

Continuing Communication

Aging Services News

carf INTERNATIONAL

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2015 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 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, and all providers are strongly encouraged to participate to enhance the validity of the financial benchmarks being developed for the ADS field.

Participation will also help you get a feel for how your own ADS center is performing financially based on fiscal year 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, 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 because payment for ADS is often at risk when state budgets are limited.

The ADS Financial Indicators Study is an opportunity for ADS providers to add significant value to their budgeting, planning, fundraising, and advocacy efforts. Participation in this study is at 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, July 31, 2015**:

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

- Internal, unaudited 2014 fiscal year financial statements, including revenue, expenses, and balance sheet for the ADS portion of your organization.
- Corporate audited 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 financial information or send a separate report with only the ADS financial information included.

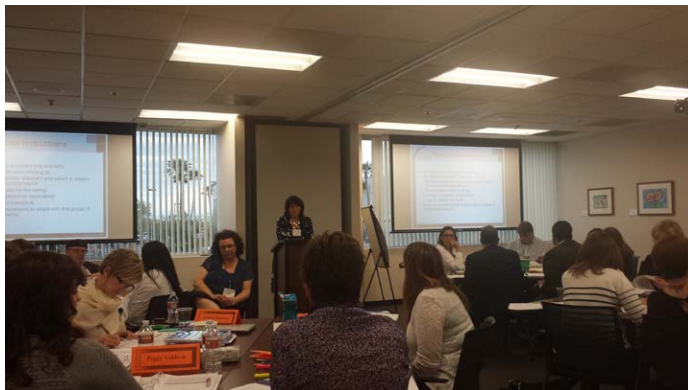
A representative from CARF's [Financial Advisory Panel \(FAP\)](#)—Jeff Boland, partner, Reinsel Kuntz Leshner LLP—will assist in calculating the financial benchmarks based on the data submitted. Mr. Boland has presented the results of the past four studies at the NADSA annual conferences in 2010–2014. In Mr. 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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Congratulations to the 2015 Surveyor Training Class

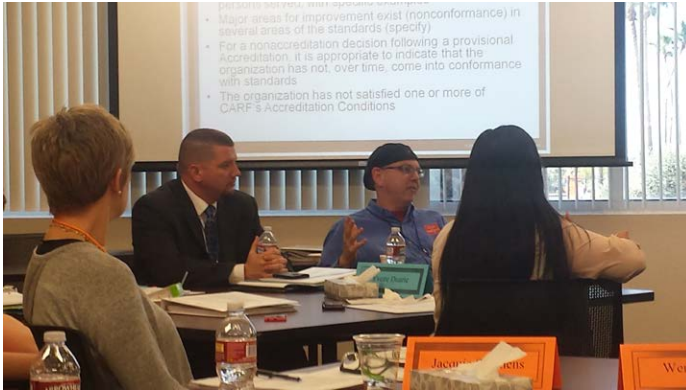
This past March, aging services professionals from CARF-accredited organizations across the United States and Canada gathered for a two-and-a-half day training in CARF's Tucson office to discuss the CARF survey process and techniques for effective surveying. The nineteen trainees were joined by four of CARF's veteran surveyors who served as mentors:



- **Nora Adelman**; director for policy, planning, and administration; The Kendal Corporation; Kennett Square, PA
- **Margaret Bailey**; director of support services; Leisureworld Senior Care Corporation; Simcoe, ON
- **Jed Johnson**; vice president, strategic initiatives; Easter Seals, Inc.; Washington, DC
- **Michael Rambarose**; President/CEO; Whitney Center, Inc.; Hamden, CT

The mentors provided the surveyor trainees with guidance, expertise, and feedback throughout the in-depth education process.

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.



In addition to contributing to the quality of services in their field, CARF surveyors gain substantial benefits for their own professional development and their organizations. These benefits include the opportunity to learn from other providers, exposure to national and international trends in the field, a chance for professional

networking, complimentary registration for most CARF-sponsored events, and both domestic and international travel opportunities. A surveyor's organization also benefits by having a staff member who is up to date with CARF information.

The next CARF Aging Services surveyor training will tentatively be held in Tucson, Arizona, in March 2016. 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 2016 surveyor training is October 31, 2015.

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

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Coaching Corner: When a CARF Standard Requires a Written Analysis

Analysis of information is a critical part of risk management and other performance improvement activities. Analysis is necessary for programs to carefully assess and identify opportunities for improvement, develop focused action plans, and improve performance. Although organizations often look at opportunities for improvement when a need arises, such as via a complaint or input from a stakeholder, there is value in routinely reviewing data collected over time to identify trends that might otherwise not be apparent. CARF standards often encourage this practice by asking for a written analysis.



When a CARF standard states the need for a written analysis, there is an expectation that the organization will review aggregated data over a defined time period, such as quarterly, semiannually,

or annually. Organizations should also have written evidence, such as a report, chart, or graph, to demonstrate their routine analysis. Written evidence may also include a narrative that outlines the analysis done, identifies trends and opportunities for improvement, and defines action plans to improve the program. The written analysis should include all elements as listed in the specific CARF standard.

Written analysis standards can be found in CARF's ASPIRE to Excellence® framework (Section 1 of the standards manuals). The standards below are examples that have been frequently identified as difficult for organizations. These standards are from the 2015 CARF–CCAC and Aging Services standards manuals:

1.H.10. (critical incidents) - A **written analysis** of all critical incidents is provided to or conducted by the leadership:

The written analysis of all critical incidents should address causes, trends, actions for improvement, results of performance improvement plans, necessary education and training of personnel, prevention of recurrence, and internal and external reporting requirements.

1.K.4. (formal complaints) - A **written analysis** of all formal complaints:

The written analysis of all formal complaints should determine trends, areas needing performance improvement, and actions to be taken.

1.N.1. (performance improvement) - A **written analysis** is completed:

The written analysis for performance improvement should be completed that provides an analysis for indicators that address business function and service delivery.

When developing an analysis of collected information, organizations should be asking questions such as:

- What does the information mean?
- What does the information relate to?
- What are the trends?
- What actions could be implemented to make improvements?
- What education might be needed to improve?

Many organizations collect large amounts of information to show progress and track programs, but do not address the analysis of that information. The practice of creating a written analysis is a good way to turn data gathered into understandable information to share, create action plans, and guide performance improvement activities.

Resources:

- CARF Aging Services resource specialists are always available to provide assistance when needed: www.carf.org/contact-us/.
- The U.S. Department of Health and Human Services Health Resources and Services Administration publishes an online document titled *Managing Data for Performance Improvement*: www.hrsa.gov/quality/toolbox/methodology/performanceimprovement/index.html

Education:

- Transforming Outcomes Data into Management Information Institute (www.carf.org/Events/TransformingOutcomes). This three-day CARF training

institute takes you through the steps required to plan and conduct a program of outcomes management and quality improvement, including outcomes system design and data collection; data analysis, interpretation, and management reporting; and identification of areas for quality improvement activities based on findings.

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CARF-Accredited Nursing Homes Demonstrate Better Quality

The findings of an independent research study on the impact of CARF accreditation on nursing homes was published in 2013 in the Rehabilitation Nursing Journal. The study, partially funded by the Agency for Healthcare Research and Quality (AHRQ), www.AHRQ.gov, was conducted by three university researchers—two from the U.S. and the other from Canada.

The study, conducted in 2010, compared 246 CARF-accredited nursing homes to 15,393 nursing homes without CARF accreditation to evaluate whether programs with CARF accreditation are associated with improved rehabilitation care. The study compared quality indicators between the accredited and non-accredited nursing homes, including rate of influenza and pneumococcal vaccination; percent of residents with pain, delirium, or pressure sores; and scores on a five-star quality measure and a five-star health inspection measure.

The key finding is that CARF-accredited nursing homes performed significantly better compared to U.S. national averages in six out of seven short-stay quality measures upon which the study was focused. This is the first published study to highlight the positive impacts of voluntary accreditation on quality measures among short-stay nursing home residents.

A summary is published on AHRQ's website at www.ahrq.gov/news/newsletters/research-activities/14feb/0214RA23.html.

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2015 CARF–CCAC and Aging Services Educational Opportunities

101s

These engaging two-day sessions provide 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.

June 23–24, Hilton Garden Inn Toronto Airport West, Mississauga, Ontario

[AS 101: Preparing for Successful Accreditation in Aging Services](#)

[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](#)

[Register Here](#)

Webinars

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: 2015 Financial Ratios and Trend Analysis of CARF-CCAC Accredited Organizations](#)

This webinar offers the first look at the findings in the 2015 Financial Ratios and Trends Analysis of CARF-CCAC-accredited organizations. Webinar participants will be able to:

- Review selected data found in the 2015 ratio trends publication with experts from the publication team.
- 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.

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.

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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