

Continuing Communication

Aging Services News

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In this issue:

[Congratulations to the 2014 Surveyor Training Class](#)

[2014 Adult Day Services Financial Indicators Study](#)

[Financial Advisory Panel \(FAP\) Member Highlight: Timothy L. Myers](#)

[Innovative Practice: RiverWoods at Exeter Helps Employees Obtain Associate Degrees](#)

[2014 CARF-CCAC and Aging Services Educational Opportunities](#)

Congratulations to the 2014 Surveyor Training Class

This past March, 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 two of CARF's veteran surveyors who served as mentors: Michael Flynn, vice president/CFO, Friendship Senior Options, Schaumburg, IL, and chair of CARF's Financial Advisory Panel (FAP), and Jeremy Neely, executive director of Normandy Farms Estates in Blue Bell, PA. The mentors provided the surveyor trainees with guidance, expertise, and feedback throughout the in-depth education process.

“Our training team had an outstanding mentor. He was always ready with a suggestion, a piece of advice based on his own experience, and a reassuring comment when needed.”

“I learned a great deal from our mentor. The CARF trainers were also excellent. I loved the support and the entire experience.”

—Quotes from CARF Surveyor Trainees

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 their professional development, their organizations, and the field, including:

- an opportunity to learn from other providers,
- professional networking with peers in the field,
- complimentary registration for most CARF-sponsored events,
- a chance to contribute to the quality of services in organizations, and
- domestic and international travel opportunities to see organizations throughout the world.

A surveyor's organization not only benefits by having a staff member who is up to date with CARF information, but it also offers a unique professional development opportunity for the organization's 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 2015 will tentatively be held in Tucson, AZ, in March. 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 2015 surveyor training is October 31, 2014.

Please contact Cathy Rebella toll free at (888) 281-6531, extension 7132, or via email at crebella@carf.org, for additional information.



Above: Blue Team surveyor trainees, left to right, are Todd Fraleigh, Kathy Romas Jaeger, Jeremy Neely (mentor), Joanne Thomson, Beth Grigg, and Geoffrey Gill.

Below: Red Team surveyor trainees, left to right, are Patricia Savage, Margot Kummer, Roxanne Adams, Michael Flynn (mentor), and Janet Groux.



[Back to top](#)

2014 Adult Day Services Financial Indicators Study

CARF International, the National Adult Day Services Association (NADSA), and Reinsel Kuntz Leshner LLP are collaborating to conduct the 2014 Adult Day Services (ADS) Financial Indicators Study to develop and present financial benchmarks to the ADS field. This is the fifth year of this study, and all providers are strongly encouraged to participate in order to enhance the validity of the financial benchmarks being developed for the ADS field and to get a feel for how your own ADS center is performing financially based on 2013 financial results.

Many leaders in the ADS field have identified the need for financial benchmarking. Other sectors such as Continuing Care Retirement Communities (CCRCs) rely on financial benchmarking information to enable them to assess trends and make sound financial decisions in varying economic times. Moreover, rating agencies, investment bankers, and accountants rely on financial ratios to assess organizational viability when assigning ratings and structuring debt. The ADS field can likewise benefit from financial benchmarks to aid not only with operational management, but also with advocacy initiatives as payment for ADS services is often at risk when state budgets are limited.

Participation in this study is of no cost to your organization, and participants will receive a complimentary summary of financial benchmarking information. Because this study combines the efforts of a respected national association and an international accreditor, the information submitted by each participant in the study will not be disclosed to other organizations or used for marketing purposes.

To participate in the ADS Financial Indicators Study, please send the following information to CARF at as@carf.org any time before Friday, June 27, 2014:

For your ADS program's fiscal year ending in 2013:

- Internal, unaudited 2013 fiscal year financial statements, including revenue and expenses and balance sheet for the ADS portion of your company.
- Corporate audit financial statements for the 2013 fiscal year (if applicable).

Note: If your financial information is consolidated for a larger organization, please clearly identify the ADS financials or send a separate report with only the ADS financial information included.

A representative from CARF's FAP is assisting in calculating the financial benchmarks based on the data submitted. The FAP member assisting with this study is Jeff Boland, partner, Reinsel Kuntz Leshner LLP. He also presented the results of the last four studies at the NADSA Annual Conferences in 2010-2013. In Boland's role as a FAP member, he is required to maintain confidentiality of any financial information disclosed for the purposes of this study. For more information on the FAP's role related to accreditation, go to www.carf.org and type *FAP* in the search field located in the upper left corner of our website.

The ADS Financial Indicators Study is an opportunity for each ADS provider to add significant value to their budgeting, planning, and advocacy efforts. Because there is no cost to participate in the study, and little time needed to simply submit financial statements to CARF, all providers are encouraged to participate.

Questions may be addressed to CARF's Aging Services customer service unit by calling toll free (888) 281-6531 or by sending an email to as@carf.org.

[Back to top](#)

Financial Advisory Panel (FAP) Member Highlight: Timothy L. Myers



Timothy Myers is responsible for all financial activities of The Kendal Corporation (Kendal®) and has financial oversight responsibility for all of Kendal's affiliated entities. The Kendal corporate office is located in Kennett Square, PA. Kendal and its related affiliates comprise approximately 3,000 residential and healthcare units at thirteen locations in eight states.

Myers is also involved in all financial aspects of Kendal's development activities, including financial feasibility, bond financing, debt restructuring, and startup activities.

Myers joined Kendal in 2007. From 1998 to 2007, he was a principal and CFO for New Life Management, Inc., in Mount Laurel, NJ. At New Life, Myers was responsible for financial

feasibility projections, tax-exempt bond financing, troubled facility financial reorganization and consulting, facility expansion consulting, and day-to-day financial management oversight of CCRCs. Myers worked for Marriott Senior Living Services in 1997, assisting in the sale of the Forum Communities, and was responsible for managing a CCRC in Northern California. From 1987 to 1997, Myers worked in the national long-term care practice of KPMG located in Harrisburg, PA, providing assurance and advisory services to long-term care clients.

Myers currently serves on the CARF FAP and is a member of the Pennsylvania and American Institutes of Certified Public Accountants.

Myers has a bachelor of arts in accounting from Lycoming College in Williamsport, PA, and is a certified public accountant in Pennsylvania. He is also close to completing his pursuit for a master's degree in ancient history from the University of Wales Trinity Saint David in Lampeter, Wales.

The CARF–CCAC staff asked Myers to discuss his views of 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, Myers stated, “Providing quality services is a multifaceted challenge that is constantly evaluated and reevaluated. From a financial standpoint providing quality service begins with a careful plan to safeguard and effectively utilize financial resources. Because providing quality services involves changing how care and services are delivered over time, it is important that there always are sufficient financial resources to support that change. Quality care is not delivered like it was twenty years ago, and quality care provided twenty years from now will likely be delivered in a very different manner. The ability to change, improve, and consistently deliver quality care presupposes a firm financial framework.” In addition, Myers noted that the three key financial indicators for most communities will be net operating margin, days cash on hand, and capital expenditures as a percentage of depreciation.

What value does CARF–CCAC accreditation and his involvement on the FAP bring to Myers’ organization? Myers stated, “One of the valuable benefits of being involved with the FAP, apart from the contact with other industry professionals, is the ability to gain a wider understanding of the general financial position and operations of CARF–CCAC-accredited organizations. It is extremely helpful to be able to have readily accessible financial benchmarking information to use for my own communities. That benchmarking is highly regarded as an educational and measurement tool for our board, management, and residents.” As a testament to the value of the financial benchmarking that CARF–CCAC accreditation provides, Myers spends much of his time at Kendal presenting to resident groups that are very interested in not only the financial results of their community but also in the financial status of the industry in general. Myers commented that most residents are very interested in the long-term viability of the industry, what products and services are new, what is anticipated in the future, etc.

What are Myers’ views regarding the FAP’s role today? Myers stated, “The FAP’s most important function is to assist in identifying accredited organizations that may be experiencing financial difficulties in order to appropriately assist CARF–CCAC management in administering the accreditation standards. Another very important function of the FAP is to assist with the preparation of the annual benchmarking data booklet known in the industry as

the *Financial Ratios & Trend Analysis of CARF–CCAC Accredited Organizations* publication.” Myers’ contributions to the CARF–CCAC FAP and the advancement of the aging services sector are greatly appreciated.

For more information about the CARF–CCAC FAP role, please visit:

www.carf.org/About/FAP.

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

The Kendal Corporation: www.kendal.org.

[Back to top](#)

Innovative Practice: RiverWoods at Exeter Helps Employees Obtain Associate Degrees

Every so often CARF surveyors come across an organization with a practice that produces outstanding business or clinical results and/or is innovative and creative.

The sharing of these practices benefits the field by providing ideas that other organizations can replicate.



Surveyors recently conducted an on-site survey for RiverWoods at Exeter, a CCRC located on the Seacoast of New Hampshire. This organization exceeded a CARF–CCAC standard as a result of the way in which it provides resources to personnel for professional development.

RiverWoods is an independent, nonprofit CCRC currently celebrating its twentieth anniversary. The organization began as a dream around the kitchen table of a handful of Seacoast area residents. Created by quintessential New Englanders, the small, persistent group worked for ten years on the planning and endured many hurdles before locating a funding stream that enabled them to build their first community, which opened in 1994 as a CCRC with three levels of care.

Today, RiverWoods comprises three distinct campuses, with close to 400 apartments and cottages, located on 200 wooded acres. Proud of its resident-centered culture, the community has planned its growth wisely and has maintained CARF–CCAC accreditation since its fifth year of operation.

RiverWoods employs close to 480 staff to serve its 620 residents. There are a wide variety of employees, some of whom have not had the opportunity to attend college, due to various circumstances. Because RiverWoods prides itself on promoting employees from within, it also assumes the responsibility of helping employees learn the basics of management. Therefore, it was excited when educational leaders at Southern New Hampshire University (SNHU) approached RiverWoods with an innovative request—they wanted to partner with RiverWoods to pilot a new program they were testing. SNHU has been recognized nationally as an educational innovator and a leader in online learning. SNHU selected RiverWoods along with other companies, such as Anthem Blue Cross Blue Shield, Delta Dental, and Goodwill Industries, to help it field-test its educational model.

The pilot, funded by the Gates Foundation and the U.S. Department of Education, sought nothing less than to provide a pragmatic, affordable, yet high quality program to deliver a post-secondary educational opportunity to adult learners currently in the workplace. The creative College for America format provides students with a work-based, self-directed path to achieve an associate degree. This program recognized the fact that adult learners are often juggling a job and family, and was designed to help them succeed and receive credit for work experience and learning they already have.

A total of 21 RiverWoods employees were chosen to be part of the pilot with SNHU and now have access to a laptop, a learning coach, and a mentor in their workplace. The College for America program provides RiverWoods with an opportunity to reward and recognize high potential employees and to demonstrate to them that the organization is invested in their success. It offers an innovative benefit that helps contribute to the development of its employees as well as RiverWoods as an organization.

The SNHU program is nationally available to CCRCs. For additional information, please contact Dawn Barker, vice president of human resources, RiverWoods at Exeter, at dbarker@riverwoodsrc.org or at (603) 658-3002.

[Back to top](#)



2014 CARF-CCAC and Aging Services Educational Opportunities

Transforming Outcomes

July 17-19, Taj Boston, Boston, MA

The Transforming Outcomes Data into Management Information Institute takes you through the steps required to plan and conduct a program of outcomes management and quality improvement. The three-day, hands-on institute includes:

- Outcomes system design and data collection.
- Data analysis, interpretation, and management reporting.
- Identification of areas for quality improvement activities based on findings.

The institute is recommended for individuals who design, manage, analyze, or interpret outcomes data in the health and human service fields, including aging services, behavioral health, child and youth services, employment and community services, medical rehabilitation, and opioid treatment programs. The institute is appropriate for administrators, data

managers, directors of quality improvement, program managers, information management specialists, executive directors, and direct service providers. It is also open to university faculty interested in creating course content for training students to use outcomes data.

Sample outcomes data and off-the-shelf software are used to teach skills needed to develop an outcomes program consistent with the CARF standards. The institute includes different computer lab groups to meet the learning needs of participants with a broad range of computer and data analysis expertise.

101s

September 9 & 10, Hilton Suites Phoenix, Phoenix, AZ
AS/CCAC 101: Preparing for a Successful Accreditation in Aging Services/CCAC

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.

Webinars

July 10: Aging Services and Continuing Care Accreditation Commission
Webinar:
Changes to CARF's Aging Services and CARF-CCAC Standards

September 17: Aging Services and Continuing Care Accreditation
Commission Webinar:
Financial Ratios & Trend Analysis

November 4: Aging Services and Continuing Care Accreditation
Commission Webinar:
Accreditation and U.S. Health Care Reform

For further information, please contact the CARF Education and Training Unit at (520) 325-1044 or toll free (888) 281-6531. Online registration is available at 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.

Please include the carf.org domain on your safe-senders list to ensure 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. 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.



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