Disney’s Approach To Service Could Enhance Assisted Living

How can the makers of Mickey Mouse help improve quality in assisted living? Start with Disney’s approach to service and add their teachings on leadership excellence, people management, and employee loyalty, and supporters say there’s a standard of excellence that could transform service and hospitality in assisted living.

“People go to Disney and are made to feel like it is all done for them,” says Andrew Carle, assistant professor and coordinator for the George Mason University (GMU) program in assisted living administration. “People are spending up to $50,000 to live in assisted living. If Disney can make a family feel special on a three-day trip, we ought to be able to do it for every assisted living resident.”

While Carle has used the Disney example of hospitality excellence to inspire employees in hospital and assisted living settings throughout his career, he now has an official connection with the entertainment giant through a partnership that sends GMU students majoring in assisted living administration to study and work at Walt Disney World in Orlando, Fla.

Assisted Living Students Experience Disney

The partnership allows selected GMU students to spend a semester working in a Disney hotel and taking classes in hospitality and human resource management. The internship work and classes are structured around areas of interest shared by both the resort industry and the assisted living profession. Students work in areas such as concierge/front desk, guest relations, food and dining, housekeeping, and transportation services. The students also complete Disney courses, which are approved by the American Council on Education and provide credits toward the student’s degree.

Assisted Living Quality Award Winner

Pilot Program Helps Families Pay For Assisted Living

Crackdown On Medicare Fraud

Recent Congressional Actions

New Commission Forms To Address LTC Workforce Issues

People
Recent Congressional Actions

The Prescription Drug and Medicare Improvement Act currently under consideration by Congress includes a provision to add assisted living facilities to the list of tele-health sites. A tele-health site allows a physician or practitioner to consult via a telecommunications system with an individual enrolled in Medicare.

These Medicare services offer residents and members of the community the opportunity to access health care services without visiting a practitioner’s office. The provision also names as new tele-health sites skilled nursing facilities, board-and-care homes, and other long term care facilities.

In addition, the bill assigns the responsibility of defining “assisted living facility” to the secretary of the U.S. Department of Health and Human Services (HHS). The National Center for Assisted Living will monitor the bill’s progress and work with HHS to ensure that its definition of assisted living is appropriate.

The Senate has passed an amendment to the appropriations bill to increase funding for the Nurse Reinvestment Act and other key Title VIII nursing workforce development programs by $50 million, bringing the total funding for these efforts to almost $163 million.

The amendment, introduced by Sens. Barbara Mikulski (D-Md.) and Susan Collins (R-Maine), would increase federal funding for scholarship and loan repayment programs for nurses who work in facilities with a critical shortage of nurses and cancel education loans for nurses who agree to teach at schools of nursing.

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Continued from page 1

The value of this experience for students in assisted living administration, says Carle, lies not only in their ability to provide a higher quality of care for residents, but also in their attitude as future employees. At Disney, where employees are called cast members, employees are schooled in the “on-stage” approach to guests. Every cast member is taught to stay focused on guest satisfaction and creating a high-quality environment and to put aside personal issues while at work. “The Disney internship can drive home for students that when you are at work, you work for the resident,” says Carle.

The effect on students, he says, is permanent. “Once you learn to do something right, how do you not do it that way?” explains Carle, who sees Disney’s approach as a “perfect deliverable” for assisted living.

The first GMU student to complete a Disney internship agrees. Alex Morales of Fairfax, Va., is a physical therapy assistant by training and spent eight months at Disney’s Caribbean Resort. “Nothing Disney does is by accident,” he says. “There is so much in the way they approach guests that is relevant to the way we should respect and treat seniors.”

Disney Philosophy Works Well In Assisted Living

These successes aren’t news to Bob Van Dyk, president and chief executive officer of Van Dyk Senior Living, who has been using the Disney approach to customer service and employee communication in his assisted living residences and nursing facilities for more than 12 years. Van Dyk was introduced to the philosophy at an executive seminar in 1989, and soon after and many times since has sent key staff for on-site training in Orlando. Van Dyk focuses on Disney’s four keys to business success: employee selection, training, communication, and caring.

“We use the Disney approach in selection of staff, how we train, how we communicate, and how we take care of our staff,” explains Van Dyk, who also serves as vice chair of the National Center for Assisted Living. Staff communication, he says, is among the most important aspects of the philosophy. For example, he personally communicates all major corporate changes to staff, even when that means he attends meetings at four facilities during all three shifts. Van Dyk also hosts luncheons, benefit information and wellness fairs, and holiday events for staff.

In about a year, says Van Dyk, changes were evident in the residences and the staff. “I heard staff refer to this as a family and comment on how family members worked together,” he says, noting that his staff retention also increased. Van Dyk has given numerous presentations on his implementation of the Disney philosophy.

Asked about the cost of implementing this approach, Van Dyk says it’s not as expensive as losing staff and having unhappy residents. “Retention has significant advantages, especially in the continuity of care for residents,” he explains. “The less change in staff, the happier residents are.”

Really, he says, the effort requires a commitment to change. “This in an investment in the company, not an expense for the company.”
First Assisted Living Residence to Receive Quality Award Is Honored For Outstanding Dementia Program

Quality is achieved by design, not happenstance. Having full respect for this, Lena Smith and Rusty Dobbs spent more than two years developing the building design and program structure for The Cottages of Albuquerque, a 54-unit assisted living residence serving residents with Alzheimer’s and dementia.

Their hard work and innovative approach has paid off in many ways: the smiles on residents’ faces; low staff turnover rates; a long waiting list; and, most recently, winning an AHCA/NCAL Step II Quality Award. The Cottages is the first assisted living residence to receive the award, which has been open to assisted living residences for the past two years of the award’s eight-year history.

The American Health Care Association (AHCA) and the National Center for Assisted Living (NCAL) awarded the Quality Award to 64 long term care facilities that demonstrated a strong commitment to quality improvement. The awards were given in two categories: an entry level, Step I award, and a more rigorous Step II award. Eleven facilities received the Step II award.

In the early 1990s, Smith and Dobbs saw a need for a new approach to care of moderate and late-stage dementia residents in assisted living. Both licensed long term care administrators, Smith and Dobbs used a computer-aided design system to model their “ideal living system for dementia care,” says Smith. After more than two years in design and development and with a Small Business Administration loan, the pair opened the first Cottages building with 25 units.

“We did plenty of research,” remembers Smith. “We wanted our residence to accommodate a complicated dementia population with increased hands-on care,” she explains, adding that it was filled within four months. Two years later, they opened a second 25-unit building, using virtually the same design.

Quality Based On Three Factors
Smith says three factors distinguish The Cottages: environment, staffing, and programming. Because the residence serves a specialized population, design is critical to its success. “We designed the building to accommodate the behaviors of our residents,” says Smith, noting that the building’s round structure has all walkways circulate back to where they started. The country decor includes antique furnishings and quilt hangings. “The decor helps our residents feel like they’ve been here before. For a confused resident, it has a calming effect, better than any medicine,” Smith says.

Another design goal, says Smith, was to reduce the number of residents in the space. “We limited the building to 25 residents and increased the amount of space per resident,” she says, adding that the higher ceilings and multiple dormers provide natural lighting for a long part of the day. An outdoor area offers walking paths, gazebos, and a patio. The fully secured area is surrounded with high fences that blend into the landscape.

In staffing, Smith and Dobbs planned for increased contact between the 60 staff members and residents. “We have fewer management positions and more resources in direct care,” says Smith. With fewer residents per caregiver, she says, staff “feel they can do their best work, and they are valued for it.”

In programming, Smith and Dobbs direct staff to anticipate needs rather than respond to them. Before residents are too tired, Smith says, staff encourage them to rest or do seated activities; before they get hungry, they are given snacks. “The behaviors associated with frustration, anger, and agitation are minimized because their needs are met on a continual basis,” says Smith.

Making Bath Time Fun
AHCA/NCAL Quality Award honorees at the Step II level must demonstrate how they addressed a particular aspect of care and applied strategic planning, analysis, process management, and business results. Smith knew the Cottages bathing project fit the description perfectly.

Trying to ease one of the more difficult times for residents and staff, Smith, Dobbs, and staff designed a positive bathing program. First, Smith trained all staff on why residents are uncomfortable during bathing. Then, for two weeks, staff documented all negative responses to bathing, including crying, scratching, or pained facial expressions. Then, with staff input, the environment was changed: staff raised the room temperature, added soft music, and put snacks within staff reach along with distractive items such as small balls and rubber ducks. Softer, more absorbent towels were also used.

After three months of staff education and the environmental changes, staff resurveyed bathing responses using the same tally system. “We were surprised to find a 60 percent decrease in those negative behaviors,” says Smith.

Smith says the ultimate goal in this program and other efforts is resident satisfaction. “Everything here is premised by the question of how will this help the residents be healthier and happier,” she notes. “It is part of being an organization that is driven by being the best.”
New Commission To Address Nursing Shortage In LTC Facilities

According to a recent federal report, demand for long term care workers will triple by 2050. This report, along with similar staffing studies and facility administrators’ reports of difficulty filling positions, make the outlook for the long term care workforce look bleak.

To counter these trends, the National Center for Assisted Living (NCAL) and the American Health Care Association (AHCA) announced a new national commission that will address the issue. The National Commission On Nursing Workforce For Long Term Care will include nurses, educators, workforce investment board members, seniors groups, and national experts from across the country, including NCAL Executive Director David Kyllo. The commission will be administered by George Washington University.

Chaired by Ed Howard, executive vice president of the Alliance for Health Reform, the group will, over the next year, review research on long term care workforce issues, develop innovative approaches to addressing them, facilitate a structure for providers to apply for grants to help with workforce issues, and create a commission structure that can be replicated at state and local levels.

“We are proud to help spearhead this effort to find solutions to a chronic workforce shortage that threatens care quality and places seniors at risk,” said Charles Roadman, MD, CNA, president and chief executive officer of AHCA and NCAL.

Pilot Program Helps Families Finance Assisted Living

Of the many challenges faced by families of prospective assisted living residents, Elias Papasavvas doesn’t want payment for care to be a stumbling block. How many families walk away from an assisted living facility because cash is not immediately available, he wonders.

So the concept for his company, ElderLife Financial, is simple: a loan program to help families pay for assisted living care. “Few families, even well-to-do families, have $50,000 available in cash to pay for care,” says Papasavvas, chief executive officer, who spent three years developing the company. He likens the concept to the nation’s student loan program, a way to borrow what you need to pay for care and pay it back through small monthly payments.

The Family Payment Plan, as he calls it, works like this: A family selects an assisted living community and realizes the family contribution may not be enough to cover the monthly fees. Rather than liquidate assets at an undesirable time or keep their loved one at home, the family learns about the ElderLife program from the facility marketing staff. With one phone call, up to five adult children can apply for an unsecured loan in about 15 minutes. Within two hours, a decision is made. If approved, the resident’s monthly fee is wired to the residence within three days and each month after that.

Currently, loans are made for five years at an interest rate of 9 percent. “This program spreads out the immediate impact of care payments on the family’s budget,” explains Papasavvas, who notes that ElderLife charges the provider a transaction fee of 2 percent of the monthly payment.

Facility administrators who learn about the program, says Papasavvas, are ready to sign up immediately. Currently, it is available at 33 residences in Maryland, Virginia, and New Jersey. ElderLife will expand to the Midwest within six months and is seeking to affiliate with a national bank to offer the program nationwide. Still, Papasavvas says expansion will be done carefully. “Our purpose is to promote dialogue on the concept,” he says.

Bill Sferro, vice president of marketing for Amerisist, says the program has been a great marketing tool for his assisted living residences. “The ElderLife loan program helps make our product more attainable,” he says. “It is ideal for family members spread across the country who are pooling funds for care.”

Another benefit, says Sferro, is that payments are made on time and collections are reduced. The program is offered by his sales staff at eight residences in Virginia and three in Maryland.

Don Feltman of Somerford Corp., which owns six residences in Maryland, agrees and sees great promise in the program. Feltman promotes the program through his staff who have contact with prospective residents, in articles in each community’s newsletter, and by keeping ElderLife brochures in facilities. Still, Feltman sees the need for greater public awareness.

“This program is somewhat counterintuitive to where our culture has shifted,” he explains. “The norm has become to shelter parental assets so they become indigent. ElderLife provides an opportunity to offer a better quality of life to our parents who have provided for us.”

For more information about the family loan program, visit the company’s Web site, www.elderlifefinancial.com.
Recent Sales And Acquisitions In Assisted Living

Marriott International announces the sale of its 14 remaining Brighton Gardens assisted living communities to CNL Retirement Properties for $184 million. Marriott provided a $92 million acquisition loan to CNL and received $92 million in cash in connection with the sale. Sunrise Senior Living currently operates and will continue to operate the residences under long-term management agreements.

With this transaction, Marriott has sold all real estate related to its seniors living business. Marriott, based in Washington, D.C., operates more than 2,600 lodging properties in the United States and 68 other countries and territories. CNL Retirement Properties, based in Orlando, Fla., owns 55 seniors living communities in 22 states.

In another CNL transaction, the company announced it closed on the acquisition of the Balmoral Assisted Living Community, a 99-unit seniors residence in Palm Harbor, Fla., that offers independent and assisted living units as well as Alzheimer’s care. CNL paid approximately $12.2 million for the facility to Horizon Bay Senior Communities. An affiliate of Harbor Retirement Associates will operate the property under a long-term management agreement.

Merrill Gardens acquired operating control of four assisted living residences in the Puget Sound area of Washington state. With this transaction, the Seattle-based company will own and operate 66 communities in 14 states with a total resident capacity of 7,877. The company has 2,600 employees. With a total value of $45 million, the transaction includes two communities that are currently open, one that will open in 2003, and one that will open in 2005.

Muncie, Ind.-based AmeriCare Communities has bought nine properties in three states from the Anderson, Ind.-based Church Extension of The Church of God. The acquisition adds eight assisted living residences to the seven already owned by AmeriCare and adds one skilled nursing facility to its current portfolio of 12.

The Church of God has operated most of its assisted living residences under the CrownPointe name. AmeriCare will continue using the CrownPointe name at those sites and at some of its currently owned communities. AmeriCare focuses on seniors communities in Indiana counties with a population of less than 50,000.
NCAL Successes Set The Foundation For A Bright Future

Continued from page 1

hours reviewing and proposing modifications to each of the 131 recommendations. In a two-day marathon session, the board developed NCAL’s final position on all 131 recommendations.

The hard work put into this unprecedented public policy challenge culminated in a special thanks from the committee’s ranking Democrat, Sen. John Breaux (D-La.) to NCAL for its contributions in developing the report. I am proud that NCAL received the recognition for stepping up to the plate to meet the Senate’s expectations.

More valuable to me, however, was to witness, as I entered the Senate hearing room that gray April day, the reputation NCAL had earned. From this monumental undertaking, NCAL has risen to be seen as an organization that is collaborative, sophisticated, visionary, and one that focuses on our residents’ quality of life. I watched Senate staff confer with NCAL staff, and I had the opportunity to speak with committee Chair Sen. Larry Craig (R-Idaho) about the ALW.

I also saw key leaders of numerous national organizations seek NCAL’s input on their other initiatives that affect assisted living. The value of NCAL’s partnerships and respected reputation will benefit the assisted living profession today and in the future. We have come a long way in NCAL’s short history.

As important as the ALW was, it was only part of NCAL’s activities over the past two years. Many other accomplishments deserve recognition and have contributed to NCAL’s reputation as a principle-based provider association with staff expertise and strong volunteer leadership. NCAL was a committed partner in the AHCA/NCAL Campaign to Save Long Term Care, coordinating stops at assisted living facilities on the Driving for Quality Care RV national petition tour. We worked to incorporate assisted living into the U.S. Department of Labor’s caregiver job clearinghouse and the agency’s public service announcement.

NCAL also has lobbied members of Congress on issues critical to the assisted living profession, including tort reform, the labor crisis, and Medicaid funding. We have assumed leadership roles in addressing the assisted living-related initiatives undertaken by the Occupational Safety and Health Administration and the Federal Trade Commission (FTC). I was privileged to testify on behalf of NCAL before the FTC this year on assisted living quality, costs, and advertising and marketing issues.

Other professions also seek NCAL’s expertise. The American Institute of Architects and the National Multiple Sclerosis Society asked our help in developing guidelines related to assisted living. In collaboration with other assisted living provider organizations, NCAL has responded to these requests and continues to look for avenues for the profession to speak with one voice, which benefits NCAL’s membership and the entire profession.

NCAL has raised the bar for our profession with superior educational resources and seminar offerings at the AHCA/NCAL Annual Convention and Exposition. Each year, NCAL leaders and staff design an Assisted Living Super Track that allows access to experts who teach new techniques and best practices in more than 40 seminars. In attendee evaluations, these seminars are always rated as outstanding. NCAL also produces valued professional resources, including our annual review of state regulation.

On the consumer side of the assisted living equation, we have contributed greatly to the public’s knowledge and understanding of assisted living. Through our consumer brochures and a new consumer-focused Web site, www.longtermcareliving.com, NCAL helps the public better understand assisted living and answers many of the common questions related to long term care.

I am particularly proud that we have continued to grow our annual national celebration of the assisted living profession and the residents we serve. We had no idea in 1995 when we created National Assisted Living Week® that it would become increasingly successful. This year, more than 14,000 copies of our planning guide were either mailed or downloaded from our Web site, making 2003 our most successful national celebration ever.

In closing my term, I must thank all of my fellow board officers and members, the NCAL members and state leaders, state affiliate staff and NCAL/AHCA staff, and AHCA leadership for all their support of NCAL and assisted living during my chairmanship. With your collective expertise, guidance, counsel, dedication, and genuine devotion to the advancement of NCAL and assisted living, all of our successes have been possible.

As I look to the future, I remain steadfast in my commitment to continue to fight for what is right for our residents, family members, and staff, who rely the assisted living facilities we own and operate. I also remain steadfast in my belief that we must provide the type of care and service that each of us would give for our own loved ones. If we do these things, our profession’s future will be bright and prosperous.
New Federal Efforts To Curb Medicare Fraud

The federal government has initiated new efforts aimed at stopping abuse of the power wheelchair benefit in the Medicare program.

The Centers for Medicare & Medicaid Services (CMS) will launch its nationwide campaign in Texas, where recent reports in the media and from the agency’s regional office have highlighted a growing trend of potentially improper spending on wheelchairs. Under the program, “Operation Wheeler Dealer,” CMS will aggressively review applications from companies that seek to provide power wheelchairs for Medicare beneficiaries, and claims for power wheelchairs will undergo special federal scrutiny from CMS clinicians before payment can be made. CMS’ efforts also include training of suppliers, regulatory changes, and increased physician and beneficiary awareness.

The Department of Health and Human Services Office of Inspector General is investigating the proliferation of durable medical equipment fraud cases involving inflated Medicare billings, charges for equipment not delivered, and falsification of documents to qualify beneficiaries for unnecessary equipment.

“Spending on power wheelchairs has increased nearly 450 percent over the last four years, an unprecedented growth in this benefit,” said CMS Administrator Tom Scully. “While many wheelchairs are provided by ethical suppliers and go to beneficiaries in need, we know that unscrupulous suppliers are promising free wheelchairs to beneficiaries who don’t need them.” Agency officials warned beneficiaries to be suspicious of offers for “free scooters.”

Nationally, total Medicare payments for motorized wheelchairs increased from $289 million in 1999 to more than $845 million in 2002.

NCAL Co-Sponsors National Meeting On Assisted Living

The National Center for Assisted Living (NCAL) will co-sponsor a national forum to discuss the regulatory future of assisted living. The Assisted Living Provider Leadership Summit, titled “Many Paths to Common Ground,” will be held on Dec. 4-5 in Tampa, Fla.

Hosted by the University of South Florida’s Florida Policy Exchange Center on Aging, and co-sponsored by NCAL and other national associations, the conference brings together state and national leaders to work toward establishing a shared vision for ensuring quality and consumer choice in assisted living. Presentations will address best practices in assisted living and policy and regulatory successes and failures. Conference attendees will also consider tort reform, medication management, and staffing issues. For more information, go to www.fpeca.usf.edu/alsummit.pdf.
At Brandermill Woods Retirement Community in Midlothian, Va., Kristin Hughes joined the staff as program director for assisted living. Karen Wilson, who was previously the community’s supervisor of dining services, was promoted to director of resident services. Brandermill includes 60 assisted living units, 60 skilled nursing beds, and 197 independent living units.

EPOCH Senior Living announced that Debora Pfaff has been named senior vice president and chief financial officer. The company owns, operates, and manages more than 1,700 assisted living and 750 skilled nursing units in nine states.

Classic Residence by Hyatt appointed Stephanie Fields senior vice president and general counsel. She will provide legal oversight of the company’s operations, transactions, and risk management.

Kimberly Andreadis has been named sales director for Classic Residence by Hyatt in Chevy Chase, Md. She has more than 16 years of experience in residential marketing and property management.

Leisa Melancon has been named director of community relations for Brighton Gardens Assisted Living in Virginia Beach, Va. She will be responsible for sales, marketing, and public relations at the 114-unit assisted living facility.

Masonic Homes of the Grand Lodge in Pennsylvania has announced that William Davis Jr. has been promoted to chief operating officer of health care services. Davis will oversee quality initiatives and benchmarking for assisted living at three of the organization’s four properties. Tina Raybold has been promoted to director of public relations for all Masonic Homes locations.