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## LeadingAge™ update

At the 2011 Annual Meeting of LeadingAge and the International Association for Homes and Services for the Aging, leaders of CARF and CARF-CCAC presented several well-received sessions. For more information regarding any of these presentations, or for other information that was shared at this annual meeting, please contact the CARF Aging Services staff, or visit us online at [www.carf.org/agingconference](http://www.carf.org/agingconference). CARF thanks those leaders who served as outstanding speakers on these presentations.

Seminar 133-E: An Accreditation Journey to Organizational Excellence

Date: 10/18/2011

Time: 11 a.m. -12:30 p.m.

Track: Management & Operations

Speakers: Michael Flynn, Chief Executive Officer, Smith Senior Living, Chicago, IL; Susanne Matthiesen, Managing Director, Aging Services and CCAC, CARF International, Washington, DC

This session offered comparative data from accreditation surveys that can be used as a framework for quality improvement initiatives. Presenters discussed how frequently cited accreditation standards can inform ongoing performance improvement efforts within organizations.

Seminar 139-G: Consumer and Staff Satisfaction: Are You Measuring Up?

Date: 10/19/2011

Time: 11 a.m.-12:30 p.m.

Track: Management & Operations

Speakers: Susanne Matthiesen, Managing Director, Aging Services and CCAC, CARF International, Washington, DC; João Pimenta, Chief Operations Officer, Centro de Medicina de Reabilitação do Sul, Sao Bras de Alportel, Portugal

This session offered information about uSPEQ® ([www.uspeq.org](http://www.uspeq.org)), which is a scientifically tested reporting tool designed to gather consumer and staff satisfaction information. Presenters explained how providers in Portugal and Ireland are using this system to improve service delivery and enhance workforce excellence. Specific examples of ways satisfaction findings can be used to inform integrated strategic planning and performance improvement efforts were provided.

Seminar 72-H: Financial Ratios: Benchmark Data for the Field

Date: 10/19/2011

Time: 3-4:30 p.m.

Track: Financial Management

Speakers: Jeff Boland, Partner, Reinsel Kuntz Leshner LLP, Lancaster, PA; Karen Christiansen, Senior Vice President, Finance, ACTS Retirement-Life Communities, West Point, PA; Michael Connell, Chief Financial Officer, Asbury Communities, Inc., Germantown, MD; Michael Kelly, Managing Director, Ziegler Capital Markets - Southeast, Jacksonville, FL

Based on the findings included in the *Financial Ratios and Trend Analysis of CARF-CCAC Accredited Organizations*, this session analyzed key financial ratios and how they help management of continuing care retirement communities assess organizational effectiveness. Presenters examined how ratio analysis can be used to obtain macro-level indicators of overall operational and financial performance. Tips regarding ways to use benchmark data to communicate successes to leadership, persons served, and other stakeholders were shared by financial professionals of two different accredited organizations.

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## 2011 financial ratios and trend analysis publication

*Financial Ratios and Trend Analysis of CARF-CCAC Accredited Organizations* is a one-of-a-kind reference, including the most recent ten years of analyzed information from the audited financial statements of multiple CARF-CCAC-accredited organizations. Ziegler, ParenteBeard LLC, and CARF-CCAC collaborated on this project to define, calculate, and explain the included graphs, tables, and charts for each financial ratio. This publication provides valuable industry benchmarks, allowing readers a unique opportunity to view the financial trends resulting from a number of factors, including provider growth, account challenges, operating challenges, and regulatory challenges.

The publication's ratios are available for CARF-CCAC-accredited organizations to use as

points of reference for developing internal targets of financial performance, but only after evaluating their own specific marketing, physical plant, and mission/vision considerations. It is anticipated that others will use these ratios, particularly within the capital markets, to learn about the financial positions of organizations that have been through CARF-CCAC's accreditation process. The ratios can also be used as benchmarks against which to evaluate nonaccredited organizations and gain a deeper understanding about the sector as a whole.

The ratio trends publication is now available for purchase at the CARF bookstore ([bookstore.carf.org](http://bookstore.carf.org)) for \$140. CARF-CCAC-accredited organizations should have received their complimentary copy by mail.

CARF-CCAC values and encourages your feedback as we work to continue to improve this publication. Please take a moment to complete our feedback form located at: [www.surveymonkey.com/s/RatiosPublicationFeedback](http://www.surveymonkey.com/s/RatiosPublicationFeedback).

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## New Seal of Accreditation designs released

In response to requests from accredited providers, CARF is releasing new Seal of Accreditation designs, including a Gold Seal version, for you to better promote your accomplishment of achieving CARF accreditation. These logos can be used to identify your CARF-accredited programs and services online and in print.

### New designs:



All versions of the seals are available online at [www.carf.org/logo](http://www.carf.org/logo).

As a resource, CARF provides prewritten [HTML code\\*](#) that displays a Seal of Accreditation for you to copy/paste directly onto your website. Visit [www.carf.org/Online\\_Promotion](http://www.carf.org/Online_Promotion) to browse the new code and template options.

*\*If you currently use the provided HTML code on your website displaying a CARF Seal of Accreditation, the logo should automatically update to the new version on your site.*

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## CARF Canada staffing change

We are pleased to welcome a new member of the CARF Canada staff. Dawn Pickering was hired as a business development executive, CARF Canada, in May. She joins CARF Canada from CNIB (formerly the *Canadian National Institute for the Blind*), where she served as a member of the Service Quality Team and as the Professional Practice Leader for its national Low Vision Service. Although a native Canadian, Dawn lived in Albany, New York, before moving to Ontario in 1996. She was born on Prince Edward Island and also lived in Halifax, Nova Scotia.

As the business development executive for Central and Eastern Canada, Dawn's position involves a variety of responsibilities, including, but not limited to, cultivating relationships with stakeholders and decision makers; providing education to the public and governmental agencies regarding standards and accreditation; representing CARF Canada at Canadian conventions, conferences, and association meetings; and assisting organizations that are interested in pursuing accreditation.

Dawn can be reached at CARF Canada's Toronto office:

1 Yonge Street, Suite 1801  
Toronto, ON M5E 1W7  
Email: [dpickering@carf.org](mailto:dpickering@carf.org)  
Toll free: (888) 281-6531, extension 3010  
Fax: (520) 319-3010

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## Transforming Outcomes Data into Management Information Institute

Transforming Outcomes Data into Management Information Institute is a three-day training institute that 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.
- Identification of areas for quality improvement activities based on findings.

As service providers, customer satisfaction is one of the keys to success. Understanding the needs and wants of persons served comes from various data collection, but keeping them happy with effectiveness, business efficiencies, and quality services also comes from data analysis and performance improvement. This institute can give you a hands-on approach to proficiency training for analysis and interpretation of 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 training institute includes

different computer lab groups to meet the learning needs of participants with a broad range of computer and data analysis expertise.

This how-to institute is intended for individuals of various backgrounds, from those who are involved with the design or analysis of information to those who are responsible for the interpretation of outcomes data within health and human services. The Transforming Outcomes Data into Management Information Institute is appropriate for administrators, data managers, directors of quality improvement, program managers, information management specialists, and direct service providers. It is useful for both the quality improvement (or data) manager and executive director or decision maker to attend. The institute is also applicable to all CARF-CCAC and Aging Services programs, including adult day services, assisted living, person-centered long-term care communities, home and community services, and continuing care retirement communities.

The next Transforming Outcomes Data into Management Information Institute is around the corner and will take place January 26-28, 2012, in Tucson, AZ. Space is limited so get your registration in early. For more information or to register, visit our website at:

[www.cvent.com/events/2012-transforming-outcomes-data-into-management-information-institute/event-summary-5d1a9ccadac1497b885b7654d8b3a247.aspx](http://www.cvent.com/events/2012-transforming-outcomes-data-into-management-information-institute/event-summary-5d1a9ccadac1497b885b7654d8b3a247.aspx)

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## Education on the changes to the 2012 ASPIRE to Excellence® standards

For organizations preparing for a survey in the second half of 2012 and using the 2012 CARF-CCAC or Aging Services standards manual, please be on the lookout for the publication of the 2012 CARF-CCAC and Aging Services standards manuals, which should be available toward the end of January 2012. The 2012 CARF-CCAC and Aging Services standards manuals are used for all on-site surveys (originals and resurveys) scheduled between July 1, 2012, and June 30, 2013.

CARF-CCAC and Aging Services will be providing education focused on the changes to the 2012 standards manuals through a webinar on March 1, 2012, at 1 p.m. EST titled, "Changes to CARF's ASPIRE to Excellence® Standards." National Association of Boards of Examiners of Long Term Care Administrators (NAB) credits will be offered for this webinar. To register, or for more information, visit:

[www.cvent.com/events/as-ccac-webinar-changes-to-carf-s-aspire-to-excellence-standards/event-summary-8fc9e0a8c82b4117bc34acf5333ff996.aspx](http://www.cvent.com/events/as-ccac-webinar-changes-to-carf-s-aspire-to-excellence-standards/event-summary-8fc9e0a8c82b4117bc34acf5333ff996.aspx)

To learn more about CARF-CCAC and Aging Services 2012 education opportunities, visit [www.carf.org/events](http://www.carf.org/events). If you have any questions, please contact CARF-CCAC toll free at (866) 888-1122, and we will gladly assist you.

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## Upcoming events

- [2012 Transforming Outcomes Data into Management Information Institute](#), January 26-28, in Tucson, AZ. Training co-sponsored by CARF and Boston University School of Public Health.
- [Changes to CARF's ASPIRE to Excellence® Standards](#) webinar, March 1, 1-2:30 p.m. EST. During this session, participants will hear about standards that received significant changes from the 2011 to the 2012 standards manual edition and how those changes will affect providers preparing for accreditation.
- [AS/CCAC 101: Preparing for Successful Accreditation in Aging Services and Continuing Care Accreditation Commission](#), March 26 and 27, Phoenix, AZ. This two-day workshop is designed for organizations that are seeking CARF accreditation for the first time or preparing for reaccreditation.
- [Introduction to Financials webinar](#), May 8, 1-2:30 p.m. EDT. This webinar will be co-presented by members of the Financial Advisory Panel and CARF staff. Aging services providers who are looking for a basic understanding of financial statements and how to use financial information for effective management are encouraged to participate.

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If you have suggestions for content to be included in a future issue of Continuing Communication, please email the editor, Rebecca Best, at [rbest@carf.org](mailto:rbest@carf.org).

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[www.carf.org/aging](http://www.carf.org/aging)

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