

# Continuing Communication

## Aging Services News

carf INTERNATIONAL

Volume 10, Issue 3

In this issue:

[Welcome New CARF Aging Services Staff](#)

[Congratulations to Aging Services Providers that Earned CARF Accreditation](#)

[Financial Advisory Panel Member Highlight: Bradley Paulis](#)

[Coaching Corner: Ö\[ { \] ^ ¢ } & Æ ^ á Á / æ ä \\*](#)

[Sneak Peek at CARF's Revised Human Resources Standards Coming in 2018](#)

[Upcoming Events](#)

[2017 CARF Aging Services Educational Opportunities](#)

---

## Welcome New CARF Aging Services Staff

As CARF International continues to see growth and diversification of aging services organizations into many types of community-based services, we are pleased to add a new staff member to our team. Sherri Schamel recently joined CARF's Aging Services unit as a resource specialist. She is based in our Tucson, Arizona, headquarters office.



Sherri brings significant experience in areas such as home health care, geriatric care management, end-of-life care, and dementia care practices within various community-based and residential settings. Sherri's depth of professional experience in the aging services profession includes development and management of specialized Alzheimer's programming, caregiver education, training and staff development projects for clinicians, marketing of specialized services, and consulting with organizations on effective service delivery approaches to address complex needs of persons served. Sherri has a master's degree in Social Science Administration from Case Western Reserve University in Cleveland, Ohio and holds certifications in Dementia Care Mapping™, The Eden Alternative®, and Geriatric Care Management.

Sherri can be reached at [sschamel@carf.org](mailto:sschamel@carf.org) or at extension 7102.

[Back to top](#)

---

---

## **Congratulations to Aging Services Providers that Earned CARF Accreditation**

Congratulations to the following providers throughout North America that achieved CARF accreditation during the second quarter of 2017. Each of these providers applied internationally recognized standards and completed an on-site survey conducted by CARF surveyors.



**All Seniors Care Living Centres - Alberta St., Albert, AB**  
**Bennett Village, Georgetown, ON**  
**Bethany Village Retirement Center, Mechanicsburg, PA**  
**Bethell Hospice, Inglewood, ON**  
**Better Living Health and Community Services, Toronto, ON**  
**Crosslands, Kennett Square, PA**  
**Detroit Area Agency on Aging, Detroit, MI**  
**Dufferin Oaks, Shelburne, ON**  
**Heart House Hospice, Mississauga, ON**  
**Huron County Homes for the Aged, Clinton, ON**  
**Kendal at Longwood, Kennett Square, PA**  
**Monroe Village, a Springpoint Community, Monroe Township, NJ**  
**Region of Peel Long Term Care, Brampton, ON**  
**Regional Municipality of York Newmarket, ON**  
**Revera Inc. - ON Multi-levels ,Cambridge, ON**  
**Revera Inc. - Alberta, Edmonton, AB**  
**Revera Inc. - British Columbia, New Westminster, BC**  
**Revera Inc. - ON Central & Ottawa, Nepean, ON**  
**Revera Inc. - ON East, Newmarket, ON**  
**Revera Inc. - ON Southeast & Thunder Bay, Ancaster, ON**  
**Revera Inc. - ON West, London, ON**  
**Springpoint at Crestwood, Inc., Whiting, NJ**  
**Springpoint at Montgomery, Skillman, NJ**  
**Springpoint at The Atrium, Red Bank, NJ**  
**The Estaugh T/A Medford Leas, Medford, NJ**  
**The Hospice of Windsor & Essex County Inc., Windsor, ON**  
**The Pines Long Term Care Home, Bracebridge, ON**  
**West Neighbourhood House, Toronto, ON**

[Back to top](#)

---

## **Financial Advisory Panel Member Highlight: Bradley Paulis**

CARF welcomes Bradley Paulis, partner at Continuing Care Actuaries, to the Financial Advisory Panel (FAP). Continuing Care Actuaries (formerly CCRC Actuaries) was founded in

December 2000 by Dave Bond, an FAP alumnus, and Mr. Paulis. The firm, located in Reisterstown, Maryland, was established to assist clients in managing risks associated with health insurance and long-term care.



Mr. Paulis has more than 26 years of experience providing actuarial consulting services for the healthcare industry. He has provided consultation to 450+ life plan communities (also known as continuing care retirement communities or CCRCs), life care at home programs, long-term care and health insurance entities, and large self-funded health insurance programs. His work focuses on the long-term sustainability of the communities and mitigating inherent risks associated with entrance fee contracts.

Mr. Paulis manages the day-to-day operations of Continuing Care Actuaries. In that role, he focuses on innovation in planning and delivering effective strategies for stakeholders in the healthcare market. For example, he developed a financial forecasting model for life plan communities and at-home programs and has assisted state agencies in evaluating feasibility submissions for new and expanding life plan communities. He has also worked with governmental stakeholders by helping develop a healthcare exchange under the Affordable Care Act and evaluating the actuarial liability for the Department of Defense.

CARF asked Mr. Paulis about the topics addressed by CARF standards and how they benefit his clients:

“The CARF CCRC standards are extensive and reach into every aspect of a community’s operation. This attention to detail enables a community to be prepared to address adverse experience when it occurs, and our industry has seen many forms of adverse experience, from the real estate crisis to the caregiver shortage and the increasing age of new entrants.”

CARF also asked Mr. Paulis to comment on his view of accreditation and how it helps to position accredited organizations to be competitive in the healthcare market:

“The clients I work with who have participated in the CARF-accreditation process are sophisticated in their processes and better able to produce the types of reports and financial information integral to benefiting from actuarial consulting. They are engaged, responsive, and better equipped to understand and adapt to the dynamic healthcare market and the future needs of the life plan community.”

Prior to his role as cofounder of Continuing Care Actuaries, Mr. Paulis was a manager in the Baltimore office of Ernst & Young, helping direct the company’s National Long-Term Care practice. He has presented at numerous LeadingAge<sup>®</sup> conferences on topics ranging from financially sound pricing strategies, the evolution of continuing care at home programs, and keys to success. He completed his M.S. and B.S. in mathematics at Bucknell University in Lewisburg, Pennsylvania. He is currently an associate of the Society of Actuaries<sup>®</sup>, fellow of the Conference of Consulting Actuaries, and a member of the American Academy of

## Coaching Corner: Competency-Based Training

What is competency-based training?

Competency-based training is defined by the CARF standards manual glossary as, “An approach to education that focuses on the ability to demonstrate adequate skills, knowledge, and capacity to perform a specific set of job functions.”



Competency-based training may have originated from the concept of Andragogy, the theory for adult learning introduced by Malcolm Knowles (1913-1997), an American educator best known for his focus in this area. Knowles' theory was based around assumptions that a person becomes more self-directed as he/she matures, accumulating significant experiences that become resources for learning. Knowles reasoned that, as a person matures, his/her reference for learning changes from subject centered to problem centered, and he/she therefore learns best when the subject is of immediate value.

Andragogy has four basic principles:

- Adults need to be involved in the planning and evaluation of the instruction.
- Experience provides the basis for the learning activities.
- Adults are most interested in learning subjects that have immediate relevance and impact to their job or personal life.
- Adult learning is problem centered rather than content oriented.

Stemming from the theory of Andragogy, the focus of competency-based training is on real problems, rather than abstract concepts. It requires staff members to demonstrate that they have the knowledge to complete a specific task. In this type of training, skills are converted into specific situations or tasks in which that skill is needed. Success of the training is measured by the trainee being able to demonstrate the skill.

### Tips for conducting competency-based training

- Training may include “demonstration and return demonstration” in which the trainer demonstrates a skill (such as using a fire extinguisher or other equipment) and the trainee performs the same skill in return to ensure competency.
- Case studies and online learning may supplement in-person demonstrations.
- Training may involve a “skills day” during which all staff members visit various skills stations to learn specific skills and demonstrate them back to a trainer.
- A written quiz or assessment can follow a training presentation to ensure that key concepts are understood. Verbal quizzes in which the trainee describes to the trainer how he/she would respond in an emergency may also be useful in assessing

competencies.

- Written records of the dates of training, content of the training, and attendees of the training should be kept.

### **Quick Reference**

Required competency-based training standards in the 2017 Aging Services and Continuing Care Retirement Community Standards Manuals:

#### **Section 1 Standards – Health and Safety**

1.H.4. - Documentation of competency-based training in health and safety for personnel both upon hire and at least annually

#### **Section 2 Standards – Care Process for the Persons Served**

2.A.52. - Documented competency-based training for personnel that includes issues related to persons served with dementia, as identified in the standard

2.A.53. - Documented competency-based training for volunteers that includes issues related to persons served with dementia, as identified in the standard

2.A.59. - Documentation of competency-based training for personnel who provide services related to skin integrity and wound care, provided at orientation and regular intervals

#### **Section 3 Program Specific Standards – Person-Centered Long-Term Care Community**

3.C.24. - Documented competency-based training for personnel

#### **Section 4 Specialty Population Designation Standards – Dementia Care Specialty Programs**

4.A.7. - Documented competency-based training for volunteers that includes issues related to persons served with dementia, as identified in the standard

4.A.15. - Documented competency-based training for personnel that includes issues related to persons served with dementia, as identified in the standard

#### **Andragogy references:**

##### **The Adult Learning Theory - Andragogy - of Malcolm Knowles**

<https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles>

##### **The Evolution of Competency Based Training in Healthcare**

<http://blog.lambdasolutions.net/the-evolution-of-competency-based-training-in-healthcare>

##### **Andragogy (Malcolm Knowles)**

<http://www.instructionaldesign.org/theories/andragogy.html>

##### **Theory of Andragogy**

[http://web.utk.edu/~start6/knowles/malcolm\\_knowles.html#H2](http://web.utk.edu/~start6/knowles/malcolm_knowles.html#H2)

[Back to top](#)

---

# Sneak Peek at CARF's Revised Human Resources Standards Coming in 2018

Health and human services organizations rely on personnel to provide high-quality programs and services and meet business targets. Through CARF's standards revision work, it has become increasingly evident that, to be well prepared for change, an organization should be able to articulate its workforce strategy. It should be able to align robust practices to enhance its intellectual capital. It is important that CARF standards reflect workforce practices that are efficient, flexible, and outcomes focused.

To this end, CARF will release a revised human resources section of standards in 2018 to provide organizations with flexible approaches that support strategic workforce development and management practices. The revisions of the human resources standards have already gone through a field review process, which resulted in very positive feedback regarding the increased relevance and flexibility offered by the new standards.

The revised standards will shift slightly to emphasize topics such as:

- Ongoing strategic workforce planning.
- Verification of personnel backgrounds, credentials, and fitness for duty.
- Onboarding and ongoing workforce engagement supported by clear policies and internal communication approaches.
- Personnel competencies that align with the mission and direction of the organization.
- Performance appraisal mechanisms that reflect new evidence of the benefits of real-time communication and flexibility.
- Succession planning.

Look for more information and education programming throughout 2017 and 2018 on the new human resources standards.

[Back to top](#)

---

## Upcoming Events

### September

**Falls Prevention Awareness Day** (September 22, 2017) (USA) – designated by the National Council on Aging – [www.ncoa.org/healthy-aging/falls-prevention/falls-prevention-awareness-day](http://www.ncoa.org/healthy-aging/falls-prevention/falls-prevention-awareness-day)

**World Alzheimer's Month** – designated by Alzheimer's Disease International – [www.alz.co.uk/world-alzheimers-month](http://www.alz.co.uk/world-alzheimers-month)



### October

**National Seniors Day** (October 1, 2017) – designated by the Canadian Government –

[www.canada.ca/en/employment-social-development/corporate/seniors.html](http://www.canada.ca/en/employment-social-development/corporate/seniors.html)

**International Day of Older Persons** (October 1, 2017) – designated by the World Health Organization – [www.who.int/ageing/events/idop\\_rationale/en/](http://www.who.int/ageing/events/idop_rationale/en/)

**World Mental Health Day** (October 10, 2017) – designated by the World Health Organization – [www.who.int/mental\\_health/world-mental-health-day/en/](http://www.who.int/mental_health/world-mental-health-day/en/)

**World Arthritis Day** (October 12, 2017) – coordinated by the European League Against Rheumatism – [www.worldarthritisday.org](http://www.worldarthritisday.org)

**World Stroke Day** (October 29, 2017) – coordinated by the American Heart Association/American Stroke Association – [www.heart.org/HEARTORG/General/About-Us---American-Heart-Association\\_UCM\\_305422\\_SubHomePage.jsp](http://www.heart.org/HEARTORG/General/About-Us---American-Heart-Association_UCM_305422_SubHomePage.jsp)

**Residents' Rights Month** (USA) – designated by the National Consumer Voice for Quality Long-Term Care – <http://theconsumervoice.org/home>

## **November**

**National Alzheimer's Disease and Awareness Month** (USA)– designated by the Alzheimer's Association – [www.alz.org/co/in\\_my\\_community\\_alzheimers\\_awareness\\_month.asp](http://www.alz.org/co/in_my_community_alzheimers_awareness_month.asp)

**Fall Prevention Month** (Canada) – coordinated by the Partners for Fall Prevention – <http://fallpreventionmonth.ca/about>

[Back to top](#)



## **2017 Aging Services Educational Opportunities**

### **Webinars**

November 9

#### **Introduction to CARF Aging Services (Canada)**

*To help your organization become familiar with the CARF-accreditation process, CARF is offering this complimentary webinar. Attend to receive an*

introductory look at what CARF is, how the survey process works, and the benefits of accreditation. We invite staff and management from organizations of all sizes and types, including Adult Day Services, Networks, Retirement Homes, Long-Term Care Homes, Home Care, and Supportive/Independent Senior Living.

To register, email [CARFCanadaTeam@carf.org](mailto:CARFCanadaTeam@carf.org)

November 14

**2017 Results: Financial Ratios and Trend Analysis of CARF-Accredited CCRCs**

*During this 90-minute webinar, experts will discuss and provide insight on the findings of the financial ratios calculated from FYE 2016 financial statements for both single-site and multi-site US CCRCs. Specific comparative information will be provided based upon primary contract type and quartile rankings.*

**Registration coming soon**

For further information, please contact the CARF Education and Training Unit at (888) 281-6531. Online registration is available at [www.carf.org/events](http://www.carf.org/events) two to three months prior to an event.

[Back to top](#)

---

If you have suggestions for content to be included in a future issue of *Continuing Communication*, please email the editor, Tonya Tobe, at [ttobe@carf.org](mailto:ttobe@carf.org).

Please include the **carf.org** domain on your safe-senders list to ensure that *Continuing Communication* and other important emails from CARF Aging Services are not blocked by spam filters.

If a lender is interested in the systems you use to manage risk in your organization, support management competencies, measure outcomes, and foster sound business practices, please direct the lender to [www.carf.org/lenders](http://www.carf.org/lenders). The website includes language geared toward lenders, a five-minute webinar to educate them about accreditation for your organization, and a downloadable factsheet with key information about CARF.



[Find us on Facebook](#)



[Follow us on LinkedIn](#)



[Circle us on Google+](#)



[Subscribe to us on YouTube](#)

[www.carf.org/aging](http://www.carf.org/aging)

Know someone who would like to receive our newsletter?  
Friends and colleagues can [subscribe](#) here.