

Continuing Communication

Aging Services News

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A Pageant for All

By Lakisha Taylor, program director, Easter Seals West Georgia, Inc.

Easter Seals West Georgia, Inc., located in Columbus, Georgia, provides therapeutic day services and family support programs for children and adults with disabilities. Currently, Easter Seals serves more than 175 children and adults with more than 25 differing developmental disabilities. Many of the individuals we serve have autism, intellectual disabilities, cerebral palsy, Down syndrome, and many other disabilities.

Easter Seals strives to improve the quality of life of our participants by promoting and encouraging meaningful, life-affirming experiences. During last year's Literacy Awareness Celebration, we were visited by Miss Columbus. With her crown majestically placed atop her head, she visited all our participants, took pictures, and spoke to them about reaching their goals and never giving up. Many of our participants were inspired, and one in particular said, "I want to be a princess like her." Thus the seed was planted.

Shortly thereafter, we received an article regarding a pageant that was held in another part of the state. Each director received this email, and, unbeknownst to each other, sent their individual exclamations to the CEO that we need to have a pageant for our participants! Almost simultaneously, one of our volunteers indicated her desire to plan a special event for our participants, but wasn't sure yet what she wanted to do. The volunteer happened to be the current Miss Middle West Georgia's Outstanding Teen and was set to compete in June for the title of Miss Georgia's Outstanding Teen. We put on our thinking caps, and the first Annual Easter Seals Pageant was underway!

In every event, we strive to ensure that the encouragement and cultivation of social

connections between our participants and other individuals in the community are evident. Advocacy work and helping to promote a more inclusive and accepting community are at the very core of our work. What better way to facilitate this work than to ensure that the pageant is open for all to enjoy?

With the collaboration of local organizations, the first Annual Easter Seals Pageant was open to everyone of any age, ability, or gender. With the help of Miss Columbus and our volunteer, the judges were selected from the pageant industry. Pageant advertisements were distributed all over Columbus. The age divisions spanned from infants to the senior division, with an optional talent competition for each group. Each contestant was given a participation award, and there was also a title holder for each age division.

The day of the event, contestant after contestant took the stage, and it didn't take long for the audience to realize that this would be a special day. The pageant stage became a place of equality for our individuals; a level playing field; and a place where disability, age, or gender would not be a barrier. The smiles on the contestants' faces were priceless! Dreams were certainly being realized, both young and old. This was especially true for one contestant, who truly exemplifies the notion that you are never too old to shine! Patricia Woodward, who has been participating in Easter Seals' day program since 2007, is 63 years old.

Patricia (pictured on the right) is known for her passion for shopping, wearing beautiful clothing and jewelry, and giving out the best hugs. Upon hearing of the Annual Easter Seals Pageant, Patricia's sister stated, "Patricia is definitely a girly-girl, so a pageant is right up her alley! This has her name written all over it!"



Patricia competed in the Senior Easter Seals division for men and women aged 50 and older. Patricia was beautiful, standing proud in a stunning black dress with silver details that sparkled as she walked across the stage. She was truly in her element on stage as she beamed with joy and waved at her fans in the audience.



Then, the moment of truth had arrived. All of the contestants waited anxiously for the title holders to be named. Finally, the last age division, the senior division, was ready to be announced. Patricia looked anxious but excited as the judges called the second place, then the first place, and then the title holder. Patricia had won the crown for queen of the Annual Easter Seals Pageant! As the princesses helped put her sash and crown on, Patricia gave out those famous hugs! In her 63 years of life, this was Patricia's first award ever! It was her time to shine! Patricia's face lit up and continued to shine for days! (Pictured on the left: Patricia Woodward giving her famous hugs at the first Annual Easter Seals Pageant)

At the first Annual Easter Seals Pageant, there were certainly many new friendships formed. However, it was our community that gained the most, with a deeper appreciation and

understanding of how we all share the same dreams, goals, and aspirations. This was truly the hidden treasure.

As a champion for abilities, Easter Seals seeks to assist all people to realize their goals. We view our role as a conduit to developing lasting relationships, having meaningful experiences, and realizing independence. Like Patricia, there are many firsts for each of us. We are grateful to have had a part in creating a first for Patricia. As we plan the second Annual Easter Seals Pageant, we look forward to working with other individuals and organizations in our community to bridge the gap of understanding and create even more meaningful experiences and more firsts for us all.

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FAP Member Highlight: Amy Castleberry

In 2014, Amy Castleberry became a business firm member of CARF's [Financial Advisory Panel](#) (FAP), representing Ziegler. Castleberry joined the senior living team at Ziegler in 2006. In her role with Zeigler, she is responsible for providing investment banking services to not-for-profit senior living providers in Maryland. She also oversees credit structuring and consistency for the national practice, special situation credit monitoring, and market-related projects for the senior living finance team. Castleberry is also a frequent speaker at national and state senior living conferences, and she is often quoted in industry publications.



For several years prior to joining the FAP, Castleberry annually served as a lead contributor to *Financial Ratios and Trend Analysis of CARF–CCAC Accredited Organizations* by analyzing financial benchmarking data and drafting the key findings included.

As a member of the FAP, Castleberry enjoys the interaction and varying opinions between the professionals along with the diverse disciplines represented. She highly values the interaction of the group, with each member contributing what each perceives to be best practices in the senior living sector.

Prior to joining Ziegler, Castleberry worked as an analyst in the Municipal Credit Research & Strategies Group for Legg Mason Wood Walker, Inc., where she specialized in credit and relative value analysis for the senior living, healthcare, and high-yield sectors.

Castleberry earned a B.A. in journalism from the University of Maryland, College Park, and an M.B.A. from the Robert H. Smith School of Business at the University of Maryland, College Park. Castleberry served by appointment on the Maryland Commission on Aging from 2002 through 2004. She was awarded the Chartered Financial Analyst designation in 2004 and is a registered general securities representative and registered municipal principal.

For more information about Ziegler or Castleberry's background, please visit <https://www.ziegler.com/investment-banking/senior-living/amy-castleberry-cfa/>.

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CARF Surveyor Continuing Education 2015 and 2016



Each year, CARF accreditation surveyors are required to complete a specified number of continuing education hours to maintain surveyor status. This type of ongoing professional development provides organizations and programs pursuing CARF accreditation with a positive, accurate, and high-quality survey experience. Not only can surveyors obtain continuing education at their industry professional conferences, but CARF

also offers continuing education at the CARF Annual Surveyors' Conference, which focuses on key topics related to standards and surveyor business processes.

More than 300 surveyors from around the world participated in the 2015 CARF Annual Surveyors' Conference April 18–19 in Tucson, Arizona. This event offered education and networking opportunities among surveyors involved in aging services, medical rehabilitation, and employment and community services. Sessions addressed topics such as ethical considerations in the accreditation survey process, updates on CARF standards, a summary of CARF's research findings, technical assistance on using various CARF surveyor tools, and promising practices in business and service delivery that surveyors can identify during the survey.



In March of next year, the 2016 CARF Annual Surveyors' Conference in Phoenix, Arizona, will recognize CARF's 50th anniversary, and it will convene hundreds of surveyors from around the world to engage in networking and professional education.

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Coaching Corner: Strategic Planning



The CARF ASPIRE to Excellence® standards in Section 1 of all standards manuals include major topic areas that help organizations build an effective and efficient business foundation. An essential part of this foundation is an inclusive strategic planning process that results in a clear strategic plan to guide how an organization accomplishes major objectives. To this end, CARF's ASPIRE model of business practice

standards includes the section of standards titled "Set Strategy," which outlines topics such as the planning process, key components of the written strategic plan, and plan implementation. The standards recognize that the first step in effectively setting strategy is

the strategic planning process so that important information is considered and ultimately used to develop a clear, valuable strategic plan.

CARF's Strategic Planning standards address key areas, such as considering stakeholder expectations; analyzing competitive, regulatory, and legislative environments; and creating and implementing a written strategic plan that sets goals. The standards state, "CARF-accredited organizations establish a foundation for success through strategic planning focused on taking advantage of strengths and opportunities and addressing weaknesses and threats."

To help give insight into strategic planning, please enjoy the following article by Karen Stallons-Harris, M.S., B.S., OTR/L, a CARF surveyor for Aging Services and founder and CEO of Integrated Living, Inc. & Integrated Home Help Services, Inc. The article addresses some important aspects of strategic planning; its process; and how an organization can use it to achieve its identified mission, vision, and ongoing initiatives for performance improvement.

Strategic Planning: What It Is and Is Not

By Karen Stallons-Harris, M.S., B.S., OTR/L

Founder and CEO of Integrated Living, Inc. & Integrated Home Health Services, Inc.

Strategic planning for any size organization, not-for-profit or for-profit, can be an intimidating and overwhelming undertaking. Yet the process is vitally important to allow an organization to see where it is currently; where it wants to go; the obstacles to overcome; and the human resources, technology, and budgetary requirements necessary to get there. This planning process should be visionary in nature, including short- and long-term goals with identified time frames. Although the visionary process should project the desired future of the organization, it also must be practical and realistic. The strategic plan resulting from this process should serve as a roadmap for where the organization wants to be within a certain time frame, outline the steps to get there, and identify key participants and other stakeholders who will take ownership of various responsibilities. Although visionary in nature, flexibility is also a critical component of the planning process and final document.



Please note that the written strategic plan should not only be a list of goals, budget requirements, and identified barriers. Although these items should be part of the overall document, simply listing them in a document does not constitute a strategic plan. A true strategic plan will also include the specific plans to achieve the identified goals.

To initiate the process of drafting a strategic plan, many organizations follow this format:

- ***Determine the mission, vision, and values of the organization.***
- ***Complete a SWOT Analysis:***
 - ***Strengths***
 - ***Weaknesses***
 - ***Opportunities***
 - ***Threats***
- ***Identify short- and long-term goals with time frames for***

accomplishment. These goals should be related to the mission and vision of the organization.

- *Identify the personnel and/or departments that will take ownership of each of the goals. Make sure an action plan for goal achievement and budgetary considerations are included with each line item.*
- *Identify a format in the document for updating progress toward, and assessment of, goal achievement. Many organizations use a document formatted with columns or rows to easily identify and track goals, time frame, responsible staff, budget, and equipment and progress.*
- *Modify the plan as necessary, depending upon circumstances that may impede or eliminate the possibility of goal achievement within the identified time frames.*

The benefits of strategic planning are many:

- Identification of strengths and weaknesses
- Identification of capabilities and opportunities for the organization
- Creation of a roadmap for increasing efficiency and effectiveness related to goal achievement
- Identification of stakeholders at all levels
- Ownership of growth and continuous quality improvement within all levels of the organization
- Facilitation of decision making based on identified and focused goals with the time frames for achievement

Strategic planning can be a difficult and overwhelming process. However, when the key personnel to participate in the project are identified; the mission, vision, and values are established; and a SWOT analysis is completed, the organization can begin to focus on where it is and where it wants to be within established time frames. It may seem like a huge task to complete a working document called a strategic plan, and it is. But organizations need to begin the process and keep reminding themselves that the way to eat a cake is “one bite at a time.” The way to complete a strategic plan is to go step by step with committed personnel and enthusiasm for planning and envisioning goals.

References:

Barksdale, Susan and Teri Lund. *10 Steps to Successful Strategic Planning*. American Society for Training and Development (ASTD), Alexandria, VA, 2006.

Bryson, John M. and Farnum K. Alston. *Creating Your Strategic Plan – Third Edition. A Workbook for Public and Nonprofit Organizations*. Josey-Bass, San Francisco, CA, 2011.

Harvard Business Review Press. *Harvard Business Reviews 10 Must Reads On Strategy*. Harvard Business School Publishing Corporation, Boston, MA, 2011.

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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 and helpful information on preparing for a survey and how to avoid the pitfalls some organizations may experience on their survey.

September 9–10, DoubleTree by Hilton Hotel, Chicago - Schaumburg, IL

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

[Register here](#)

November 17–18, CARF Canada office building, Edmonton, AB

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

[Register here](#)

Webinars

September 24

[Aging Services/Continuing Care Accreditation Commission Webinar: 2015 Financial Ratios and Trend Analysis of CARF–CCAC Accredited Organizations](#)

[Register here](#)

This webinar offers the first look at the findings in the 2015 Financial Ratios & 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.

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 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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