

Continuing Communication

Aging Services News

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In this issue:

[CARF Releases the 2015 Financial Ratios & Trend Analysis of CARF-Accredited Continuing Care Retirement Communities](#)

[Julia Meashey Joins CARF's Aging Services Team](#)

[Savoring Social Interaction This Holiday Season](#)

[Coaching Corner: Advancing the Delivery of Services Using Information and Communication Technologies \(ICT\)](#)

[Tom Gibbons Joins CARF's Financial Advisory Panel](#)

[Congratulations to accredited award recipients](#)

[2016 Aging Services Educational Opportunities](#)

CARF Releases the 2015 Financial Ratios & Trend Analysis of CARF-Accredited Continuing Care Retirement Communities



Financial Ratios & Trend Analysis of CARF-Accredited Continuing Care Retirement Communities is a one-of-a-kind reference, including the most recent ten years of analyzed information from the audited financial statements of multiple CARF-accredited CCRCs. Ziegler, Baker Tilly, and CARF 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, operating challenges, and regulatory changes. CCRCs

can use these financial ratios as points of reference for developing internal targets of financial performance. Remember that individual marketing, physical plant, and mission/vision factors should be taken into consideration before developing such targets.

Readers representing groups other than CCRCs, particularly those in capital markets, may use this publication to learn about the financial positions of CCRCs that have earned CARF accreditation. 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.

CARF-accredited CCRCs should have received their complimentary copies of the ratio trends publication by mail. It is also [available for purchase at the CARF online store](#).

[Back to top](#)

Julia Meashey Joins CARF's Aging Services Team

Julia Meashey has joined CARF's Washington, D.C., office as the administrator of operations for Aging Services. In a career focused on gerontology and aging services advocacy, joining CARF is an exciting next step for her. "I'm excited to be a part of the CARF team and focusing on the role of accreditation in ensuring quality care and services for older adults and their families," says Julia.



Julia has a Master of Arts degree in Gerontology, and using her knowledge of the aging process and aging services has been an important goal throughout her career. She initially specialized in aging services advocacy when working as a regional long-term care ombudsman in Winston-Salem, North Carolina, and in 2001, she began to work with The National Long-Term Care Ombudsman Resource Center. She did not hesitate to relocate to Washington, D.C., where she has been ever since.

After six years providing technical assistance and training for the national network, Julia decided to shift her focus toward translating aging research into quality services. For nearly eight years, she worked with researchers and academic leaders in the fields of geriatric social work, nursing, and medicine while serving as a program manager for the National Center on Gerontological Social Work Excellence and then later the director of operations for the Hartford Change AGENTS Initiative at The Gerontological Society of America®.

Julia's role as the administrator of operations includes serving as the liaison to CARF's Financial Advisory Panel, overseeing business processes related to aging services accreditation, and providing education and technical assistance on accreditation processes and standards to various audiences. Julia may be reached via email at jmeashey@carf.org and at extension 5008.

[Back to top](#)

Savoring Social Interaction This Holiday Season

The fall and winter holidays offer opportunities to bring friends and family together. Over the next few months, you will likely attend or host a holiday party and enjoy festivities with special food,

colorful decorations, and gift giving. But this active time of year may also make you more aware of individuals in your communities who do not have friends and family. The holiday season can be a challenging time for people who are grieving the loss of friends and loved ones. The holiday season is also often when families become more aware of an aging relative's need for care and assistance.

There is a wealth of resources available that can help address these concerns and challenges, and provide assistance to friends and family members. For example, a recent blog feature on [Next Avenue](#), a PBS media source that focuses on issues related to aging, provides tips for having a good visit with aging parents. The article, titled "[How to Visit Your Aging Parent the Right Way](#)," features Katherine Arnup, a retired professor and now life coach and hospice volunteer. It describes how her experience with her parents educated her about the importance of "being present" during her visits. The tips and advice she offers are good reminders to slow down, savor, and enjoy our social interactions during this often frenetic season.

Below are a few additional sources of tips and information about making the most of visits to aging friends and relatives, responding to increased needs for care, and coping with grief and loss:

- The National Institute on Aging's (NIH) "About Alzheimer's Disease: Caregiving" [tip sheets and resource lists](#) (downloadable in a variety of formats). Check out the one titled "Alzheimer's Caregiving Tips: Holiday Hints."
- The National Center on Elder Abuse (NCEA) [tip sheet](#), titled "Home for the Holidays."
- The Substance Abuse and Mental Health Services Administration (SAMHSA) [toolkit](#) titled "Promoting Emotional Health and Preventing Suicide."

[Back to top](#)

Coaching Corner: Advancing the Delivery of Services Using Information and Communication Technologies (ICT)



The relevance of ICT is progressively increasing in every aspect of modern life. ICT is an important avenue to boost service delivery, improve living standards, and allow innovative growth as populations age and workforces continue to shrink. ICT can help older people to stay healthy, independent, and active by allowing easier access to services. It has the potential to increase access to social welfare services, regional activities, and educational opportunities by removing the

barrier of limited mobility or community access. Due to the increasing use of ICT in this sector, CARF has developed quality standards to specifically address this area.

Standards 1.J.2. through 1.J.8. are new in the technology section of the 2015 CARF standards manuals and address service delivery via the use of ICT. The provision of services via ICT involves the use of interactive audio and video telecommunication systems to permit real-time communication between a clinician/provider and a person served at differing locations. Use of these technologies might be based on the individualized plan for the person served and allows providers

to see, hear, and interact with persons served, family and support system members, and other providers in remote settings.

Services delivered through ICT might include:

- Remote monitoring of persons served, which could include the collection of vital signs and health progress data from individuals with chronic conditions and the transmission of those data to a provider in a separate location.
- Online medical consulting services for persons served to have virtual meetings with physicians. Individuals may obtain second opinions, palliative support, online referrals, assessments of medical history, other types of self-assessments, or treatment intervention modules that do not require person-to-person interaction.
- Promotion of healthy behaviors, delivered through alerts or reminders on a mobile device or app. Similar devices could also be used for remote case management, including vital signs monitoring, behavioral health assistance, or diet and weight loss tips.
- The use of monitoring devices, or even “smart” clothing, to alert caregivers when persons served need assistance.

Services performed through ICT can use a wide variety of formats or programs. They might involve common apps such as Skype™, computer-based webcams, or even programs developed specifically for an organization.

The ICT standards were developed to ensure that organizations using this type of technology have appropriate policies and procedures in place to address topics such as consent, security, privacy, when the use of this technology is appropriate, equipment sanitation and maintenance, personnel education, user support, and emergency procedures. The new standards are not applicable to use of technology strictly for informational purposes, such as posting general information on an organization’s website or conducting marketing via email communications.

If your organization uses ICT, you will benefit from implementing CARF’s standards. Accredited organizations are required to be implementing these new standards now even if they are not being surveyed this year.

Please contact Bonnie Rock (brock@carf.org) or Cathy Rebella (crebella@carf.org) in CARF’s Aging Services customer service unit if you have questions regarding these standards.

Additional helpful materials:

- American Telemedicine Association: www.americantelemed.org
- VA Telehealth Services: www.telehealth.va.gov/real-time
- International Journal of Telerehabilitation: www.telerehab.pitt.edu/ojs/index.php/Telerehab
- U.S. Department of Health and Human Services Health Resources and Services Administration Rural Health: www.hrsa.gov/ruralhealth/telehealth/index.html
- U.S. Department of Health and Human Services Centers for Medicare & Medicaid Services Telehealth Services:

www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/TelehealthSrvcsfctsh.pdf

- Center for Connected Health Policy The National Telehealth Policy Resource Center: www.cchpca.org
- JRC Scientific and Technical Reports; *Active Ageing and Independent Living Services: The Role of Information and Communication Technology*
<ftp://s-jrcsvqpx101p.jrc.es/pub/EURdoc/JRC41496.pdf>
- *Innovation and Technology for the Aging*, by Craig A. Lehmann, Jean Marie Giacini, and Dianne Davis
www.un.org/esa/socdev/egms/docs//2013/ict/innovation-technology-ageing
- Article: “4 Types of Telehealth Solutions,” by Jasmine Pennic
www.hitconsultant.net/2015/08/13/4-types-of-telehealth-solutions

[Back to top](#)

Tom Gibbons Joins CARF’s Financial Advisory Panel

CARF is pleased to welcome Mr. Thomas Gibbons to the Financial Advisory Panel (FAP). He is a senior vice president and the senior portfolio manager for Huntington National Bank’s Not-For-Profit Continuing Care Retirement Community (NFP CCRC) segment. He brings extensive finance expertise to the FAP with more than 25 years of experience as a credit and portfolio manager in leveraged finance transactions, restructures, and corporate banking and has specialized in the senior living sector for the past ten years. He authored Huntington’s original credit policy for NFP CCRCs. He and his staff are responsible for underwriting and managing the bank’s credit exposure in the NFP CCRC sector. This is part of the bank’s Health Care and Social Assistance portfolio, which totals more than \$1.9 billion with more than 150 relationships.



Throughout the years, Mr. Gibbons has been a proponent of CARF accreditation. When asked specifically about the value of CARF accreditation in the senior living sector, he states, “Huntington believes that the CARF accreditation process assists us in recognizing higher-level operating and strategic competence. We take into consideration CARF accreditation in our proposed structure and pricing on transactions as we believe CARF-accredited organizations reduce our risk.”

Mr. Gibbons has been a speaker at the LeadingAge™ Annual Meeting and Expo, Ziegler’s Senior Living Finance and Strategy Conference, and other national conferences. He has also been a speaker at several state LeadingAge conferences. Prior to joining Huntington Bank in May 2000, his work experience included Citicorp, J.P. Morgan (First Chicago Corporation), Bank of America (Standard Chartered Credit Corp), and The FINOVA Group, Inc.

Mr. Gibbons holds a Bachelor of Arts in Economics from Albion College in Michigan, and received his Master of Business Administration in Management and Finance from Wake Forest University in North Carolina. His office is located in Grand Rapids, Michigan, but he and his staff cover the entire Huntington footprint related to the NFP CCRC segment, which includes six primary states plus nine other contiguous states.

[Back to top](#)

Congratulations to accredited award recipients

The following CARF-accredited long-term care homes were honored by the Ontario Long Term Care Association (OLTCA) with a 2015 excellence in quality and innovation recognition:

- Sienna Senior Living
- The O'Neill Centre
- Trinity Village
- Caressant Care Fergus
- Schlegel Villages

Read more in the OLTCA press release: http://www.oltca.com/OLTCA/OLTCA/Public/MediaEvents/News_Releases/LTCQualityInnovationAwards.aspx

Additionally, Springpoint Senior Living, which operates CARF-accredited community Meadow Lakes, received the Excellence in the Workplace Award from LeadingAge. Read more at:

http://www.leadingage.org/Presenting_the_2015_LeadingAge_National_Award_Winners_V5N5.aspx

If you or your organization has received an award that you would like CARF to be aware of, please contact editor, Tonya Tobe, at ttobe@carf.org.

[Back to top](#)



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.

April 20–21, Charlotte, NC
AS101: Preparing for Successful Accreditation in Aging Services
Registration coming soon

Webinars

March 29 & July 12
Changes to CARF's Aging Services standards manuals
Registration coming soon

April 12
Overview of CARF's Network Standards
Registration coming soon

For questions, 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.

[Back to top](#)

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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