

March 2014

agenda™

LeadingAge California

The Nonprofit Spirit:

Rewards, Challenges
and the Evolution
of Aging Services

By Eric Dowdy



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LeadingAge California represents more than 400 nonprofit providers of senior living services – including affordable housing, continuing care retirement communities, assisted living, skilled nursing, and home and community-based care. LeadingAge California's advocacy, educational programs, communications and other resources help its members best serve the needs of more than 100,000 seniors. Founded in 1961, LeadingAge California is celebrating its 53rd year of public service.

What Makes the Nonprofit Difference

by Joanne Handy

For this issue of *Agenda*, we connected with three leaders in the field of aging services who weighed in on the role of nonprofit organizations in senior living and care and what makes nonprofits unique. Nonprofit senior living providers provide benefits that often extend far beyond the residents they serve into the surrounding community.

Putting resident welfare before the bottom line is one of the hallmarks of nonprofit organizations – whether by continuing to support a resident who unexpectedly runs out of assets, subsidizing unprofitable services, or serving low income persons. Nonprofits also provide tangible benefits through a host of outreach services open to the communities in which they are located, such as nutrition and wellness programs, volunteer opportunities for young people and community service events for all seniors.

Driven to uphold the charitable mission of the organization, the goals of individuals serving on a nonprofit board of directors, which often include residents themselves, reflect the interests of the organization they serve rather than their personal financial interests.

Hospitals are now required to prepare Community Benefit reports that clearly describe and quantify the charitable benefits they provide. Many of our members already publish similar excellent reports highlighting their organization and how they have impacted the lives of residents, staff and the general community.

Nonprofits face many hurdles – including challenges to the tax exempt status of our member organizations. Driven by a desperate search for tax revenues by states and towns, and by examples of political organizations that violated their tax exempt responsibilities, all tax exempt nonprofits are under intense scrutiny by politicians, regulators and the media.

In spite of this, our interviewees were in consensus when expressing that any challenges were far outweighed by the rewards of changing residents' lives for the better and benefitting the broader community. •••

Joanne Handy is president & CEO of LeadingAge California.



The Nonprofit Spirit:

Rewards, Challenges and the Evolution of Aging Services

By Eric Dowdy

Nonprofit organizations have a long history in American life that predates the formation of the nation. Charitable organizations that provide healthcare and services to the elderly and those without means have long been a critical part of civil society. In fact, LeadingAge California members have roots reaching back more than 100 years, such as Hollenbeck Palms in Los Angeles, which was established in 1890. Most nonprofit senior care and housing organizations emerged from a religious, fraternal or ethnic heritage and are mission-driven and dedicated to the needs of the community. With this long heritage, nonprofit providers have a unique perspective on the care for California's older adults.

The Institute for Senior Living, a statewide think-tank based in Sacramento focusing on innovations to meet the needs of the aging population, recently published a report entitled, "The Value of Non-Profit in the Senior Living Industry." The paper outlines the

contributions of nonprofits and the challenges that the lie ahead. In particular, nonprofits were identified as being "highly focused on the quality of life for seniors" as part of the organization's mission. The nonprofit at its core is oriented to resident welfare. As with for-profit organizations, "nonprofits must demonstrate strong business skills" but the nonprofit value is the reinvestment of profits back into the organization and its services.

The editors of *Agenda* recently spoke with three leaders in the senior living field to find out how not-for-profits fit into today's evolving long-term care system. LeadingAge California members have persevered and managed to thrive during historic economic downturns and a disastrous housing market. Our interviews below were aimed at capturing a glimpse of the nonprofit soul through the lens of experienced leaders in the field.

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CCRCs & Assisted Living

Assisted Living Reform Atop Legislature's Agenda

There are currently ten bills in the California State Legislature that would make significant changes to the Residential Care for the Elderly Act, some sponsored by providers and others part of reform efforts by consumer organizations. Issues were brought to the Legislature's attention through reports by PBS' Frontline and ProPublica in addition to frequent reporting by the San Diego Union Tribune. The reporting identified deficiencies in oversight by the Department of Social Services, which suffered large budget cuts during the last few budget cycles. Reports also blasted the Department for an antiquated computer system that does not allow easily accessed information for consumers.

On February 11, the Senate and Assembly Human Services Committees held a hearing, "Increasing Accountability in Assisted Living Facilities: State Oversight in Residential Care Facilities for the Elderly." After witnesses explained a RCFE social model of care, the Director of the Department of Social Services Will Lightbourne testified on the departments behalf responding to the recent criticisms.

The following are the current bills affecting assisted living:

AB 1436 (Waldron, R-Escondido) would require inspection and compliance reports be posted on the DSS website.

AB 1454 (Calderon, D-Whittier) would increase DSS Community Care Licensing Division's visit frequency from once every five years to annual inspections.

AB 1523 (Atkins, D-San Diego) would require all RCFEs to maintain liability insurance

AB 1554 (Skinner, D-Berkeley) would modify the way complaint investigations are handled.

AB 1570 (Chesbro, D-Eureka) would increase the training hour requirements for direct staff and RCFE administrators.

AB 1571 (Eggman, D-Stockton) would requires RCFE applicants to disclose compliance history if the applicant held ownership in clinics, health facilities or community care facilities. The bill would also establish a consumer information service system, require disclosure of facility specific data, additional actions taken by the department against the facility, amounts of fines imposed and collected among other things. The bill would also require the department to establish a rating system by 2019

AB 1572 (Eggman, D-Stockton) would make changes to the way resident and family councils operate in RCFEs.

SB 894 (Corbett, D-Hayward) would establishes statutory timelines and requirements related to the revocation of a license for an RCFE. Creates a new private right of action to allow resident to sue of file for injunctive relief for any violation.

SB 895 (Corbett, D-Hayward) would require the Department of Social Services to inspect RCFEs at least once every year.

SB 911 (Block, D-San Diego) would change the training hour requirement for RCFE direct care staff and administrators.

LeadingAge California will be actively involved in the development of these bills as they move through the Legislature.

Prepared by Eric Dowdy, vice president of policy and communications for LeadingAge California. Dowdy can be reached at edowdy@aging.org or 916-469-3376.

Housing

California Homes and Jobs Act (SB 391): Creating a Permanent Funding Source for Affordable Housing

Over the past three years, federal and state funding for the development of affordable homes has dried up. Last year alone, California lost more than \$1 billion in state and federal development funding. With the number of Californians age 85 and older expected to more than double by 2030, the situation will only get worse without a funding source for new development.

One of LeadingAge California's top priorities, the California Homes and Jobs Act (SB 391), aims to meet this need by creating a permanent, ongoing source of funding.



Specifically, through enacting a small recordation fee of \$75 on real estate transactions (excluding home sales), the California Homes and Jobs Act will generate an estimated \$500 million in funding for affordable housing development and housing programs without creating new debt and allow California to leverage an additional \$2.78 billion in federal and local funding and bank loans annually.

Without the California Homes and Jobs Act, tens of thousands of Californians, including seniors, will be left without an affordable place to call home. Please visit the LeadingAge California [website](#) for more information on how you can support the California Homes and Jobs Act.

PILOTs: Undermining the Development of Affordable Housing in California

California law allows nonprofit developers of affordable housing an exemption from property taxation on the theory that the savings would be put to use furthering the goals of low-income housing, requiring certification that the funds necessary to pay property taxes are, in fact, being used to maintain the affordability of units occupied by low-income households.

An issue arises when local governments require a nonprofit affordable housing developer to make Payments in Lieu of Taxes (PILOTs). California law is silent on local governments' authority to require PILOTs from the otherwise tax-exempt nonprofit developers. Because of this, some county assessors take the position that the payment

of any PILOTs disqualifies the developer's certification that the property tax savings are being used to maintain unit affordability. Once the certification is disqualified, the assessor can bill the nonprofit for all past due property taxes, generating more county revenue.

PILOTs present a serious threat to developing critically needed additional affordable housing units in California. LeadingAge California is committed to working with the State Legislature to outline and implement a favorable solution to the issue for developers of affordable housing.

Community-Based Services

Restoration of PACE Medi-Cal Rate Reductions

Proposed changes to Medi-Cal capitation rates paid to PACE organizations (Program of All-inclusive Care for the Elderly) would partially restore reductions spurred by budget pressures in 2012 and 2013 that led to modifications of how payments to PACE organizations were determined.

PACE organizations must provide all Medicare and Medicaid covered benefits and services, as well as any other services necessary to maintain and improve a patient's health. Current law requires the Department of Health Care Services to establish capitation

rates paid to each PACE organization at no less than 90 percent of the fee-for-service equivalent.

Reductions in payments to PACE organizations have significantly impacted their ability to expand to serve the frail elderly population.

The proposed changes would set those payments at no lower than 95 percent and direct DHCS to make further payment adjustments in counties with low utilization of services.

Prepared by Robin Douglas, communications specialist for LeadingAge California. Douglas can be reached at rdouglas@aging.org or 916-469-3385.

Grassroots



Tools for Engaging your Elected Officials

An important component of the 2014 Policy & Leadership Summit is the Lobby Day event held Wednesday, March 5. Elected officials are motivated by the people who vote for them, and these meetings allow us to introduce ourselves, identify our legislative priorities, and ensure our collective

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voices are heard loudly to influence the legislature to act on our behalf. Once you have met, legislators are more likely to pay attention to your letters and calls during legislative campaigns in the future.

Talking points and materials will be provided, though equally impactful are the personal experiences you share to help officials better understand the needs of your communities. Representatives will use your real-life examples during debates, hearings and briefings to illustrate the potential impacts legislative and regulatory attempts may have on the aging population.

To be most effective with your message and ensure successful visits, please refer to the following tips:

Before Visit

Review the “2014 Issue Briefs” provided by LeadingAge California, and consider sharing examples of successes, as well as community needs to illustrate the importance of your work.

Skilled Nursing

The Future of the QAF

Skilled Nursing Facilities (SNFs) in California have been enduring the Long-Term Care Quality Assurance Fee (aka: tax) for nearly ten years and Intermediate Care Facilities (ICFs) for even longer. In the meantime, the fiscal resources of the state collapsed so that the promise of adequate SNF Medi-Cal rates never materialized. Yet, the cost of the QAF to providers increases each year. According to the Department of Finance, the average annual SNF QAF revenue is \$439,445,000 and the average growth rate is 7.04 percent each year.

Both the ICF and SNF quality assurance fees were urged on the legislature by for-profit providers. The revenue generated from the fee is used to draw down a dollar-for-dollar federal match, offset Medi-Cal LTC rate reimbursement payments and fund LTC Medi-Cal reimbursement rate increases. Improving LTC reimbursements was immediately undercut as QAF revenues were re-directed to pay for the Older Americans Act LTC Ombudsmen Program and hundreds of staff positions at the Department of Health Care Services.

The DHCS is pursuing a multi-faceted strategy to move all Medi-Cal beneficiaries into Medi-Cal Managed Care Plans, including beneficiaries

During Visit

- Be prompt, flexible, and patient. Legislators’ schedules are very tight and frequently interrupted.
- Address your legislator properly, as “Assemblyman/woman,” and if the Member is unavailable, welcome a meeting with staff. They are often familiar with the issue and provide invaluable access.
- Be brief and to the point.
- Don’t become angry or make threats if you disagree, and don’t exaggerate the truth.

Follow-up

Thank your legislator and/or staff for their time. You will find blank cards and writing tips in the Capitol Visit packet and at the “Home Base” room at the Capitol.

Prepared by Susan Holt, Policy & Grassroots Coordinator for LeadingAge California. Holt can be reached at sholt@aging.org or 916-469-3383.

receiving skilled nursing services. This strategy is called the “Coordinated Care Initiative” and it targets persons eligible for both Medicare and Medi-Cal to receive all long-term care services and supports through Medi-Cal Managed Care.

Medi-Cal skilled nursing reimbursement rates are currently set by the DHCS under AB 1629 (2004). The authority to collect the SNF QAF expires in 2015 requiring that it be extended this year or the state will lose SNF QAF revenues in 2015. How much longer will SNF providers pay the QAF as the state moves to reduce skilled nursing facilities’ Medi-Cal census in favor of home and community-based services? Will SNF providers continue to pay a quality assurance fee that is disconnected from reimbursement?

Providers’ most important leverage to influence the future of the SNF QAF will occur with the extension of the SNF QAF sunset date later this year. It will probably come up in the small print of a budget trailer bill and LeadingAge California will alert members to this development when it occurs. •••

Prepared by Jack Christy, senior policy advisor for LeadingAge California. Christy can be reached at jchristy@aging.org or 916-469-3366.



'Dr. Sam' Can't be Stopped

After 50 years as a cardiothoracic and vascular surgeon in Fresno, Calif., Dr. Sathaporn Vathayanon is used to bumping into a former patient or a patient's relative.

"I'll see people on the street and they'll say, 'You operated on my father-in-law and now he's the picture of health,'" says Vathayanon, known as "Dr. Sam" to his neighbors at The Terraces at San Joaquin Gardens. "It's rewarding that people still remember me and what I did for them."

After arriving in Fresno from the teaching staff of the University of Michigan, Vathayanon

performed central California's first coronary bypass operation in 1970.

He went on to publish 25 articles in medical journals and helped Valley Children's Hospital—now Children's Hospital Central California—add centers to perform cardiac surgery on teens and adults.

Now 80, his challenges lie closer to home. At 78 Vathayanon was diagnosed with Parkinson's disease, a degenerative condition that affects the central nervous system.

In spite of that, he's slowed down very little.

"It does not set me back too much at all. I keep a full schedule

almost every day, even though I have some handicaps on my mobility," he says. "I still use the phone and Internet to keep up with my network of friends throughout the world and U.S. I reach out to them on a regular basis."

Many of those friendships were formed during the latter 20 years of his career, when he traveled to less-developed countries to share his medical knowledge and skills with local doctors and hospitals.

Until 2004, he had never used his skills in a disaster zone. But 12 days after the devastating Indonesian tsunami, Vathayanon traveled to the Thai resort island of Phuket, helping locals desperately in need of medical care.

There he saw between 28 and 74 patients a day for two-and-a-half weeks. He considers his service in Phuket divinely appointed.

"It was quite an experience," says Vathayanon, who was raised in the Catholic schools of Bangkok before coming to the United States in 1959. He has maintained his strong Christian faith ever since.

"I felt that I had been called by God to be there so I could devote my energy and knowledge to helping the victims," he says. "I feel that I received more in my heart and soul than I contributed in helping them."

Front Porch Launches Humanly Possible(SM)

In today's aging society, organizations must evolve to successfully meet the world's dramatically emerging needs. Front Porch, a not-for-profit 'human serving' organization featuring innovative communities and programs that meet the changing needs of individuals as they age, today announced Humanly Possible(SM), its groundbreaking new strategic approach to "innovation with a cause" and greater collaboration.

Front Porch's central mission is about meeting needs with excellence and Humanly Possible underscores a culture aimed at doing everything humanly possible to creatively meet emerging needs now and in the future. This bold and transformative commitment is an authentic expression of Front Porch's passion to create new opportunities and forge new directions. It will become an organization-wide focus for disruptive innovation, strategic development and partnership.

"We're facing a sea change around us," said Kari Olson, chief innovation and technology officer for Front Porch and president of the Front Porch Center for Innovation and Wellbeing. "We see changes in marketplaces, competition and regulations; these come together to create an imperative for us to transform and embrace possibilities through innovation. We are truly dedicated to investing the time, energy and resources to help Front Porch address this cultural

tipping point. Through Humanly Possible, we will enhance the organization's capacity to identify, understand and deliver solutions for meeting unarticulated, emerging and future needs."

The world's aging society (as proportions of people 60 and older are rapidly outnumbering those 15 and younger) presents real-world challenges that can't be ignored. Dynamic disruptive forces are weighing in from all directions and these issues will impact people of all ages. Front Porch is ready to embrace these challenges.

"Humanly Possible is a crucible where the right chemistry of the creative spirit of people is blended with the compelling needs of the aging to achieve transformational results," said Larry Minnix, president and CEO of LeadingAge, a national association of not-for-profit organizations dedicated to making America a better place to grow old. "Humanly Possible gives us hope for the future of our field, the people we serve and work with, and the communities in which we live."

Humanly Possible is a rallying call for Front Porch to build upon its legacy, and significantly expand its work collaborating and forming innovative partnerships with other non-profits, for-profits and academia in the larger community to advance and develop new approaches, methodologies and technology applications that go beyond the traditional walls of Front Porch communities to meet community-determined needs for people of all ages.

"As a not-for-profit 'human

serving' organization going new places, Front Porch must continue to innovate so we can help others thrive," said Front Porch CEO Gary Wheeler. "At Front Porch, we see the potential of human possibility every day with the remarkable people we are honored to serve, and through the compassion and resourcefulness of our team members. We see the shifts that define how people want to live their lives. So while we have celebrated many great accomplishments, we can't sit still. Humanly Possible is about every mind, every discipline and every level of our organization working together on what's possible, what's achievable and what's next."

Front Porch created its award-winning Front Porch Center for Innovation and Wellbeing (CIW) which works with a variety of partners to find new models of care and service for underserved members of the community. For example, the Model eHealth Community for Aging (MeHCA) project (formed by the CIW) uses broadband-enabled technology to support needs and improve access to care for low-income older adults at affordable housing communities, community health clinics and other anchor institutions in Los Angeles' Koreatown neighborhood.

As a lead-up to the Humanly Possible kick-off, Front Porch enrolled select members of its leadership team in the groundbreaking Innovator's Accelerator program in October 2013, becoming the first non-profit to do so. Joining a prestigious group of top Fortune 500

companies whose employees have participated, Front Porch leaders took part in the executive training course with 70 additional staff members enrolling in the program throughout 2014.

In support of Humanly Possible, Front Porch is investing system-wide in its team members, business processes and strategy through educational programs, executive training and peer-to-peer training focused around innovation. Team members will be encouraged to be creative with the support and tools necessary to initiate innovation to improve the lives of those they currently serve, and to create opportunities for the future.

A process to identify needs, generate ideas, evaluate, support and potentially scale those ideas is in place. All ideas, successful or not, will be celebrated. This approach empowers Front Porch to creatively meet needs to help the organization grow, become more efficient, and sustain its leadership position.

Since Front Porch was established in 1999, it has received numerous accolades and national awards for innovation in meeting the needs of older adults. The non-profit has also extended its care and service to those outside the older adult community through its work in areas such as affordable housing, memory care, technology, art and community outreach, and management services. Originally formed from three experienced non-profits coming together as one, Front Porch has its roots in partnership and innovation, helping other non-profits succeed as well as partnering with the private sector to incubate technology solutions to help people live well.

About Front Porch

Founded in 1999, Front Porch is a not-for-profit support system for a family of companies that serve individuals and families through full-service retirement, active adult communities, affordable housing communities through CARING Housing Ministries and related management and development services.

Front Porch represents a leading-edge approach to wellness in aging. Comprised of 11 full-service retirement communities in California and two adult living communities in Louisiana and Florida, Front Porch also serves individuals and families through

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The Nonprofit Spirit:

Rewards, Challenges and the Evolution of Aging Services

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Kay Kallander is Senior Vice President of Strategic Planning at American Baptist Homes

of the West. Kallander currently serves as chair of the LeadingAge California Board of Directors and has more than 30 years of experience in healthcare issues.



Roberta Jacobsen is the President of Front Porch Communities and Services where she

has served various management and consulting roles since 1978. Jacobsen was recently elected to serve on the Board of Directors of LeadingAge national in Washington, DC.



Mary Stompe is Executive Director of PEP Housing and chair of LeadingAge California's

Housing Subcommittee. She is a former Petaluma City Council member and has a long history of involvement on numerous board and committees in Marin and Sonoma counties.

As a nonprofit organization, what differences do you see in the way your organization approaches its work compared to your for-profit counterparts?

Kallander: When caring for seniors in our communities, there are many choices to be made on a daily basis. As a not-for-profit, your goal is to empower local team members/staff to make the choices that they would for their own family member. It is not “how little you can do” but rather, “What could make this person happy right now?” It is what makes the difference.

Jacobsen: We always put the resident is the center of all decision making, not the shareholders. We reinvest excess revenues over expenses back into our communities, rather than having to distribute them to stockholders.

Stompe: I think the primary difference is we are mission-driven, not profit motivated. We still have to run our nonprofit organizations like a business (or we won't survive) but we do it with passion and heart.

What can nonprofits learn from the for-profit organizations?

Kallander: Measurement and tracking are critical skills that not-for-profits can learn from for-profits. Decisions then can be made in a way to ensure the integrity and stability of the organization. Too often, I have

seen organizations that did not tend to these important disciplines and many of them are gone.

Stompe: Business practices. Many nonprofits fail because they are so committed to their cause that they forget or don't want to deal with the business component of their nonprofit. Just because they do good things in the world doesn't mean that they can slide on the business side.

What are the major obstacles facing nonprofits in the short and long term?

Kallander: I believe the challenge of protecting the 501(c)(3) is both a short and long-term concern. When local, state and national budgets are strained, it is common to look to the organizations not paying taxes. It is imperative for not-for-profits to evidence their value to society. It is also important for those making decisions about living in retirement communities to know the difference.

The future senior is going to be very different than today's. Their expectations are high and their finances may not be able to support them. Also, there will be a challenge as people have choices to remain at home with the use of technology. We must be creative and imaginative as we plan for the future of senior services.

Jacobsen: Many not-for-profits have older/aging communities which require significant capital

upgrades to compete in today's market. Access to capital for new construction, project development, innovations and new programs or even expansion is a challenge. For-profits have easy access to private investors, syndicates and Wall Street.

Stompe: Lack of earning capability, expenses that outpace revenue, loss of Federal, State and local funding. Too much demand for little inventory.

What are some of the things your organization is doing to stimulate innovations in the field?

Kallander: We have created ABHOW Advantage, a culture change program which focuses on hospitality while also providing traditional services. It is a multi-year program. Every employee/team member throughout the organization receives initial and ongoing training.

Jacobsen: Our Center for Innovation and Well Being has launched a new innovation initiative called 'Humanly Possible.' This is a statement of our commitment to create new opportunities and new directions for innovation, strategic development and partnerships. Front Porch is investing in its staff, business processes and strategies around innovation to improve the lives of those we currently serve and to create opportunities for the future.

Stompe: We strive to be a leader in affordable senior housing through using new technology, the newest green building techniques available, new financing models,

etc. We know that doing the same old thing isn't going to work or meet the needs of the clients that we serve. We volunteer for pilot projects and ask our residents what we could be doing better (both in operations and in building).

Can you share any success stories about a resident impacted by one of your organization's programs?

Kallander: Frankly there are too many. As part of the ABHOW Advantage, we have a program called AB-WOW. Every Friday, throughout the organization stories are shared about residents which are exciting, dramatic and powerful. (You can always go on ABHOW.com and under NEWS see ABHOW Words. It is FULL of great stories).

Jacobsen: Our new 'Safe Return to Home' program operates out of Fredericka Care Center, where an LVN staff member has now become our 'Transitional Care Coordinator' to follow patients in their home after they are discharged. Our In-Home assessment tool helps identify the resident's social, physical, and environmental needs in their home. Examples of success stories here include helping with the placement of a Home Care attendant for a resident living alone (whose family on the East Coast); and providing nutrition consultation (or referral to Meals on Wheels) to ensure that they have adequate nutrition at home.

Stompe: 'Florence' was already in her 80s when she moved into one of our HUD-subsidized communities. Having raised

three children as a single parent, she had just retired from many years of self-employment as a seamstress and could no longer afford to pay the increasing rent on her home with just her meager monthly Social Security income. Our Professional Service Coordinators helped her get discounts on her utilities, assistance with her food costs and training on using public transit. In the last few years she has become more frail and forgetful so we are maintaining close contact with her daughters.

What do you personally find most rewarding about working in this field?

Kallander: I find the long-term relationships are most meaningful. Working with employees for decades gives the opportunity to see growth and professional development which one would not see if the turnover was rapid. Also, developing relationships with residents and their families can span decades and generations. I love being part of a person's individual journey.

Stompe: I have had a lot of careers over my lifetime but this is the most rewarding career I have ever worked at. For me, providing a basic human need (shelter) and doing as much more as I can with limited resources to turn that apartment into a home is what gets me up in the morning. The seniors we serve are so grateful for something so many people take for granted. It is extremely gratifying to make such a difference in people's lives, especially during the later years of someone's life. •••



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Membership Matters

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more than 20 affordable housing communities managed by Front Porch’s affiliate, CARING Housing Ministries. More information is available at www.frontporch.net.

Region Roundup

The Delta Region held its first 2014 region event last month at Asian Community Center’s Greenhaven Terrace community in Sacramento, California. The Delta Region Committee organized their region event to be a half-day symposium centered around the theme, “Mission and the Not-For-Profit Responsibility.”

Not-for-profits fill a gap between the corporate sector and the government and often take on jobs that would otherwise have to be taken by the government to fix the social welfare problems. A nonprofit organization can be more agile and address issues on a local level much more capably than a large bureaucracy like the government. Therefore, it is crucial for long-term care not-for-profits to maximize all of their resources to deliver as fully on their missions as possible. Not-for-profits have a responsibility to look beyond the present into the future and then stretch to make the changes they need to drive their organization forward. This is exactly what prompted the Delta Region Committee to organize such an event for their fellow nonprofit colleagues and friends.

In this education program, LeadingAge California members heard from three different speakers on what not-for-profit long-term care organizations need to know in regards to leadership development, organizational mission and philanthropy. Guest speakers included: Lori Peterson from Collaborative Consulting who spoke on Leadership Development; Teri Conklin from Seniority who presented on organizational mission and Karen Davenport from Davenport & Barr Inc. who gave a virtual presentation on philanthropy.

Attendees were engaged and learned the value and necessity of creating an engaged workforce of cultivated leaders in order to become motivated to work for a mission-driven aging services organization. They also discovered how to create



and implement programs that enhance community development and discover how to build relationships with the outside community through philanthropy and fundraising.

LeadingAge California and the Delta Region Committee thank the Asian Community Center for hosting such a successful event! Region presentations

can now be accessed by members on the [2014 Region Meetings](#) page on our website. • • •

Prepared by Megan Maddox, Member Engagement Manager for LeadingAge California. Maddox can be reached at 916-469-3365 or mmaddox@aging.org.



Sync in Seattle: Transforming the Aging Experience

AgeTech West Conference heads to Seattle for 2014 Conference & Tech Expo

On the heels of a successful 2013 conference, more aptly described as a “happening” and “catalyst for change” in San Jose, California, AgeTech will head north to hold its 2014 event in trendy downtown Seattle, Washington.

This year we will explore how technology can better synchronize aging services with consumer desires to transform the aging “user experience” for older adults and aging service providers alike. Older adults will be directly involved in providing feedback and experiences on what they find appealing and empowering about various technologies, and what isn’t through interactive forums and “sync-ups.” Aging service providers will also give accounts of their experience in piloting new technologies to better meet older adult needs and desires.

Keynotes will be on tap from the likes of Seattle-based giants Amazon and Microsoft, addressing the bigger picture of how innovation and technology will continue to revolutionize services by better responding to consumer preferences, with a focus on older adults. Planning is also underway to offer new pilot project opportunities for aging service providers who are ready to step up and get started by piloting exciting new technologies.

The conference will offer first-class amenities for networking with colleagues and technology innovators at the sleek, modern [Hyatt Olive 8 hotel](#) at a bargain rate of \$149/night. Take advantage of the downtown Seattle nightlife for your own strategic “sync-ups” with colleagues and potential partners. Seattle’s “[LINK](#)” light rail from the airport is only \$2.75 and lands you three blocks from the hotel.

Beginning on the afternoon of Monday, November 17, the conference will feature a networking reception that night and will conclude by 3pm on Tuesday, November 18. Plan to arrive on Friday or Saturday before the conference and enjoy a weekend in Seattle at the group rate (*subject to room availability*).

The bottom line is that norms have changed; technology innovation offers real opportunities for better, more person-centered and efficient care and services for older adults. Service providers, payers and policymakers need to think differently about how care is provided, innovate work-processes and modify programs to take advantage of what technology has to offer in leveraging staff and improving service to sync with consumer needs and desires. Let’s not be caught flat-footed and be displaced by others who do a better job of appealing to aging consumers – let’s be our own disrupters.

Connect with AgeTech and stay up-to-date on conference developments at www.agetechwest.org and by following us on Twitter at [#syncinseattle](#), [Facebook](#), and [subscribing to our blog](#).

ABOUT AGETECH WEST

AgeTech West is a collaborative founded by LeadingAge California, LeadingAge Oregon and LeadingAge Washington to advance the delivery of tech-enabled aging services toward a new standard of care.

Prepared by Scott Peifer, Executive Director AgeTech West. Peifer can be reached at speifer@aging.org.

2014 Annual Conference & Exposition

May 5-7, 2014

Renaissance Palm Springs Hotel
and Palm Springs Convention Center

[Re]Defining Age

There's no 'one size fits all' approach to aging. Just ask the wave of baby boomers who are redefining every aspect of the process. The 2014 LeadingAge California Annual Conference & Exhibition will explore how individuals in concert with shifting perspectives, norms and technologies are [RE] Defining Age in California and recognize LeadingAge California members at the forefront of this sea of change.

This year's conference will kick off Monday afternoon with Gregg Ledermann, President, Brand Integrity, The Experience Management Company where he will tap into his vast experience of helping many "best companies to work for" to share his proved principles for defining the work culture and customer experience, reminding the workforce to live the brand daily, and - most importantly - quantifying the experience and holding the workforce accountable for financial results.

Pundits and Predictions returns again to engage you in a lively and provocative discussion about emerging trends in senior living and services. Joanne Handy, President & CEO, LeadingAge California will moderate a panel of experts.

The Conference will close with Caroline Fisher, President, Fisher

Consulting Group, who will talk about your organization's culture and using culture as a vehicle for performance, resilience, and health throughout the organization's life cycle.

In between these informative keynote sessions there are over 55 education session to choose from. Arrive early and maximize your educational experience with one of three Pre-Conference Workshops.

Join Bill Pomeranz, Managing Director and Kathy Kirchoff, Senior Vice President, Cain Brothers, Mary Miller, CFO, Front Porch and Mary Schoegg, CFO, Pacific Retirement Services as they look at a variety of funding sources through a combination of panel discussions, case studies and interactive discussion with participants.

Dr. Cordula Dick-Muehlke will talk about recognizing and responding to various different behavioral expressions of people living in long-term care settings. Participate in hands-on learning experiences addressing the triggers of various behaviors, interventions for them, and ways to work with older adults with varying mental abilities.

"As the purse is emptied, the heart is filled." Join William McMorran, Senior Partner, Green Oak Consulting Group, Andrea Schulte,

Planned Giving Advisor, ABHOW Foundation and Kim Rhinehelder, CFRE, President, Eskaton Foundation in learning how to create a culture of philanthropy in your organization. Thoughtful discussion about employee, board, and your own personal giving will be the highlight of the session.

Stay connected and updated on all the conference activities by checking out the LeadingAge California [website](#), [Facebook](#) and [Twitter](#). Contact Jan Guiliano at 916-469-3367 or jguilian@aging.org with questions.

2014 LeadingAge California Awards

LeadingAge California proudly announces the recipients of the 2013 awards. These individuals have distinguished themselves through exemplary services, commitment and caring. This year's recipients will be honored during the LeadingAge California Annual Conference, May 6-8, 2013 in Monterey.

- **Outstanding Mentor Award:** *Lauren Moulton-Beaudry, Director of Ethics and Education, Front Porch*
- **Trustee of the Year Awardees:** *Judy Vallas, Board Chair, Navigage and Peggy Robbins, Past Board Chair, Navigage*
- **Resident of the Year Award:** *Lyle Farrow, Resident, Saratoga Retirement Community*
- **Service Award:** *Mary Anna Colwell, Resident, St. Paul's Towers*
- **Associate Member of the Year Award:** *Jennifer Sternsheim, Attorney, Sanders, Collins & Rehaste, LLC*

These individuals enhance our collective reputation through their involvement, innovation, leadership or advocacy, and generously devote time and resources to LeadingAge California and the senior services community.

Dates to Remember

Save the Date

2014 LeadingAge California Annual Conference and Exposition – May 5-7, 2014, Renaissance Palm Springs Hotel and Conference Center, Palm Springs, CA

AgeTech West “Sync in Seattle: Transforming the Aging Experience” – November 17-18, 2014, Seattle, Washington

MDS 2.0 RUG Audio Series – For dates and to register visit the LeadingAge California website

Web Seminars

For more information and to register, visit the LeadingAge California [website](#).

Care2Learn – Online courses that help care professionals build leadership skills and meet licensing requirements.

Region Meetings

LA Valleys Region – March 20, 2014

11:30 a.m.–1:30 p.m.

Topic: New Directions & Trends in Dementia Care

Speaker: Dr. Cordula Dick-Muehlke

Location: Atherton Baptist Homes – Alhambra, CA

Santa Rey Region – March 21, 2014

12:30–2:30 p.m.

Topic: Leading Change and Innovation: A Close Look at Solar Energy in Affordable Housing

Speaker: Travis Hanna, Jennifer Frew

Location: Pacific Meadows – Carmel, CA

Southern California Regions – April 4, 2014

Noon–2:00 p.m.

Topic: Public Policy Challenges in 2014

Speaker: Eric Dowdy

Location: TBA

Central California Regions – April 10, 2014

Noon–2:00 p.m.

Topic: Public Policy Challenges in 2014

Speaker: Eric Dowdy

Location: Casa Dorinda – Santa Barbara, CA

Northern California Regions – April 11, 2014

Noon–2:00 p.m.

Topic: Public Policy Challenges in 2014

Speaker: Eric Dowdy

Location: TBA

Delta Region – April 23, 2014

9:00 a.m.–1:00 p.m.

Topic: Financial Strategies for Your Organization

Speaker: Frank Rockwood

Location: Covenant Village of Turlock





PURCHASING IS EASY!

Courtney Weidmann

California Value First Representative

LeadingAge California

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