on accreditation by CARF.

**North Carolina**

Enrolled Medicaid providers of adult day health services must achieve national accreditation.

**Assisted Living****Alberta, Canada**

Alberta Health Services' contracted service providers of home care services (i.e., home care, personal and technical services, community rehabilitation, assisted living, day programs, and respite care) must be accredited by an approved body (including CARF) by September 2010.

**Arizona**

If a licensee submits a healthcare institution's (assisted living facility's) current accreditation report from a nationally recognized accrediting organization, the state shall not conduct an on-site inspection of the healthcare institution as part of the substantive review for a renewal license.

**Iowa**

The state shall accept CARF accreditation in lieu of state certification.

**Maryland**

The state may accept all or part of a report of an approved accrediting organization as meeting the state licensing requirements for the renewal of a license to operate an assisted living facility program.

**Nebraska**

State may deem licensee in compliance with state rules if accredited as assisted living facility by recognized accreditation body.

**Texas**

The Department of Aging and Disability Services (DADS) shall accept an accreditation survey from CARF instead of an inspection, an annual inspection, and in satisfaction of the requirements for certification by DADS for participation in the medical assistance program and the federal Medicare program.



## Home and Community Services

### Alberta, Canada

Alberta Health Services' contracted service providers of home care services (i.e., home care, personal and technical services, community rehabilitation, assisted living, day programs, and respite care) must be accredited by an approved body (including CARF) by September 2010.

### Person-Centered Long-Term Care Community

#### Ontario, Canada

The Ministry of Health and Long Term Care pays a per bed/per day premium to Long-Term Care providers that are accredited by an approved accreditor (including CARF).

### Continuing Care Retirement Community (CCRC)

#### District of Columbia

To obtain a permanent license, a CCRC must submit prior to opening all reports required by an approved accrediting organization necessary to maintain accreditation.

#### Florida

The state may waive any statutory requirements for an accredited provider if not inconsistent with applicable security protections.

A nursing home satisfies the financial soundness and stability criteria for recognition as a Gold Seal Program facility if it is part of the same corporate entity as a licensed continuing care facility, meets certain minimum liquid reserve requirements, and is accredited by a recognized accrediting organization, as long as the accreditation is not provisional.

The state may waive the quarterly reporting requirement and the tri-annual examination if the facility is accredited.

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## Upcoming Events:

- [Ontario Long Term Care Association and Ontario Retirement Communities Association \(OLTCA\) Convention and Trade Show](#), April 25-27 in Toronto, Ontario. CARF Aging Services will be attending and meeting with stakeholders.
- [Lutheran Services in America \(LSA\) Annual Conference](#), April 26-28 in Sacramento, CA. CARF Aging Services will be exhibiting at the meeting and meeting with stakeholders.



- [North Carolina Association of Non Profit Homes for the Aging \(NCANPHA\) Annual Conference and Trade Show](#), May 10-13 in New Bern, NC. CARF-CCAC will be presenting a session at the meeting titled “Performance Improvement: A Framework for Quality” with John Cowan from Givens Estates and J. Paul Gregg from Glenaire.
- [Assisted Living Federation of America \(ALFA\) 2010 Meeting and Expo](#), May 25-27 in Phoenix, AZ. CARF Aging Services will be presenting a session at the meeting titled “Positive State Regulatory Outcomes.” Staff will also be exhibiting and meeting with stakeholders.
- [Ontario Association of Non-Profit Homes and Services for Seniors \(OANHSS\) Annual Meeting and Convention](#), June 7-9 in Toronto, ON. CARF Aging Services will be attending and meeting with stakeholders.
- [Pennsylvania Association of Non Profit Homes for the Aging \(PANPHA\) Annual Conference and Exposition](#), June 22-25 in Hershey, PA. CARF-CCAC will be presenting a session at the meeting titled “Striving for Excellence” with Joe Swartz and Bruce Hartshorne from Tel Hai Retirement Community. Current and former Financial Advisory Panel (FAP) members Jeff Boland, ParenteBeard, LLC and Aaron Rulnick, HJ Sims will be presenting a session titled “Financial Strategies for Today’s Changing Environment.” Staff will also be exhibiting and meeting with stakeholders.