



Senior Housing Network Annual Planning Meeting  
October 27-28, 2011  
Sister Bay, Wisconsin

## Summary

Members of the Senior Housing Network (CBRFs, RCACs, and Independent Living Facilities) came together on October 27-28, 2011 for two days of generative thinking, intense discussion, strategic visioning, and future planning to facilitate the association's efforts to best serve member/subscriber assisted living and independent living facilities.

The meeting began with a general overview of the association's services and a brief discussion of where we are now. Mashak reported that LeadingAge Wisconsin provides an array of core services that can be grouped as follows:

- Advocacy -- including representing the interests of members in areas such as rules, regulations, representation, reimbursement, interpretations, property tax/mission preservation, and serving as the collective voice of the members.
- Education -- including conferences, seminars, webinars, RCAC/CBRF Managers Comprehensive Training Program on DVD, assisted living staff education training modules, and offerings through *Echelon – Leading the Way* with recent offerings related to Lean, leadership, dementia training, and electronic charting.
- Member Services and Support

Member Services and Support for assisted living and independent living professionals have increased significantly over the past few years, and have been developed and shaped by the ongoing efforts of the Network. The following achievements are particularly worthy of note:

- This association submitted the first application to be approved by the State of Wisconsin for the Wisconsin Coalition for Collaborative Excellence in Assisted Living. Our approved program has won accolades from the state for our exceptional Customer Satisfaction Survey Tool, Family Satisfaction Survey Tool, Leadership Development, and Peer Support. The program also incorporates separate but related services for both RCAC and CBRF providers and offers network members services, tools, and resources specific to their licensure type, as well as a listserv, website, benchmarking, and examples of what others are doing. Currently, there are 75 facilities participating in the RCAC Quality Improvement Network and 81 facilities participating in the CBRF Quality Improvement Network.

- Network services for independent living professionals include the resource clearinghouse, surveys, quick questions, meetings, tours, a listserv, leadership development, and peer support.
- Other Member Services and Support include additional networking opportunities, a legal hotline, a clinical hotline, the awards program, advocacy and marketing DVDs, special publications, website resources, and committee participation.

Mashak reported that new initiatives already are underway to shape the future of LeadingAge Wisconsin. Some of these include:

- WCRC for Assisted Living
- Further Development of *Echelon - Leading the Way* (our leadership and training institute)
- Pre-conference Tours & Seminars
- Resident Assistant Training Guide
- ILF Webinar Series
- Mentor Program
- Adult Day Care Network
- Technology Resources, Policies & Procedures
- A New Website

Following the brief overview of where we are and where we are going, network members engaged in a discussion of what's working, what's not, and what's missing.

What's working:

- The Listserv: Members like getting all the questions and answers from everyone; however, we need to continue to stress the value and importance of having people include their name and email address on their replies to listserv inquiries.
- Network Meetings: Sharing ideas and touring other facilities is very valuable.
- The Legal Hotline is a great asset.
- Webinars are a valuable addition to the educational offerings. All staff get to hear the same thing. One facility blocks a 30-minute session immediately following the webinar for further discussion.
- The Virtual Dementia Training was great. Many indicated they will be sharing this with staff, family, volunteers, support groups, and community members.

There were no comments regarding what's not working.

Network participants suggested the following as services that are not yet offered but which many would find useful/valuable:

- Adult day care networks and resources
- Information on how to lead a dementia support group

At this point, the network participants delved into a series of generative questions to get them thinking about the future of aging services and what we (individually and collectively) need to begin doing to position ourselves for success in the future.

**Generative Question: Here we are in 2011. By 2015, Boomers will make up at least 51% of the over-65 population. When will we see boomers in our settings?**

Currently, the average of upon admission is 82 to 85 years old, so it probably will be a few years before we see a major influx of the Baby Boomers in our facilities. In HUD facilities, however, we already are seeing a younger group.

**Generative Question: What impact will Baby Boomers have on our organizations, our employees, and the services we provide?**

Statistics indicate that Boomers probably have not saved as much as their predecessors. This will impact their financial status as they begin to think about residency in our member facilities. Boomers' children live in a more mobile society, so they have moved further away from their parents, leaving the Boomers with less family support in their immediate vicinity. There also is a concern that, statistically, there will be a larger group of Boomers afflicted with dementia. Generally, Boomers have a higher education and higher expectations than their predecessors. There is a feeling that they will want/expect more socialization, more activities, and more transportation services. They will expect more services, such as WIFI, extended dining options and times, etc., and they will be more demanding. They will expect updated facilities, they will be less accepting than their predecessors, but they might not be able or willing to pay increased fees that go along with all the updates, upgrades, and enhanced services. There is the feeling that if providers cannot meet these expectations, the Boomers will leave the facility or choose another location before even moving in.

This will impact how we market to Boomers. While word-of-mouth will continue to be important, the Internet will continue to have an increasingly important role. We will want to consider a wellness focus and integrated wellness programs. We will need to think about diversity in religious offerings and "new age" type services, such as yoga, acupuncture, and alternative medicine. We probably will have to offer a variety of settings and activities to appeal to the diverse range of interests among Boomers. Boomers like specialty coffees, coffee shops, eating out. They want choice in all things, including apartment sizes. They want fresh and they are heart-healthy. Concierge services might be an option, and we could partner with community members to provide services such as "independent living with a safety net." This could encompass services such as maintenance on call, housekeeping, meals, call service, arrangements for transportation, wellness nurse, and parking garages. Social networking will continue to be increasingly important.

Aging service providers might want to begin thinking about new services. Food service should encompass more choices, healthier choices, increased serving times, and expanded dining options. We need to consider space utilization and how we could offer spa services, yoga, and a

fitness center. Activity staff might need to change their focus and give greater consideration to smaller groups and increased spontaneous activities. Increased social networking means we will need to plan for electronic socialization among the Boomers.

Finances will continue to be a concern. Boomers might or might not have access to public programs such as Family Care, but they still will be demanding of services and choices. We might need to change the configuration of our units to accommodate the changes in financial assets (increased options for smaller units, which will be more economically feasible).

The question is, can our campuses meet the diverse requests for services that will come with the Boomers. If not, we have the option of partnering with other resources available in the community to, for example, provide transportation or to offer fitness services and equipment.

**Generative Question: Baby Boomers are the children of the residents we currently serve. How are the families of our current residents changing their expectations of us as providers?**

Family members are more aware and educated regarding options, especially if their parents have been in more care settings. Family members are involved in planning, they expect marketing materials in a variety of different formats, and they are more apt to look into long term care insurance. Families today are more familiar with social media and social network marketing. This means facilities will need to increase their presence on sites such as Facebook and Twitter (and they will need to be aware of the implications of social media in light of regulations such as HIPPA). Providers also might want to consider developing a virtual tour of their facility to include on their website and a DVD to send to interested families.

Boomers are expecting us to do more, and they want us to arrange it all. They expect providers to accompany residents to the doctor, to arrange for transportation, and to provide other additional services as wanted or needed. They want us to communicate to all family members instead of family members communicating with each other. They want the services, but they don't want to have to pay for them. Providers are seeing an increase number of people coming in with outstanding mortgages, and people more frequently are asking if the provider will take their house as equity since the real estate market makes selling the house very difficult.

**Generative Question: What impact is the economic downturn having on our organizations, our employees, our services, and our residents? What can we do differently to weather this economic storm so that we are around in the future to serve the tidal wave of Boomers coming our way soon?**

Members are struggling, and the economy impacts nearly every decision we make. Do we go forward with remodeling and building projects in an effort to stay competitive with modernized buildings, or do we put building and remodeling on hold to avoid going further in debt and further straining financial resources? Providers are being forced to cut employee hours and employees already are struggling and stressed as they try to make ends meet, and at the same time more adult children who cannot find a job are moving back home to live with their

parents. More than ever, organizations need to look at strategic planning, especially strategic plans that include contingency plans and a flow chart with different options depending on the economy (if this, do this...).

Perhaps the answer is that we need to recognize the fact that we cannot be all things to all people and focus instead on serving a specific sector of the market. Perhaps increased and future services will be more of an expectation and less of a physical plant change.

We might need to change how we look at the finances of prospective tenants/residents. Should providers require a certain amount of money before allowing a new resident/tenant to move into the campus? Providers will need to conduct more thoughtful pre-screening. They will need to consider benevolence, false impoverishment, and the balance of Family Care versus private pay with so many empty beds. Group discussion focused on the pros and cons of Family Care as well as the ethical implications of Family Care and relocation options when funds change.

## **Sustaining Ourselves Beyond 2020**

We need to begin now to education our boards and to educate the community. We need to enhance our efforts in the area of culture shift. We need to try to get the community to understand our struggles, and we need to open the eyes of the Baby Boomers. We need to lead the Boomers and to educate them about the reality of their future.

- We could consider becoming Retirement Care Consultants with the goal of helping people to live where they want to be now so that when they need care, we are their first consideration. We could offer assessments to those living in the community and advise people on the care and services they might want to consider and the resources available to help them stay in the community longer. We could enhance our care management programs to help people stay longer at the lowest level of care.
- For the future, we could consider developing individualized wellness programs as residents come in. These individualized wellness programs would be reviewed annually to help people stay healthier longer, thus saving money and enhancing our sustainability.
- We need work towards a culture shift within the community. We can utilize the resources we already have available -- we can be "athletic trainers" for seniors in the community. We can provide education regarding dementia, falls, health issues, etc. We need to find ways to bring the community into our facility such as hosting programs and public events that are open to the community, or perhaps opening a coffee shop or sandwich bar that is readily accessible to the community. We also could offer that community members can ride the facility bus to outings if space is available. The more the community gets to know us, the more comfortable they will be with us.
- We need to partner with outside organizations to increase the offerings and the value of services

- Perhaps we should consider changing what is considered “bundled amenities,” and make adjustments to feature some things as a “paid service.”
- We might want to consider changing our restaurant hours.

## What Does All This Mean for Assisted Living?

### Priorities & Goals for 2012

Participants talked at length about the future of assisted living in Wisconsin and what the association and members/subscribers can begin doing now to be prepared and equip providers for the future. Following is a list of the options and possibilities discussed:

- We need to enhance our outreach activities so that we meet prospective residents where they are right now. This will enable us to better support and guide their journey. We could use guidance on how to get more involved with the community. We need more emphasis on marketing and public relations. Help members understand what outreach is and how to do it. We really need something fresh on marketing.
- Could the association help members learn a better system for following up on leads -- a systematic approach to leads management from lead to move in?
- Provide educational opportunities (through webinars or a conference series) on strategic planning for staff. It would be helpful if staff members knew the stages of strategic planning and if we knew how to get staff buy-in on the organizational strategic plan.
- Our activity programs need to change. We need a greater emphasis on wellness. We need to figure out how to provide more activities on a tighter budget -- more activity “things,” more sophisticated activities, more transportation -- all with no more money in the budget.
- Case management presents many new opportunities for us. This could include many services such as insurance billing, navigating the different payer services, facilitating the move, getting involved on the front end, concierge services, and many more.
- For most residents, meals are the highest priority. Members would like to learn how to enhance their dining programs without adding higher expenses to the budget.
- Could LeadingAge Wisconsin offer a webinar on how to write a program statement?

- Members suggested the following as potential new RCAC Quality Initiatives:
  - Charting
  - Risk agreements when there is no risk -- Could Kevin Coughlin do an educational session on risk agreements?
  - What to do when there is a death of a resident, including the immediate threat of death of a resident who has a DNR order.
- Members would like more useable information related to the IRIS program.
- Another area of need is communication technology -- How do you communicate what's going on to everybody?
- Members would appreciate information and services related to Quality Committees and Quality Programs for assisted living.

### **Building New Energy for the Network**

To continue growing the network, member suggested the association assist with a “Member Bring a Member” program for network meetings. Interested network members could offer to call and invite to the next network meeting a non-network member or a network member who has not been attending the meetings, and even could offer to car pool to the meeting. The association’s role would be to maintain a list of the network members who are not participating in the meetings and partner them with an active network member who would be in close proximity (for car pooling purposes).

Participants suggested the association reach out to network members who are not attending the meetings to inquire why they are not attending. They also suggested that staff enlighten the CEOs (through their network meetings) about the benefits and advantages of sending people to the other network meetings.

Participants also suggested that network members be reminded at every network meeting to utilize the listserv and the appropriate protocols for using the listserv.

### **Network Meetings for 2012**

Participants found the meetings for other assisted living professionals throughout 2011 to be very beneficial, and they would like to continue these meetings throughout 2012.

Suggested topics for the activity professionals are:

- Creative Program Ideas
- Baby Boomer Activities
- Technology in Activity Programming
- Routine versus Flexibility in Program Scheduling

- Friendships versus Confidentiality -- Professional Boundaries
- Working with Volunteers
- Programming Outside Your Comfort Areas

Suggested topics for the foodservice professionals are:

- Baby Boomers
- Getting Resident Feedback without Bending to Complainers
- Expanding Hours/Restructuring Programs
- Resident Choice-Oriented Dining Programs: How To Do It (salad bar, fresh fruit bar, etc.)

Suggested topics for the maintenance professionals are:

- Baby Boomers
- Refreshing Rooms
- Working within Your Blueprint
- Professional Boundaries
- Putting Residents First -- Day-to-Day Priorities

Suggested topics for the nursing professionals are:

- Avoiding Burnout/Taking Charge of Your Life
- Required Training and Education -- Resources
- Communicating with the Aides
  - Resident-Centered Care/Resident Choice
  - Adapting to Changing Resident Needs
  - CNA Burnout
- Social Networks/Professional Boundaries (Ombudsman: Amy Panosh)
- Dealing with Loss and Grief

## **2012 Conference Topics**

Assisted living network participants suggested the following as potential conference topics for 2012:

- Harnessing Volunteers in Assisted Living
- Staff recognition without Money
- Professional Boundaries -- Technology
- Leading Indicators for Changes in Your Marketing
- Marketing and Social Networking
- Alzheimer's Model Home
- Staging -- Helping the Resident Move In, Creating a Nice Apartment
- Welcoming the Resident; Transitioning
- Website Makeover

## Potential Webinar Topics

Assisted living participants suggested the association consider the following topics for webinars:

- Strategic Planning -- Transitioning into the Strategic Plan -- Getting Staff Buy in for the Strategic Plan
- Transitions for Residents and Families

***Assisted living network participants concluded that, of all the potential opportunities listed above, the highest priority for 2012 is more information and services related to outreach and marketing.***

- Focus on anything that will help us get people into our building
- Update the Community Education Programs
- What could residents offer to people in the community? (knitting, crocheting, quilting, wood working, etc.)
- Could providers offer dining or foot clinics to people in the community?
- Beauty shop, coffee shop, sandwich shop
- Junior Prom
- Others

## What Does All This Mean for Independent Living?

Independent living professionals participating in the meeting talked at length about the future of independent living in Wisconsin and what the association and members/subscribers can begin doing now to be prepared and to equip providers for the future. Through this discussion, participants concluded that individual providers should begin to consider:

- Involving the tenants in the discussion regarding how we need to change services.
- Adjusting the capital budget.
- Placing a stronger emphasis on customer service and marketing to make the public aware of what we offer.
- Changing/adjusting the fee structure.

Discussion also focused on what new services the association might want to consider to assist independent living providers as we move into the future. Following are the highlights of this portion of the discussion:

- Could LeadingAge Wisconsin develop some type of accreditation system or a type of “seal of approval” for independent living providers, comparable to WCCEAL, that members/subscribers could use as a marketing tool?

- LeadingAge Wisconsin could consider some type of education program regarding “for-profit versus not-for-profit,” focusing on the philosophy of both, what the difference is, and what the difference means for the tenants and for the community.
- The group discussed the concept of developing quality initiatives for independent living. After further discussion, however, the group decided this was not realistic because there is no basis for developing quality initiatives. Each facility is different and there is very little in the way of “requirements” by which to measure and compare.
- Participants would appreciate additional networking opportunities.
- Independent living professionals would truly benefit from any services that would enable them to develop and implement better “sales skills.”

At the end of this phase of the discussion, participants concluded that the top three focuses for member/subscriber independent living organizations are:

- Fiscal viability
- Marketing
- Socialization

### **Priorities & Goals for 2012**

*The highest priority for 2012 for the independent living is a full conference track on sales training for independent living providers.*

The group would like this to be an entire track at an upcoming conference with four to six sessions of intense training. Questions/topics they would like to have addressed as part of the program include:

1. What should your sales program look like?
  - a. What skills are needed
  - b. Job descriptions/responsibilities of the sales person or sales team
  - c. Old metrics/sales expectations compared with the new market
2. How is “sales” different than “marketing”
3. “Closing the Sale” and skills needed for that final step
  - a. Leads management
  - b. Electronic data bases
  - c. The role of social networking (facebook, twitter, linked in)

This is a suggestion from the group as to how they would like the training series to be set up:

- 1<sup>st</sup> session:
  - Why a sales team is essential—Financial success depends on sales
  - Realistic expectations for turnaround time

- This 1<sup>st</sup> session could be geared to administrators, CEOs, and board of directors, as well as the individuals and teams responsible for sales
- 2<sup>nd</sup> session:
  - The distinction between sales and marketing
- 3<sup>rd</sup> session:
  - What does the sales office look like
    - Responsibilities
    - Expectations
    - How to evaluate effectiveness (ROI, business development)
- 4<sup>th</sup> session:
  - Leads management
    - Nuts and bolts of leads management
    - The role of social networking
- 5<sup>th</sup> Session
  - Closing the Sale

The group stressed that they would like to focus not so much on education regarding each area, but on how it all “flows together.” The quote was “What we need to do , but not how to do it.”

At a later time, the independent living professionals also would like a conference track focusing on wellness.

- Available tools to assess wellness
- Programs to promote wellness
  - Brain fitness
  - 6 elements of healthy living
  - Other ideas

### **Network Meetings for 2012**

The group identified the most important network meeting topic for 2012 as:

- How do you adjust your “bundled services/amenities packages”?
- How do you inform your tenants?

Additional topics to be combined and covered at network meetings include:

- Using our available resources (current residents) to offer expanded programming for activities
- Employee responsibility/stewardship in reducing costs

Both Steve Komp (Lutheran Homes of Oshkosh) and Sue Seegert (Oconomowoc) have expressed interest in hosting meetings. The group would be amenable to longer meetings, possibly starting earlier and/or working through lunch. The group would like everyone to come

to these meetings with ideas to share and a willingness to participate in the discussion. Further, the group would like structured agendas with time for miscellaneous topics that may arise.

### **Resource Clearinghouse Task Force**

Participants suggested that the Independent Living Facility Resource Clearinghouse Task Force meet mid-summer 2012, at a location to be determined. The total focus of this meeting will be updating and growing the resource clearinghouse.

### **Webinars and Other Ideas**

Participants would find value in a ***webinar focusing on social networking***. Potential issues that could be addressed include:

- Social networking geared to the adult learner -- starting “from the beginning”
- How to do it
- The value of these tools
- Expected time commitments
- Potential concerns (HIPPA, etc)

Participants suggested LeadingAge Wisconsin consider helping the Independent Living Network develop an ***information package*** focusing on educating the “boomers” regarding expectations, economic realities, matching expectations to reality, philosophy, and impact of “not for profit” organizations .

- This information packet could include up to date data.
- The information should come from the association (LeadingAge Wisconsin) rather than from individual organizations.
- The packet could include information about the *philosophy* and *structure* of “for profit vs. not for profit.”
- The packet could include information about benevolence and reinvesting in the community.
- The packet should include information about the impact of the not-for-profit organizations on the individual community.
  - Direct employment
  - “Trickle down effect”- impact on local pharmacies, grocery stores, etc.

The group suggested that if LeadingAge Wisconsin gathered the data and the information, then each organization could use the statistics and information to educate the public

### **Growing the Network**

Recognizing that the larger the network grows, the stronger it becomes and the more useful it will be, participants stressed that it is important to continue working to grow the network. Participants suggested that we utilize the listserv to generate enthusiasm for upcoming

networking meetings. The group again suggested that we enlist the help of the association in convincing the CEOs that attend the CEO Network of the value of the other networking groups.

### **Independent Living Future Oriented Goals**

Looking forward to 2012, the independent living group summarized their priorities as follows:

- Feature a conference track on sales and marketing
- Develop a packet of information to better serve those making the transition
  - Help bridge the gap that exists between having champagne taste but living on a beer budget
  - Help tenants focus on the realities of their high expectations while helping providers stretch their creativity to see how far they can go towards meeting those high expectations.
- Develop an **information package** focusing on educating the “Boomers” regarding expectations, economic realities, matching expectations to reality, philosophy, and impact of “not for profit” organizations.

### **2012 Meeting Dates**

Network participants set the following schedule of meetings for 2012:

- January 6 - RCAC Task Force
- January 27 - AL Network (with Activities)
- February 1 - CBRF Task Force
- February 24 - AL Nurse Network
- March 2 - RCAC Task Force
- March 23 - AL Network (with Dietary)
- Late March -- Independent Living Network
- April 4 - CBRF Task Force
- April 27 - AL Nurse Network
- June 1 - RCAC Task Force
- Early June - ILF Resource Clearinghouse Task Force
- July 18 - CBRF Task Force
- July 27 - AL Network (with Maintenance)
- August 3 - RCAC Task Force
- August 24 - AL Nurse Network
- August/September - Independent Living Network
- September 12 - CBRF Task Force
- November 2 - RCAC Task Force
- November 16 - CBRF Task Force
- November 30 - AL Network

Having addressed all the issues on the agenda, the 2011 Senior Housing Annual Planning Meeting was adjourned.