

In this issue:

[CARF Updates Selected Aging Services Standards](#)

[CARF Reviews Dementia Care Standards](#)

[Introduction to Performance Measurement for Aging Services – Updated Publication](#)

[Consumer Guide to Understanding Financial Performance and Reporting in Continuing Care Retirement Communities – Updated Publication](#)

[Financial Advisory Panel \(FAP\) Member Highlight](#)

[Coaching Corner: FAQs on the QIPs](#)

[2013 CARF–CCAC and Aging Services Educational Opportunities](#)

[Upcoming Events](#)

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## CARF Updates Selected Aging Services Standards

In June 2013, CARF convened persons served, providers, and regulators to identify the top issues of quality that will be impacting independent senior living, assisted living, nursing homes, and continuing care retirement communities (CCRCs) over the next few years.

Insights were used to develop CARF's first set of standards for independent senior living providers. Updates were also suggested for standards related to assisted living, nursing homes, and CCRCs.

Because CARF uses an interdisciplinary approach when sets of standards are developed or revised, these proposed standards will be posted for a public comment period called a field review by the end of the summer. Service providers, consumers, caregivers, payers, and other interested parties are strongly encouraged to provide feedback to ensure the relevancy of the standards before they are adopted and published in the 2014 standards manuals.

For more information regarding CARF's work on aging services standards, please contact Sue Matthiesen, managing director of Aging Services, at [smatthiesen@carf.org](mailto:smatthiesen@carf.org).

CARF would like to acknowledge the following individuals who served on the June 2013 International Standards Advisory Committee (ISAC):

Kathy Badali, M.H.Sc., B.Sc.PT  
Scarborough, ON

Wayne T. Curtin  
WTC Public Affairs Advisors LLC  
Louisville, KY

Melody Gagner, RN, B.S.N.  
Madonna  
Eagle, NE

Allison D. Guthertz  
Benchmark Senior Living  
Wellesley, MA

Calvin J. Green  
Texas Department of Aging and Disability Services  
Austin, Texas

Bryan Hudson  
Atria Senior Living, Inc.  
Louisville, KY

Alfred C. Johnson  
Wisconsin Department of Health Services  
Madison, WI

Kayda Johnson  
Senior Resource Group  
Solana Beach, CA

Andy Kasnot  
La Siena  
Phoenix, AZ

Ron D. Mead  
Senior Resource Group  
Solana Beach, CA

Diana Morris  
La Siena  
Phoenix, AZ

Paula Neves  
Ontario Long Term Care Association  
Markham, ON

Kathryn Pilkington  
Ontario Association of Non-Profit Homes and Services for Seniors  
Woodbridge, ON

Karen L. Russell  
ACTS Retirement-Life Communities  
West Point, PA

Holly S. Schade  
ACTS Retirement-Life Communities  
West Point, PA

Grace Sweatman  
Christie Gardens Apartments and Care, Inc.  
Toronto, ON

[Back to top](#)

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## CARF Reviews Dementia Care Standards

Projections indicate that the number of people with dementia will continue to grow, particularly among the oldest of the elderly population, and countries in demographic transition will experience the greatest growth. The Alzheimer's Foundation of America identifies Alzheimer's disease as the most common cause of dementia, or loss of intellectual function, among people age 65 or older. The Alzheimer's Association estimates that more than five million Americans are living with Alzheimer's disease, and it is the fifth leading cause of death for persons age 65 and older.

A collaborative approach that includes initiatives in both public and private sectors is needed to improve the care and quality of life of people with dementia and their family caregivers. The priority areas of action include raising awareness, timely diagnosis, commitment to good quality continuing care and services, caregiver education and support, workforce training, and prevention and research.

Throughout 2013, CARF has been examining its standards for dementia care programs. Specifically, in January 2013, CARF collaborated with the National Task Group (NTG) on Intellectual Disabilities and Dementia Practices to ensure that dementia care standards address the needs of individuals with intellectual or developmental disabilities and dementia. The NTG cites research confirming that, although dementia as experienced by adults with intellectual disabilities/developmental disabilities (IDs/DDs) "is generally similar to that as experienced by other persons, there are exceptions. Some individuals with select conditions (Down syndrome, in particular) are more at risk for dementia, experience earlier age of onset, more rapid decline, and a briefer duration between diagnosis and death." In addition to providing input into the content of CARF's Dementia Care standards, the NTG also published *Guidelines for Structuring Community Care and Supports for People with Intellectual Disabilities Affected by Dementia*, which is downloadable at:

<http://aadmd.org/sites/default/files/NTG-communitycareguidelines-Final.pdf>

CARF will also enhance the 2014 edition of CARF's Employment and Community Services Standards Manual with the results of this work.

In June 2013, CARF convened an ISAC to further review the dementia care standards to identify effective practices in assisted living, long-term care homes, and CCRCs. This

committee identified that, because dementia is so prevalent in today's aging services settings, education and care practices related to dementia have become a customary part of how organizations function. CARF, therefore, should integrate dementia care practices into all appropriate care settings.

Later this summer, CARF will be seeking more extensive input on this work through its field review process. As they become available, CARF's public field reviews are posted at [www.carf.org/FieldReviews](http://www.carf.org/FieldReviews). All interested parties are encouraged to review standards and provide comments.

For more information regarding CARF's work on dementia care standards, please contact Sue Matthiesen, managing director of Aging Services, at [smatthiesen@carf.org](mailto:smatthiesen@carf.org).

[Back to top](#)

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## ***Introduction to Performance Measurement for Aging Services – Updated Publication***

The purpose of the *Introduction to Performance Measurement for Aging Services* is to provide an understanding of performance measurement and its importance to organizations, the process of creating a performance measurement system, and key factors to ensure system effectiveness. The guide includes case studies based on information provided by accredited aging services organizations in multiple settings.

The concepts presented in the guide are consistent with the CARF and CARF–CCAC standards on Performance Measurement and Management and Performance Improvement. Historically, accredited organizations have found these standards areas particularly challenging.

For organizations struggling with where to start performance improvement initiatives, or for confirmation that your organization is headed in the right direction, we have updated our *Introduction to Performance Measurement for Aging Services*.

Changes made to this valuable publication include:

- Updating case study examples.
- Making minor adjustments to ensure relevance for the current CARF Aging Services and CCAC standards.
- Updating the narrative relative to current regulatory changes that may occur over the next few years.
- Updating the CARF and CARF–CCAC standards related to performance measurement.
- Ensuring that text and examples are relevant to the breadth of CARF accreditation programs offered in Aging Services.

To purchase the *Introduction to Performance Measurement for Aging Services*, [click here](#) or go to [www.carf.org/catalog](http://www.carf.org/catalog). Click on "Aging Services," then "General AS Publications."

The cost of the PDF document on CD-ROM is \$52.00.

[Back to top](#)

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## ***Consumer Guide to Understanding Financial Performance and Reporting in Continuing Care Retirement Communities – Updated Publication***

The *Consumer Guide to Understanding Financial Performance and Reporting in Continuing Care Retirement Communities* has become the premier resource for consumers looking at moving into a CCRC as a long-term living option. This guide has been featured in the *Wall Street Journal* as well as numerous aging services resource venues.

The purpose of this guide is to educate consumers about what factors should be considered when looking at CCRCs. Primarily focused on education and considerations around CCRC financial health and disclosure, this guide provides a variety of questions to aid in determining the right fit for the consumer.

Changes made to this guide include:

- Updating financial terminology.
- Clarifying key financial concepts used to educate the consumer in the financial primer section.
- Enhancing the questions to ask when considering a move to a specific CCRC.

To download a complimentary copy of the *Consumer Guide to Understanding Financial Performance and Reporting in Continuing Care Retirement Communities*, [click here](#) or go to [www.carf.org/Resources/ConsumerResources](http://www.carf.org/Resources/ConsumerResources). Scroll down to the “Seniors and Aging” section. The PDF document is the first resource under the “Seniors and Aging” heading.

To purchase a package of 25 booklets, go to [www.carf.org/catalog](http://www.carf.org/catalog). Click on “Continuing Care Retirement Communities,” then “General CCRC Publications.” The cost of a package of 25 booklets is \$62.00.

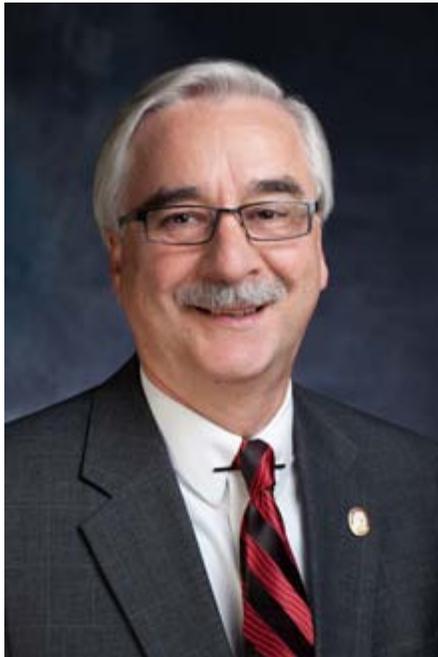
[Back to top](#)

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## **Financial Advisory Panel (FAP) Member Highlight: Geary K. Milliken**

Geary Milliken has been at the forefront of aging services for close to 40 years. As president/CEO of Carroll Lutheran Village, a CARF–CCAC accredited CCRC, for the past twenty years, his vast experience of working in social ministry for the Lutheran Church has provided Milliken with the tools and mission to make his organization one of the largest faith-based, nonprofit CCRCs in the Greater Baltimore area. Nationally, Milliken serves on the FAP for CARF–CCAC; is a member of LeadingAge™, a national not-for-profit senior living

association; and is the board chair of LeadingAge Maryland. Regionally, he is on the board of Kairos Health Systems, which represents nonprofits in the managed care arena. Milliken is a charter member of Lutheran Services in America and is a fellow in the University of North Texas Coalition for Leadership in Aging Services (CLAS).



The CARF–CCAC staff spent some time with Milliken to discuss his views on the top financial considerations, issues, or practices that support quality in aging services; his opinions about accreditation; and what he finds valuable about his participation on the FAP.

When asked about the top financial considerations, issues, or practices that support quality in aging services, Milliken states, “The demographic shift of the growing aging population will have a significant impact on financial resources throughout both the government and the private sector. Conversely, aging consumers have significant expectations and diverse demands on how they wish to be served. This will create opportunity for new and innovative services to meet those challenges.

While service providers try to accommodate a more demanding clientele in a cost-effective manner, the regulatory environment will also be challenged to keep up with both the financial realities as well as customer expectations. Some may say these are challenging times, others will see the vast opportunities!” Milliken is leveraging these opportunities with the evolution of Carroll Lutheran Village and the development of a new CCRC, Lutheran Village at MILLER’S GRANT in Ellicott City, Maryland, which is planned to be ready for occupancy in 2015.

What value does CARF–CCAC accreditation bring to Milliken’s organization? One word – *credibility!* Milliken notes through a rigorous review process, his organization benchmarks itself against the best of the best. It keeps the organization focused on excellence.

Since becoming president/CEO, Milliken’s Carroll Lutheran Village has experienced growth, including increased assets of the organization from \$22 million in 1994 to more than \$115 million today. Two major expansions on the Westminster campus have resulted in the addition of Diven House for assisted living, Krug Chapel Auditorium, as well as the wellness and hospitality centers and 142 new apartments and homes, bringing the resident community to 700. It is Milliken’s business acumen and passion for aging services that earned him a position on the CARF–CCAC FAP.

For Milliken, being on the FAP has been a wonderful experience—working with colleagues across the country, comparing perspectives and trends that broaden his understanding of what is happening in the field of aging. The opportunity to meet with a variety of operators as well as members of the financial community and have regular updates on both public policy and the investment marketplace is invaluable. When asked about important features of the FAP, Milliken states, “The format is a very open conversation that helps us reflect on how the field is changing around us and how CARF standards, benchmarks, and trends need to be periodically evaluated for relevancy in today’s business climate.”

For more information about Milliken and his organization, please visit:

Carroll Lutheran Village: [www.carrolllutheranvillage.org](http://www.carrolllutheranvillage.org)

Lutheran Village at MILLER'S GRANT: [www.millersgrant.org](http://www.millersgrant.org)

[Back to top](#)

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## Coaching Corner: FAQs on the QIPs

*Q: What is the CARF Quality Improvement Plan (QIP)?*

A: The QIP is a document provided to the organization at the same time the survey report is distributed. The QIP contains all of the standards that were indicated as areas for improvement on the accreditation report. The organization is required to complete the form by identifying briefly how it will come into conformance to the standard as well as a target or actual completion date for its action. No supporting attachments should be submitted with the QIP.

*Q: How do I find my organization's QIP?*

A: The QIP can be found on the CARF Customer Connect website. Log into the website (<https://customerconnect.carf.org/>) and click on the arrow next to your organization's survey number. You will find the QIP under the tab marked "Survey Documents." You will need to save this document to your computer in order to complete the form, as it cannot be filled in on the website itself.

*Q: I logged into Customer Connect but I don't see my QIP. Where is it?*

A: If you have received your accreditation report and accreditation outcome but you do not see your QIP on the "Survey Documents" tab, then it is likely that you need to download the most recent version of Java. The Java icon is located on the left-hand side of the screen on the Customer Connect website. Click on the link to download the most recent version and refresh your browser. If you are still unable to see your QIP, please contact your CARF resource specialist.

*Q: How long do I have to complete the QIP?*

A: You have 90 days following the notice of accreditation in which to complete the QIP.

*Q: How do I submit the QIP?*

A: Once it is completed, you can email a copy of the QIP to [edocs@carf.org](mailto:edocs@carf.org). It will be reviewed by the CARF staff and you will be contacted if there are any additional questions.

If you have any questions regarding the QIP, please consult your resource specialist.

## 2013 CARF–CCAC and Aging Services Educational Opportunities

**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 Amy Castleberry, senior vice president at Ziegler Investment Banking; 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 of CARF–CCAC Accredited Communities* 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: 9 AM–4 PM EDT**

### **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 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.

[Register Here](#)

[Back to top](#)

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## Upcoming Events

We look forward to seeing you at these upcoming events:

**[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 & Expo October 27–30 in Dallas, TX

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

[Back to top](#)

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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).

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