

Continuing Communication

Aging Services News

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Residents' Rights Month – October 2016 – “My Vote Matters”

In the United States, the National Consumer Voice for Quality Long-Term Care (Consumer Voice) designates Residents' Rights Month in October to celebrate and honor residents living in all long-term care communities, including nursing homes, subacute units, assisted living, board and care, and retirement communities. The theme for Residents' Rights Month 2016 is [My Vote Matters](#), which aims to encourage residents to exercise their right to vote and participate in the political process.



Consumer Voice has developed resource materials to help communities plan events and communicate with residents. The materials include promotional items (logo, flyers, and sample letters) to help communities plan events and voting resources to help communities encourage residents to vote or get more involved. The voting resources include several tip sheets and promising practices that help remove barriers for residents wanting to have their voices heard.

Residents' Rights Month is a good time to offer your residents an opportunity to participate in engaging activities. Find out more at: <http://theconsumervoice.org/events/residents-rights-month-2016>.

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The Village at St. Clair Implements “My Story,” a Cultural Change to Care Planning



In a recent CARF accreditation survey for Schlegel Villages, The Village at St. Clair in Ontario was recognized for its extraordinary person-centred, individualized care plans. The Village at St. Clair was commended by the surveyors for taking a holistic approach with each and every resident and using the information gathered to incorporate their individual preferences and choices in the care plan.

When The Village at St. Clair first opened, it made a conscious effort to get away from the typical long-term care institutional model and instead looked to implement a more person-focused culture and social model of care. This culture is incorporated in all aspects of the organization's programming beginning with how it refers to the physical space and persons admitted. Where the long-term care field often refers to its physical space as “units” and the persons served as

“residents,” The Village at St. Clair refers to its space as “neighbourhoods” and persons served as “neighbours.” When a neighbour comes to live at The Village at St. Clair, an extensive interview is completed that gathers information regarding the neighbour's life and social history. The interview gathers information such as where the person grew up; if the person is married or has a partner/significant other and details about the relationship such as where and when they met and if they have any children or grandchildren; the person's work history, favorite memories, daily routines, favorite activities and leisure pursuits, favorite meals, religious/spiritual practices, and wisdom the person would like to share. When a neighbour is unable to provide this information, the organization will also seek the input from the person's family and friends as appropriate.

After all this information has been obtained, it is translated into an “I” focused care plan that is called “My Story.” In this type of care plan, the neighbours' preferences and choices are used to create “I” statements to guide their daily care and activities. Although “My Story” is still divided into traditional categories, the information is entered in a narrative format. Examples of this include:

- “I, Gladly, am a neighbour in the Oldcastle neighbourhood. I like to start my day around 11 a.m. as I like to sleep in. Please do not approach me prior to 11 a.m. as this is a trigger for me and I can become expressive verbally towards you. Please respect my wishes to sleep in as I use to work afternoons as a nurse.”

- “I have pain daily. When I am having breakthrough pain, you will notice that I will start to grind my teeth. That is an indicator that my pain is present. I suffer from chronic cluster headaches and have since my early 30s. Please offer me alternative treatments such as a cold pack to my forehead; quiet, darkened room; or light music.”
- “I prefer to have a cup of tea before I go to bed in the evening.”
- “Please help me to have a more joyful spa experience by providing me with a towel to help me maintain my privacy while showering.”
- “I prefer to have a shower on Wednesday afternoon and a bath Saturday afternoon. I have my hair done at the salon on Saturdays so I can be ready for Sunday church. Please don’t wash my hair on Saturdays. Remember, I like my privacy and for this reason prefer to have a towel draped over me while two team members are helping me bathe. Please play soft, calming music to help me relax and to make this experience more enjoyable for me. During this time, please make sure you take the opportunity to inspect my skin from head to toe for any concerns. Report any concerns (bruises, skin tears, redness, etc.) to the team lead in the neighbourhood so a skin concern form can be completed.”

The commitment to the person-centred culture and “My Story” is supported by a comprehensive training program. The Village at St. Clair has developed and implemented a 30-module training program on neighbourhood team development. Over the course of a year, each team member goes through a total of 12 hours of training that is organized into three four-hour segments. There is also an extensive training manual that was developed with input from neighbours, family members, and staff.

For more information about the use of “My Story” person-centred planning, please contact Danielle Loreto at Danielle.Loreto@schlegelvillages.com, Haley Cadarian at Haley.Cadarian@schlegelvillages.com, or Julie DAlessandro at Julie.DAlessandro@schlegelvillages.com.

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2016 Results: Financial Ratios and Trend Analysis of CARF-accredited CCRCs

Each year, CARF reviews the audited financial statements and the financial ratio calculations of accredited Continuing Care Retirement Communities (CCRCs) throughout the U.S. to identify key financial patterns and trends impacting the senior living field. The findings are published by CARF each October in the *Financial Ratios & Trend Analysis of CARF-accredited Continuing Care Retirement Communities*.



On November 15, 2016, CARF will present a webinar to share the ratio findings with the U.S. senior living field. Although the annual financial ratios session was historically presented each year at the LeadingAge Annual Meeting, this session will not be presented at the 2016

meeting. Interested individuals are therefore invited to register for this webinar to obtain the annual update on our findings. For further information, please contact the CARF Education and Training unit toll free at (888) 281-6531. Online registration is available at <http://www.cvent.com/d/3fq574>. It is also listed at: www.carf.org/events.

Accredited and nonaccredited CCRCs can assess their financial health in a variety of ways. Comparing an organization's results to similar organizations, or looking at trends over multiple periods, helps to inform strategic planning and pinpoint areas for improvement. During this webinar, experts from Ziegler and Baker Tilly will discuss benchmarking data of the 17 financial ratios calculated for both single-site and multi-site U.S. CCRCs. Specific comparative information will be provided based upon primary CCRC contract type and quartile rankings.

This webinar will highlight the standardized financial ratios information that is important to CCRC boards and management teams, and the broader financial professional and consumer constituencies. Webinar participants will have the unique opportunity to discover the financial ratio trends resulting from a number of factors such as provider growth, operating opportunities and challenges, regulatory and policy changes, and accounting changes. Best practices will illustrate how to successfully use an organization's financial ratio information to communicate with stakeholders.

Webinar content will offer participants and their teams the opportunity to:

- Review the current financial trends from the most recent fiscal year-end data of CCRCs across the U.S. and explore their significance to organization leaders.
- Compare current ratio findings to previous periods in order to offer context to these findings.
- Explore techniques for using financial ratios as a tool for identifying trends, communicating financial performance to various audiences, and conducting strategic planning.

Webinar presenters include the following distinguished members of CARF's Financial Advisory Panel who are also project partners for this annual publication:

Amy Castleberry
Senior Vice President
Ziegler

Amy Castleberry joined the senior living team at Ziegler in 2006. She is responsible for providing investment banking services to not-for-profit senior living providers in the Mid-Atlantic region. She also oversees credit and deal structuring for the national senior living practice, and has experience structuring over \$4 billion of transactions for new campus, major repositioning, and expansion financings for CCRCs. Amy serves on the CARF Financial Advisory Panel and as the lead contributor to the *Financial Ratios & Trend Analysis of CARF Accredited Continuing Care Retirement Organizations*. She is a frequent speaker at senior living conferences and is often quoted in industry publications. Prior to joining Ziegler, Amy 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. Amy 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. Amy 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.

Mark Ross

Partner and Healthcare Practice Leader

Baker Tilly

Mark Ross leads audits and consulting projects for the firm's healthcare and senior living clients. He has 25 years of experience in public accounting and has concentrated his efforts in the firm's healthcare practice during the past 19 years. His experience includes:

- Partner-in-charge of the audits of the financial statements for CCRCs, skilled nursing and assisted living facilities, rehabilitation hospitals, and affordable housing project.
- Partner-in-charge of the cost report preparation process for numerous clients.
- Partner-in-charge of various consulting projects, including, but not limited to, financial feasibility studies, operational reviews, and home and community-based services projects for numerous clients.
- For numerous clients, presentation of financial and other relevant industry information to client boards of directors and audit committees.
- Provision of a variety of accounting, internal control, and industry-related assistance and advice to the firm's healthcare clients.
- Licensed CPA in Pennsylvania and New York.

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Coaching Corner: Rights of Persons Served Standards in Section 1.K.



Section 1.K. contains standards to help organizations protect and promote the rights of all persons served. A few standards from this section were frequently cited during standards manual year 2014 (July 1, 2014 to June 30, 2015).

Frequently cited standards represent those areas that seem to be the most difficult for providers to achieve conformance.

One of the most frequently cited standards in section 1.K. is standard 1.K.1.a.(3), which requires that the rights of persons served be communicated to the persons served at least annually if they are in the program longer than one year. Often, an organization will provide the persons served their Resident Rights upon admission or in the handbook they received at admission, but do not provide these rights more than one time. When a person served is receiving program delivery for one year or more, he/she should have his/her rights communicated in a way that is understandable each year. The key to standard 1.K.1.a.(3) is to communicate to the persons served *at least annually*. Organizations can determine when and how the rights are communicated.

Tips for conformance from consultation given by surveyors for standard 1.K.1.a.(3)

The organization may want to consider:

- Incorporating communication of the rights of the persons served at a resident council meeting, annual care plan meetings, or when the resident handbook is annually updated.
- Giving a paper copy of the rights of the persons served to all residents in their mailboxes at least annually.
- Hanging posters that explain the rights of the persons served in several different locations. The posters could be placed at an accessible height for persons using a wheelchair, and use a large enough font size for persons with visual or cognitive issues.
- Creating newsletters or at least annual mailings containing resident rights.
- Scheduling a resident rights meeting every year to present the information.
- Using games such as Rights Bingo to provide resident rights information in a fun manner.
- Reviewing existing written signage regarding the rights of the person served to ensure visibility.
- Setting aside a separate time to introduce and discuss resident rights with persons served in regular intervals.

Other standards that are frequently cited within section 1.K. are 1.K.4.a. through 1.K.4.b.(3). These standards require that a written analysis of all formal complaints be conducted at least annually and determine trends, areas needing performance improvement, and actions to be taken. An analysis of formal complaints, grievances, and appeals can give the organization valuable information to facilitate change that results in better customer service and results for the persons served.

Because complaints may be part of risk management in some organizations, this information may be documented in a variety of reports and used for different purposes. For more information about CARF standards requiring a written analysis, please reference the Coaching Corner article [*When a CARF Standard Requires a Written Analysis.*](#)

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Congratulations to Aging Services Providers that Earned CARF Accreditation



Throughout the year, aging services providers are surveyed or resurveyed in order to earn or maintain CARF accreditation. Leading up to the survey, these providers apply CARF standards to their business and service practices, and then conduct a self-assessment. During the inclusive on-site survey, CARF surveyors assess their conformance to the standards.

Congratulations to the following providers that achieved CARF accreditation during the first quarter of 2016.

Belvedere Heights, Ontario

Chartwell Aylmer Long Term Care Residence, Ontario
Chartwell London, Ontario
Chartwell Parkhill - Chateau Gardens, Ontario
Cokesbury Village, Delaware
Country House, Delaware
Easter Seals Central and Southeast Ohio, Inc., Ohio
Hawthorn Court, Arizona
Heritage Nursing Home, Ontario
Mary Immaculate Nursing/Restorative Center, Massachusetts
Nightingale Nursing Registry, Ltd., Ontario
Nisbet Lodge, Ontario
North York Seniors Centre, Ontario
Pine Meadow Nursing Home, Ontario
Saratoga Retirement Community, California
Sherwood Care, Alberta
Springmoor Life Care Retirement Community, North Carolina
SpringRidge at Charbonneau, Oregon
Trinity Village Care Centre, Ontario
Villa Colombo Vaughan, Ontario
Watford Quality Care Centre, Ontario
West Toronto Support Services, Ontario

When preparing for the survey process, aging services providers regularly share with CARF their feedback about how it improved their organization and brought value to their stakeholders. Two of the recent accredited providers shared the following:

Personnel from the Nightingale Nursing Registry, Ltd. stated, "CARF standards encouraged evidence-based measurements, and the process systematically helped us meet regularly to focus on improvement in specific areas."

Leadership from North York Seniors Centre shared that the CARF process "assists in the maintainance of a continuous quality improvement framework for our organization. It's a positive learning, consultative, and reflective experience."

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Congratulations to Re kai Centres

In May, CARF-accredited organization Re kai Centres was awarded a 2016 Quality of Care award from the Ontario Association of Non-Profit Homes and Services for Seniors (OANHSS). Staff members were featured in the May issue of OANHSS' *Action Update*. View the publication at:

http://oanhss.informz.ca/OANHSS/data/images/Action%20Update%20&%20Housing%20News/Action_Update_May_2016.pdf

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Upcoming Events

September

Falls Prevention Awareness Day (September 22, 2016) (USA) – designated by the National Council on Aging - <https://www.ncoa.org/healthy-aging/falls-prevention/falls-prevention-awareness-day>

Theme: *Ready, Steady, Balance: Prevent Falls in 2016*



World Alzheimer's Month – designated by Alzheimer's Disease International - <http://www.alz.co.uk/world-alzheimers-month>

Theme: *Remember Me*

October

National Seniors Day (October 1, 2016) – designated by the Canadian Government - <http://www.seniors.gc.ca/eng/pie/nsd/index.shtml>

Theme: *Celebrating the continuing contribution of Canada's seniors*

World Arthritis Day (October 12, 2016) – <http://www.worldarthritisday.org> - coordinated by the European League Against Rheumatism

Theme: *It's in Your Hands, Take Action*

Residents' Rights Month (USA) – designated by the National Consumer Voice for Quality Long-Term Care - <http://theconsumervoice.org/events/residents-rights-month-2016>

Theme: *My Vote Matters*

World Stroke Day (October 29, 2016) – coordinated by the American Heart Association/American Stroke Association -

http://www.strokeassociation.org/STROKEORG/General/World-Stroke-Day-2012_UCM_444999_SubHomePage.jsp

Theme: *Sing to end stroke*

November

National Alzheimer's Awareness Month (USA) – designated by the Alzheimer's Association - <http://alz.org/index.asp>

Theme: *Go Purple with a Purpose*

National Family Caregiver Month (USA) – coordinated by the Caregiver Action Network - <http://caregiveraction.org/national-family-caregivers-month>

Theme: *Take Care to Give Care*

Fall Prevention Month (Canada) – coordinated by The Partners for Fall Prevention - <http://oninjuryresources.ca/fall-toolkit>

Theme: *We All Have A Role To Play*

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2016 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.

September 21–22, Philadelphia, PA

AS 101: Preparing for Successful Accreditation in Aging Services, including Continuing Care Retirement Communities

[Register here](#)

Webinars

November 3

An Introduction to CARF Aging Services Accreditation

This webinar will familiarize participants with CARF, the benefits of CARF accreditation, and the survey process for organizations of all sizes. This introductory presentation is designed for Aging Services providers that are not currently CARF accredited or would like to become familiar with the CARF accreditation process.

Register by emailing canadainfo@carf.org or calling (888) 281-6531, extension 3009.

November 15

2016 Results: Financial Ratios and Trend Analysis of CARF-accredited CCRCs

[Register here](#)

For further information, please contact the CARF Education and Training Unit at (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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