

Continuing Communication

Aging Services News

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2015 CARF–CCAC and Aging Services Standards Available with Dementia Care Revisions



Based on significant interest from the field and increasing focus on memory care services in the senior living sector, CARF International has revised its standards for dementia specialty programs. The revised standards are available in the 2015 editions of both the CARF–CCAC and Aging Services standards manuals. An organization may choose to apply these specialty standards if it serves a specialized population for dementia care in a program such as Adult Day Services, Assisted Living, Person-Centered Long-

Term Care (Nursing Home) Community, Case Management, and Home and Community Services and wishes to seek accreditation for that program.

Organizations that fit the following program description for their dementia care services can apply these revised standards:

A dementia care specialty program delivers services that focus on the unique and changing physical, cognitive, communication, emotional, psychosocial, behavioral, occupational, medical, palliative, educational, environmental, and leisure/recreational needs of persons with dementia. Leadership fosters a relationship-centered culture in which persons served, families/support systems, and all personnel are empowered to make decisions in partnership based on the preferences, strengths, and needs of the person served.

The program integrates services to:

- *Preserve dignity and personhood.*
- *Minimize the impact of impairments and secondary complications.*
- *Maximize participation, including wellness, quality of life, and inclusion in the community.*
- *Decrease environmental barriers.*
- *Promote personal safety and security.*

A dementia care specialty program recognizes the individuality, preferences, strengths, and needs of the persons served and their families/support systems. It provides access to information, services, and resources to enhance the lives of the persons served and their families/support systems, facilitate engagement in meaningful activity, promote personal health and wellness, and preserve quality of life.

In the 2015 standards manuals, you will also find some moderate revisions to standards for Person-Centered Long-Term Care (Nursing Home) Communities, Case Management Programs, and Stroke Specialty Programs.

Remember to review the “Changes in the 2015 Manual” section located in the front of each standards manual for details regarding any updates in the manuals.

To learn more about how to obtain a 2015 standards manual and to determine whether these standards are a good fit for your organization, please contact CARF’s Aging Services customer service unit at as@carf.org or by calling (888) 281-6531, extension 5002.

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Adult Day Services Providers: Participate in 2015 Indicators Study

CARF, the National Adult Day Services Association (NADSA), and Reinsel Kuntz Leshner LLP are collaborating to conduct the 2015 Adult Day Services (ADS) Financial Indicators Study to develop and present financial benchmarks to the ADS field. This is the sixth year of this study. 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 their own ADS center is performing financially based on 2014 financial results.

Many leaders in the ADS field have identified the need for financial benchmarking. Other sectors, such as continuing care retirement communities, 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 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 Tuesday, June 30, 2015.

For your ADS program's fiscal year ending in 2014:

- Internal, unaudited 2014 fiscal year financial statements, including revenue and expenses and balance sheet for the ADS portion of your organization.
- Corporate audit financial statements for the 2014 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 [Financial Advisory Panel \(FAP\)](#)—Jeff Boland, partner, Reinsel Kuntz Leshner LLP—will assist in calculating the financial benchmarks based on the data submitted. Boland has presented the results of the past four studies at the NADSA annual conferences in 2010–2014. 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, visit: www.carf.org/About/FAP.

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.

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Coaching Corner: Customer Connect



Customer Connect is a CARF website designed specifically for CARF-accredited organizations and organization's seeking accreditation for the first time. Customer Connect allows you to access CARF information at any time and facilitates your ongoing relationship with CARF. It is the primary location for documents and communication about your organization's surveys.

With Customer Connect you can:

- Manage your own individual contact information.
- Access an email link to communicate directly with your CARF resource specialist.
- Complete and submit your organization's survey application online.
- View up-to-date information about your organization and your organization's surveys (including survey dates).
- View and download documents specific to your organization.
- Access information about the accreditation process. (Note: General "Survey and Accreditation Process" information can be accessed at <https://customerconnect.carf.org/WebHelp> without signing in.)
- Read the latest CARF news and announcements.
- Access CARF information and resources, including newsletters, free publications, education and training schedules, and the CARF e-catalog to order the latest standards manuals and publications.
- Access frequently requested resources, including things such as the:
 - CARF poster (to display when announcing a pending survey).
 - Media Kit (to help advertise your accreditation).
 - Ongoing communication form (to notify CARF of organization changes or significant events).

Who can access Customer Connect:

- CARF grants access to Customer Connect for individuals who are designated as key contacts for their organizations.
- If you are the designated key contact for your organization, once you are logged on, you may grant Customer Connect access to others in your organization by opening the Administration link in the left navigation bar. On the Administration page, you will be able to add or delete contacts and authorize contacts to work on the survey application. You will also be able to designate who will have the ability to submit the survey application when it is completed.

How to access Customer Connect:

- Go to <http://customerconnect.carf.org>.

- In the “Please log on” dialog box, enter your user ID. Your user ID is usually your first initial and last name.
- Enter your password and click Log On. If you have forgotten your password, click the Forgot your Password link to request a new one.
- To contact your resource specialist through Customer Connect, start at the home page and click on My Company. Then click on the Profile tab and select the link to Your Resource Specialist.
- Need help? Please visit the help center at <https://customerconnect.carf.org/WebHelp> or click on the Contact Us link from any page in Customer Connect.

Customer Connect tips for use:

- To ensure that the Customer Connect website is functioning up to its full potential, remember to clear your cache often to allow all CARF Customer Connect updates to be implemented. To clear your cache, please follow the instructions listed on the top of the site’s login page.
- Customer Connect requires that you use Internet Explorer versions 9–11. If you attempt to log into Customer Connect via other browsers, such as Google Chrome or Firefox®, the site may not work appropriately and the information entered may not be saved.

If you have difficulty entering information into your survey application, you will find a link for troubleshooting common difficulties on the login page.

CARF understands your busy schedule and Customer Connect is one of the many ways we seek to meet your needs.

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Culture Change: The Unique Journey of Christie Gardens

[Christie Gardens](#), a CARF-accredited continuing care retirement community in Toronto, Ontario, recently celebrated 30 years of providing care and services to residents. When CEO Heather Janes reflects upon this milestone, she thinks back in particular to the 25-year mark of Christie Gardens when the previous CEO, Grace Sweatman, felt like there was something missing from the way the organization was serving its residents.

At that time, Heather recalls that the culture of the organization was not as strongly aligned with its mission, which states: “We are committed to offering more and better choices to live well. Experienced in delivering distinctive services within a continuum of living, we are privileged to address the physical, emotional and spiritual needs of our residents. Most importantly, we are a community of individuals with shared experience and common interests. We are a faith-based organization with a focus on the arts and continued learning.”

Despite its mission statement, reputation for excellence, and commitment to quality services, Heather says that the leaders of the organization were not satisfied with what they viewed as the status quo in their field. “We operated as an institutionalized physical plant with long-term

care beds that were licensed by the government,” said Heather. “This meant that our 88 long-term beds had to be available to any taxpayer. Residents who might have lived at Christie Gardens for years had to relocate to other long-term care homes when different services were needed.” Heather, along with Grace and other leaders at Christie Gardens, believed that it was time for some major changes so that Christie Gardens could excel at fulfilling its mission.

Although it occupies a small geographic footprint in an urban Toronto neighborhood, Christie Gardens implemented big plans of transforming its staff culture around how to serve residents. It began to modernize the physical plant, and even took the unusual step of giving up its long-term care license in favor of providing private pay services so it could better fulfill its mission.

Over the past five years, the following major steps have taken Christie Gardens in a completely new strategic direction:

- The organization developed a manifesto, written from the eyes of a person served. “It is a very impactful and emotional document which serves as a bold direction to change,” said Heather. The manifesto has been instrumental in outlining a culture of service that defines the core identity, values, and purpose for Christie Gardens. It also articulates a vision of the type of community the organization can become over time.
- An extensive strategic study, including financial modeling, was conducted to determine if the long-term beds would be affordable to current and future residents if they were converted to private pay beds. Based on the results of this study, a capital campaign was implemented to establish a benevolent fund for residents who may not be able to pay for long-term care services over time, and to transform the physical plant into a person-centered environment.
- In 2009, the leadership of Christie Gardens decided to change the organization to be a privately funded, not-for-profit organization. It sold 88 long-term care licenses and has foregone government funding for long-term care services. Because there are very few full continuums of care in Toronto, Christie Gardens offers families a unique option in which loved ones can stay together in the same organization as their long-term care needs change. In the typical government-funded Ontario long-term care system, residents are not always able to exercise choice in long-term care providers.
- Christie Gardens is now in the process of transforming the physical plant from an institutionalized healthcare model into four distinct neighborhoods in one building. Each neighborhood is composed of twenty residences and a common family kitchen. The neighborhoods offer residents a comfortable social environment along with high quality services. Along with these changes, personnel are learning and demonstrating different approaches to how they interact with residents and with each other. “It has been a challenging yet rewarding journey,” said Heather.

After 30 years of providing care and services to residents, the past five years of which have been focused on a major culture transformation into a person-centered care model, Christie

Gardens is making significant progress on the changes it has launched. It is having success with the benevolent fund and the capital campaign, and personnel are learning a lot. Heather says she is also excited to see grassroots, resident-driven work being done to bring attention to the changes being made at Christie Gardens.

For more information on Christie Gardens, please visit:
<http://www.christiegardens.org/transformingthefuture.php>.

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CCRC Financial Ratios to Be Reviewed by the Field

CARF uses an interdisciplinary approach when tools to promote quality in the field are introduced or revised. The proposed or revised tools are posted for a public comment period called a field review. Service providers, consumers, caregivers, payers, and other interested parties are invited to provide feedback to ensure the relevancy of the tools before they are adopted and published.

This spring, CARF is seeking feedback on the current financial ratios that are applicable to CCRCs. These financial ratios have been in place since the beginning of the CARF–CCAC accreditation process. The financial ratios serve as nationally recognized benchmarks in the senior living sector.

The CCRC financial ratios field review will include complex financial concepts. All individuals with an in-depth understanding of how to calculate and analyze financial ratios for CCRCs are encouraged to participate by submitting opinions, comments, and suggestions. Feedback is essential to maintaining the relevancy and currency of CARF's financial ratios for CCRCs.

Three groups of financial ratios are tracked by CARF and will be open for comment:

- Margin (or Profitability) Ratios
- Liquidity Ratios
- Capital Structure Ratios

For each ratio, CARF will be seeking input regarding the accuracy of the ratio calculation, the ratio definition, and the value of the ratio to most CCRCs in the field today.

Any updates and clarification to the ratio information will be based on field review results.

The field review begins in March 2015. Interested parties can visit CARF's field review page at <http://www.carf.org/FieldReviews>.

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2015 CARF–CCAC and Aging Services Educational Opportunities

101s

These engaging two-day sessions provides a solid foundation for organizations seeking CARF accreditation. Participants will gain valuable insight into the accreditation process as well as helpful information on preparing for a survey and how to avoid the pitfalls some organizations may experience on their survey.

April 23–24, Hyatt House Charlotte/Center City, Charlotte, NC

[AS/CCAC 101: Preparing for Successful Accreditation in Aging Services and Continuing Care Accreditation Commission](#)

[Register Here](#)

September 9–10, DoubleTree by Hilton, Chicago, IL

[AS/CCAC 101: Preparing for Successful Accreditation in Aging Services and Continuing Care Accreditation Commission](#)

Registration coming soon

Webinars

March 31: **[Aging Services/Continuing Care Accreditation Commission Webinar: Changes to CARF’s Aging Services and CARF–CCAC Standards](#)**

This session will provide a high level overview of the changes to the revised 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, and accessibility.

[Register Here](#)

April 16: **[Aging Services/Continuing Care Accreditation Commission Webinar: Overview of CARF’s Dementia Specialty Standards](#)**

The prevalence of dementia is increasing in Aging Services programs. This

webinar provides an overview of CARF's dementia care specialty program standards that were recently revised based on significant input from the field.

[Register Here](#)

July 14: [Aging Services/Continuing Care Accreditation Commission Webinar: Changes to CARF's Aging Services and CARF-CCAC Standards](#)

This session will provide a high level overview of the changes to the revised 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, and accessibility.

[Register Here](#)

September 24: Aging Services/Continuing Care Accreditation Commission Webinar: Financial Ratios and Trends Analysis

Registration coming soon

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.

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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.

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