



ASSISTED LIVING

MANAGEMENT

Report

Benchmarks, best practices, marketing strategies and management tools for assisted living profitability & growth

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Dear Subscriber,

Do you know how to build and leverage relationships with members of the local media? Your April issue is brimming with proven tactics that are working for AL companies of all sizes – from small Mom-and-Pops to one of the largest providers in the nation, p. 1.

And cleanliness may be next to godliness, but it's also one of the top areas that physicians and their office staff consider when deciding whether to refer patients to your residence. Learn more about what turns them on – and off, p. 6.

Finally, this month's Expert Advisor column features Part II of a legal series on how to determine when you must pay overtime wages – and how to limit your damages if you get it wrong, p. 8.

Happy Spring and happy reading!

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Proactive strategies to counteract negative press...

How to use the press and PR to stand apart from poor providers

Prepare now to be faced with a barrage of questions from reporters and the public. The potential for a public relations disaster looms, if the recent experiences of national and regional AL providers is any indication.

From national headlines about insider-trading allegations in the upper echelons of Sunrise Senior Living to a four-part special report on negligent AL providers in Pennsylvania, a recent spate of negative press about assisted living has industry leaders and owners working hard to distinguish the professional, compassionate AL providers from less scrupulous companies.

Case in point: the industry's largest national organization was quick to write a letter to the editor after the *Philadelphia Inquirer* exposed shocking incidents of neglect and mistreatment at some AL communities licensed by the state.

Richard Grimes, president of the Assisted Living Federation of America, emphasized in his Feb. 28 letter that the majority of AL providers are "professionally managed" communities that screen employees, provide training and use internal checks and balances "to ensure residents receive the highest quality care and service.

“Indeed, the requirements of assisted living companies typically exceed minimum state requirements,” he wrote. Savvy AL operators already have built-in ways to communicate this important distinction to local reporters and consumers. Increasingly, you’ll need to do the same.

As the \$30 billion assisted living industry continues to grow, expect a corresponding jump in the number of news stories about the “bad apples” of the industry who put profits before people, your colleagues warn.

Encourage consumers to see for themselves

When negative stories about the industry make national or local headlines, one of the best ways to rise above the fray and stand out as an exceptional residence may seem counter intuitive: Encourage callers to shop your competitors.

Sound crazy? It works for Jamie Glavich, owner and operator of Almost Home Senior Service, a 14-bed residence in Sarasota, Fla.

Glavich encourages potential residents to tour her competitors unannounced – and to do so more than once, including at different times of the day and at least

once during a weekend and a week day, she says.

She also gives them a list of attributes to scrutinize while shopping around, such as the company’s elopement policy, emergency evacuation plan, staffing ratios and number of activities.

Teresa Shook goes one step further. She urges callers to view her company’s profile on the state’s Department of Aging and Disability Services Website, which lists recent survey deficiencies of all state licensed assisted living residences [<http://facilityquality.dhs.state.tx.us>].

“It gives them a report card,” says Shook, president and owner of Courtyards at Lake Granbury (Texas).

Consumers who look up her 112-bed residence on the state’s Website will see that Shook didn’t receive any citations during her most recent survey February 1, nor during the past 12 months.

They’ll also learn that state surveyors cited her competitor for two deficiencies in October – for failing to keep the building free of “dirt, rubbish, dust and hazards” and for not following “sanitary dishwashing procedures,” according to a report on the state’s Website.

“The more you push people to find out more about



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you, the more comfortable people will feel about your [residence],” Shook says. “A good [provider] will always want you to call the state and check on their record.”

Flaunt your best practices

Assisted living owners in Florida still feel the sting from a lengthy article that ran in *USA Today* three years ago, when the national newspaper reported on deaths that resulted from safety lapses and staff shortages within some assisted living communities, recalls Patricia Lange, executive director of the Florida Assisted Living Affiliation (FALA).

FALA members went on the offensive, launching a grassroots campaign to help consumers learn what to look for when considering assisted living as an option, says Lange, whose Tallahassee-based organization has 500 members.

“One bad story hurts all of us,” she says. That’s why Lange encourages AL operators “to rise to a higher level of standard” and to let the community know about it.

For example, although Florida doesn’t require

assisted living providers to offer immunization programs for influenza or pneumonia, most encourage and implement some type of program to get as many residents immunized as possible, Lange says.

This “higher standard” also means going beyond state requirements for screening, training and supervising employees, she says.

“If you have solid policies in place, you can counteract any negative comments about the industry by pointing out what you do and how you do it better,” Lange says.

Get to know local reporters

Establishing a friendly relationship with local reporters can help you get stories placed in the newspaper that will generate great publicity – and can come in handy if an unfortunate incident ever occurs at your residence, says Anthony Cirillo, a Huntersville, N.C.-based marketing consultant who specializes in assisted living.

But take note: There’s more to “media relations” than simply sending a press release to the local newspaper, he says.

Use these road-tested strategies to identify ‘foibles’ that could turn tragic

“Risk management, in a nutshell, means looking at yourself with the critical eye of a consumer or attorney so you can catch your own foibles before something bad happens,” says Sandi Petersen, a risk management consultant with Senior Risk Solutions, in Rowlett, Texas. [For more on risk management, see Petersen’s risk management worksheet in the Tool of the Month, p. 10.]

At a minimum, she says, your risk management processes should address these four key areas:

- **Don’t over-promise:** Nothing will tarnish your reputation faster than a marketing message that raises a consumer’s expectations to a level that’s higher than you can deliver, she says. “Your bad name starts when you over-promise,” Petersen says. “Be very clear up front with consumers on what you can and can’t do. You can’t keep Mom from falling and you can’t keep her from wandering if you don’t have a lock on the door,” she says.
- **Conduct careful initial assessments:** Guard against admitting new residents who aren’t suitable for your community, Petersen says. “People are older and sicker by the time they come into assisted living, so we have to be more savvy about the risks,” such as falls, skin breakdowns and wandering, she says. Petersen recalls an AL owner who was sued after a resident with dementia wandered away and was hit by a car and seriously injured. “The assisted living staff should have better assessed the resident,” Petersen says. “A good assessment tool would have picked up on her personal care needs and shown that she wasn’t suitable for that facility.”
- **Reassess residents at regular intervals:** Formally reassess each resident’s needs and condition at least as often as your state regulations require. Petersen recommends that her clients do so every three months or more often, if a significant change in condition occurs [see *Assisted Living Management Report*, 1/07].
- **Communicate with family members at least every three months:** The best time to do so is directly following your quarterly reassessment, Petersen says. “Sometimes a source of litigation is when a family feels that the facility didn’t tell them what was going on with Mom,” she says. “And then when something happens, the family says, ‘Well I had no idea!’ That’s why AL owner Teresa Shook calls a family conference for each resident every 90 days. If family members can’t come in for a face-to-face meeting, she “meets” with them via conference call. “It gives everybody the opportunity to put something out on the table,” Shook says. ♦

It should include inviting local reporters to tour your building, attend your functions and meet you for lunch at your residence “even when there’s nothing going on,” says Cirillo, the former marketing director of two hospitals.

“Build those relationships now so that if a negative story does break, you’ll have that foundation with readers and reporters built ahead of time,” he says.

These benefits aren’t lost on one of the largest assisted living providers in the U.S.

Marie Rains, national marketing director for Atria Senior Living Group, says her company requires all building executive directors to introduce themselves to local reporters.

“We actively want our executive directors to meet the press and invite them to events,” she says.

Shook also is a firm believer in networking with the press. Just a few months ago, a local newspaper ran a short article about a Valentine’s Day dance Shook held at her residence, complete with the crowning of a king and queen.

“The public reads all of these good things about us, so if something [bad] ever happens, at least they’ve seen us in a positive light year after year,” Shook says.

3 more ways to propagate your professionalism

✓ Establish an outside advisory committee:

Although this concept is more popular among skilled nursing facilities, it’s a great way to expand your network and demonstrate your commitment to resident care – especially if your advisory committee includes local seniors who have influence in the community, says Cirillo. “An advisory committee can help you market your residence to the community and get your message out,” he says.

✓ **Launch a blog or podcast from your Website:** “Hospital CEOs have blogs. Why not assisted living administrators? Posting your thoughts, experiences or happenings on a daily or weekly web diary is a great way to demonstrate the emotional experience of your residence,” says Cirillo.

True, seniors aren’t as tech-savvy as their adult children, but nearly a third (31%) of those aged 65 and older go online, and more than two-thirds (70%) of those between ages 50-64 are surfing the ‘net, according to a 2005 survey by the Henry J. Kaiser Family Foundation.

“More than ever, Baby Boomers are web savvy,” Cirillo says. “I’m a trailing-edge boomer; I use an iPod. My 80-year-old father uses a computer.”

Even the Centers for Medicare & Medicaid Services is riding the iPod wave. Last year, CMS

uploaded eight podcasts on its beneficiary Website to communicate information about the Medicare prescription drug benefit and Medicare premiums. An average of 250 people downloaded each podcast, according to *The Hill*, a Washington, D.C.-based political newspaper.

✓ **Appoint and train a media spokesperson:**

Whether you’re a huge national company, a small regional player or a 16-bed Mom and Pop, make sure you designate someone to field press inquiries in a time of crisis, says Atria’s Rains.

“The intention should be that you have nothing to hide,” she says. Because sincerity, candor and first-hand knowledge are important, Atria, which owns more than 120 properties serving 12,800 residents, usually taps the executive director at each building to act as a spokesperson.

“They know the property and residents best and usually know exactly what happened,” Rains says.

Bonus: The local executive directors also typically have an established relationship with the local press, she adds.

All spokespersons have a list of talking points that Rains has provided to them. Each point is based on the company’s mission, philosophy and priorities, such as that “the health and safety of our residents, their families and our employees is our highest priority,” she

SNF or ALF? Help reporters understand the difference

The potential for negative news stories about assisted living goes up exponentially when you consider that many reporters don’t know the difference between nursing homes and assisted living, says Patricia Lange, executive director of the Florida Assisted Living Affiliation (FALA).

Be sure to spend time helping reporters understand the difference between an assisted living company and a nursing home, including by inviting them for a tour, says Dr. Steven Fox, a geriatric physician who serves as an expert witness in medical malpractice and neglect trials.

“There’s a misunderstanding among the media about what assisted living is. Often, you’ll see reporters identifying an assisted living facility as a nursing home,” he says.

Adds Lange, “Sometimes a [tragic] story will come out and the newspaper will say it’s about an assisted living residence, but it’s actually about a nursing home. The media doesn’t understand the difference.” ♦

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says.

➤ **Tip:** Try to anticipate all of the types of questions that a reporter would ask and have ready answers – and then practice what you'll say.

Rains and her team later customize each talking point so that it pertains to the particular crisis at hand, and then role-play with the building spokesperson to help him or her practice answering media calls. ◆ --

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