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CCRC Operational Indicator Benchmarking Program

Based on input from accredited continuing care retirement communities (CCRCs), CARF-CCAC is pleased to partner with Cain Brothers and Reinsel Kuntz Leshner (RKL) to offer accredited CCRCs an operational indicator benchmarking program as a complimentary value-add to CARF-CCAC accreditation.

This program was developed based on the interest from the CCRC field in having broad operational performance information to enhance efficiency of operations and compare individual organizations to the field.

The CCRC Operational Indicator Benchmarking Program includes a website from which accredited CCRCs are given members-only access to obtain a downloadable Excel® file into which they can directly enter operational data and calculate specific indicators. The file is then emailed to CARF-CCAC for analysis and benchmarking. CARF-CCAC, along with Cain Brothers and RKL, will then generate individualized reports for each CCRC and an aggregate report for the field. This complimentary program offers accredited CCRCs useful information for operational management and business planning.

Individuals completing and submitting the Excel tool will be entered into a drawing to receive a \$200 Visa® gift card from CARF-CCAC. National benchmark information will be made available free of charge to CARF-CCAC-accredited organizations in the fall of 2013, and all accredited CCRCs submitting this tool will receive a complimentary individualized data report.

Data collected through this tool will be confidential, and only aggregate data will be made available publicly. This benchmarking tool is intended to add value to CARF–CCAC accreditation, so participation is voluntary and does not impact an organization’s accreditation status.

More information regarding this program will be provided to accredited CCRCs throughout the spring and summer.

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Christie Gardens Honors Commitment to Fulfill its Vision

In December 2009, Christie Gardens announced to its stakeholders and to the Ministry of Health of Ontario that it would be withdrawing, by attrition, from the publicly funded Long-Term Care, thereby foregoing hundreds of thousands of dollars in government funding. The organization’s CEO, Grace Sweatman, shared with CARF that this was a controversial decision that was not made lightly.

When an organization like Christie Gardens must make complicated strategic decisions for the population it serves, many CARF standards can help guide management and board members. These areas of the standards include strategic planning, governance, leadership, resident rights, legal requirements, and financial planning. Moreover, when an organization does not engage in a regulatory system that is specifically reviewing certain aspects of care to residents, it is important for an organization to engage in a voluntary performance improvement system such as accreditation to publicly demonstrate its accountability for and commitment to quality. Christie Gardens has therefore demonstrated their ongoing commitment to quality by maintaining their accreditation.

Established in 1984, Christie Gardens is a not-for-profit faith-based community in Toronto that offers multilevel accommodation and services to seniors. In 1997, when the provincial government created Community Care Access Centres (CCACs) to handle long-term care placements, Christie Gardens had to modify the way it operated. As a service provider for a continuum of residential and support services, including long-term care, it would face many challenges with this type of referral system. Its residents could be placed in any long-term care home, regardless of their ties to Christie Gardens. However challenging the situation, Christie Gardens was able to manage for a time under these new rules. It focused its effort on advocacy through its relationships with the new agency and determination to serve its residents on site.

By 2003, ‘Life Lease’, a popular option in which residents purchase a life lease (leasehold) interest in their accommodations, giving them the right to occupy the unit and become part of the community, was added to Christie Gardens. Its success saw an addition to its Independent Living population, making managing under the public healthcare system for its long-term care even more challenging. It became very apparent to the board of directors that this situation would not improve.

After an extensive strategic analysis, the board concluded that, in order to fulfill its mission to provide resident-centered care in a Continuing Care Community where individuals could “age

in place,” the organization would need to become an independent, self-funded service provider.

“We recognized that, in a government-funded system, there could be no privileged access to care, only controlled access. It was imperative to our mission that we have unimpeded access to care so that our residents could be assured that enhanced care services could be provided within their community if and when needed,” said Sweatman.

Although there have been many challenges along the way, three and a half years later Sweatman feels the decision has been positively affirmed. The remaining residents of long-term care were pleased to remain at Christie Gardens, with or without government regulation, and new residents from within the continuum have accepted these services. Occupancy has remained at 100 percent throughout, with a waiting list established.

Sweatman went on to share that she is pleased with the outcomes of this unprecedented decision. Although she is quick to acknowledge there are many advantages to government funding, Sweatman reports that Christie Gardens has appreciated new opportunities since making this decision. “We now operate as a social entrepreneurial business model in a not-for-profit world, marketing our services to the public.”

For Christie Gardens, this marketing reflects a concept that has been a key part of its operation; that is, strategy first, tactics (a close) second. “We identify a need and trend and develop a timely response,” Sweatman stated.

Future programs and services offered within the community are determined by emerging trends and the expectations of its residents. Strategic planning on an active, ongoing basis addresses what the services will be, when they will be needed, and manages the changing demand. All the while, the organization is ensuring that the right resources are available, at the right time, and in the right place.

After reflecting on past experiences, Sweatman shared that she is completely convinced that, if an organization’s vision is clear and owned with passion, it can be achieved. The founders of the organization built Christie Gardens with the vision of establishing a faith-based Continuing Care Community, where individuals could enjoy their final years. The commitment of the board of directors of Christie Gardens, the empowerment of its staff, and the ongoing response to the clear expression of its residents ensure that the vision is a reality today and will be into its future.

Learn more about Christie Gardens at: www.christiegardens.org.

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Financial Advisory Panel (FAP) Member Highlight: Andrew Nesi

In his role as executive vice president at the investment banking firm Herbert J. Sims, Andrew Nesi specializes in senior living finance, although his 25-year healthcare finance experience spans a broad spectrum of both for-profit and not-for-profit healthcare providers, including acute care hospitals, assisted living, memory support, skilled nursing facilities, and CCRCs. With this vast experience, Nesi has had an opportunity to observe many changes in

the field of aging services over the years and offers his unique perspective as a member of the CARF–CCAC FAP.

The CARF–CCAC staff sat down with Nesi and asked him to provide his viewpoint on what he sees as some financial practices that support quality in aging services, what he finds valuable about being involved in the FAP, and what he sees as some important features of today's FAP.

When asked what he sees as the financial practices that support quality in aging services, Nesi notes that management training and succession planning are key elements in the growth and development of aging services organizations. "Organizations have become complex," he remarks. "Many of them are now responsible to a wide variety of constituencies and many levels of care. In order to manage these complex organizations, we need evolving management teams." He observes that, in the past, care and hospitality were the focus of many senior living organizations, but financings and regulatory requirements have become much more complicated. Because of such changes, management teams need different expertise, backgrounds, perspectives, and education in order to become more adept at handling these complexities. Nesi believes that, as a profession, we need to ensure that sufficient education is being provided to leadership staff members to equip them with the knowledge and skills needed to address each of these areas.

Just as management education is crucial to effective leadership in evolving organizations, so is succession planning. Effective succession planning ensures the availability of experienced and capable personnel who are prepared to assume leadership roles as they become available. Nesi remarks that, although having people from within an organization, or from a similar organization, ascend to management positions often works effectively, promoting from within "may lead to organizations becoming insulated" and proposes that it may be beneficial to fill leadership positions from outside the organization and even from outside the field in order to enrich leadership perspectives and drive innovation and creativity.

Nesi goes on to discuss the impact of governance and board involvement on an organization. Historically, many aging services providers have had volunteer boards with members of varied backgrounds. Nesi believes that, although it is important to have volunteer leaders with many years of experience, it is also important for organizations to look for board members who have a breadth of varied professional expertise in current business affairs and who are committed to being involved in boards. Although boards are often engaged with the organization, Nesi questions whether they are consistently challenging the current thinking of the organization or prompting management to explore new ideas. "Successful boards are the ones who are doing this well," said Nesi, noting that strong boards guide successful organizations.

Nesi's final observation regarding the field of aging services is the current marketing message frequently utilized by CCRCs. He believes that CCRCs can benefit from strengthening their message regarding the value and financial security that their organizations provide to persons served. In the past, CCRCs were best identified as an insurance product—people who lived in these communities were protecting themselves from the potentially bankrupting costs of long-term care. In addition, CCRCs were places that could provide a nurturing living environment while the person continued to participate in and contribute to the community at large. This message began to change with the explosion in real estate prices, which led marketing strategies to move away from those core principles

and shift toward promoting a grand lifestyle, where people could have the "biggest and best" of everything with extravagant amenities. This message has led some persons to believe that living in a CCRC is a luxury they cannot afford. On the contrary, Nesi argues, because the future funding of healthcare costs is on the minds of many seniors today, "CCRCs that offer life care products should be places that people are rushing to, not avoiding," he said. He believes that CCRCs need to get this message across by returning to the message of value and financial security while encouraging persons to live in a nurturing environment and participate in the greater community.

As a member of the FAP, Nesi values the opportunity to gather with other professionals in different areas of the field in a venue where they can share their perspectives on the broader view of the market. "It's energizing to have those discussions," he remarks. Nesi believes the strength of the FAP is its focus on staying current in the field and supporting quality practices. Whether it is the standards that are part of the accreditation process or developing consumer guides for persons served, the goal is always to stay current with any changes that have occurred. He states that the FAP "is a living, evolving organism that continues to remain relevant for the people we serve."

For more information about PRU • or Andrew Nesi's background, visit www.hjsims.com/bio/andrew-p-nesi/.

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Congratulations to Quality Award Winners

During this year's Ontario Long Term Care Association (OLTCA)/Ontario Residential Care Association (ORCA) conference "Together We Care," OLTCA continued its tradition of honoring those OLTCA members doing exemplary work in the following areas: safety and quality of care; system integration and sustainability; and resident, family, and staff satisfaction. The awards are designed to celebrate excellence in long-term care and to promote quality improvement, innovation, and collaboration.

We are pleased to recognize those CARF-accredited organizations that were recipients of this honor for 2013:

Leisureworld Vaughan—Recipient of Innovation of the Year—In the fall of 2011, Leisureworld initiated a partnership with Triverity Complete Healthcare Solutions and Roche pharmaceuticals to pilot mobile international normalized ratio (INR) testing at Leisureworld Vaughan. INR is a blood test administered to residents on Warfarin to assess risk of stroke and other side effects. Most homes conduct weekly blood tests, which are subsequently sent to a lab for analysis. Sixteen percent of Leisureworld Vaughan residents were on Warfarin at the time the pilot began. A detailed analysis of the care received by these residents indicated that only 48 percent of INR results were coming back within the therapeutic range and it was taking an average of 80 hours to obtain a new doctor's order and 103 hours to administer new medication to the resident. Following the introduction of mobile INR testing, these times were reduced to five hours and thirteen hours respectively. Three quarters of INR tests are now within therapeutic range. The pilot resulted in 2.7 hours of registered staff time released to care per week and a 36-percent reduction in INR testing costs annually. Leisureworld

estimates that, if point-of-care INR testing was introduced across all Ontario long-term care homes, the savings would amount to \$3.2 million annually. Learn more about Leisureworld Vaughan at: <http://www.onvaughan.com/leisureworldvaughanX>.

Algoma Manor–Workplace of the Year Honorable Mention–Algoma Manor is a 96-bed not-for-profit long-term care home located in Thessalon. As a result of accreditation and development of a new Quality Risk Management Department, the home was able to improve operations and staff training. In addition to improved person served outcomes and high satisfaction, the home reduced its Workplace Safety and Insurance Board (WSIB) New Experimental Experience Rating (NEER) costs by 50 percent. The rating is based on actual versus expected staff lost time, injuries, claims, etc., and determines premiums companies are charged. Learn more about Algoma Manor at: <http://algomamanornursinghome.com/>.

Congratulations to these organizations on their accomplishments.

Has your organization recently been recognized for an outstanding achievement? Please let us know by contacting scraddock@carf.org.

Below: Leisureworld Vaughan accepts its quality award at the OLTCA conference.



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2013 CARF–CCAC and Aging Services Educational Opportunities

July 11: 1–2 p.m. EDT

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](#)

September 19: 1–2:30 p.m. EDT

Aging Services and Continuing Care Accreditation Commission Webinar:
Financial Ratios and Trend Analysis

This webinar will be co-presented by FAP members Michael Kelly, managing director at Ziegler Capital Markets–Southeast; 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 & 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.

[Register Here](#)

September 23–24 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.

[Register Here](#)

November 5: 1–2:30 p.m. 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 ; 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 Association of Community Care Access Centres \(OACCAC\)**](#) presents its annual *Knowledge and Inspiration 2013 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 their 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 and Expo, October 27–30, in Dallas, TX.

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

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