

March 2023

Assisted Living Matters

Tips & Tools for Assisted Living Professionals

Assisted Living Matters is a monthly newsletter designed for those who strive for excellence in assisted living. Each month, we will provide you concise updates on the information you need to know, practical strategies to help you and your team, valuable tools and resources, and innovative tips and suggestions.

Strong Assisted Living Leaders Ensure a Great Experience for Residents, Families, and Staff **Featured Preconference Workshop for New Assisted Living Managers/Administrators**

A flourishing assisted living community starts with strong leadership. Confident, empathetic leaders understand that knowledge and compassion can be the foundation of the decision-making process. Successful leaders are able to blend regulatory compliance with the “soft skills” of customer service and employee engagement resulting in stellar experiences for residents, families, and staff.

LeadingAge Wisconsin is offering a special four-part, in-person training series designed to help assisted living managers/administrators to enhance their leadership skills and their ability to manage an assisted living community.

The first session of this four-part series will be offered in conjunction with the LeadingAge Wisconsin 2023 Spring Conference as a pre-conference workshop. This workshop will be held May 3, 2023 from 1:15 p.m. to 4:30 p.m. at the La Crosse Center in La Crosse, Wisconsin. In this first session, we will explore customer service and employee engagement. We also will introduce the concept of a facility assessment. Participants will begin to develop and refine the facility assessment for their organization.

By the conclusion of this workshop, participants will be able to:

- Define the concepts of customer service/concierge service and emotional intelligence.
- Discuss how to better manage staffing and scheduling challenges.
- List the components of a facility assessment and outline how the facility assessment relates to the program
- statement, admission/discharge criteria, policies/procedures, staffing, staff development, and competencies.
- Outline a facility assessment for your assisted living community.

To learn more about this workshop and the full conference, click [here](#). If you are ready to register, click [here](#).

The four-part series will continue with seminars in June, July, and August. The remaining three sessions in this series will explore how to operationalize the facility assessment as it relates to assessments, policies/procedures, care delivery, education, competencies, and audits. (See more details in the article below.)

Upcoming Seminar Series for Assisted Living Professionals

Our upcoming workshop series will help assisted living managers/administrators to enhance their leadership skills and their ability to manage an assisted living community. Each session will build and expand on the concepts of leadership and employee engagement. We will continue to expand and integrate the Assisted Living Evaluation Tool into daily operations and quality improvement. We will learn how to operationalize the Assisted Living Evaluation Tool as it relates to assessments, policies/procedures, care delivery, education, competencies, and audits. Attendees will gain the tools, tips, and resources necessary to succeed and find fulfillment in their leadership roles.

Introduced with Session 1 as a preconference workshop featured at the 2023 LeadingAge Wisconsin Spring Conference (see article above), this valuable four-part series will continue with three additional in-person seminars in the months following the conference. (Registration for the PC1 session can be [found here](#).)

For the [remaining three sessions in this series](#), we will offer the same training at three different locations around Wisconsin (Altoona, Appleton, and Dousman). Registration at each site is limited and registrations will be honored on a first-come-first-served basis. The topics within this series are as follows:

Session #2 of 4

The Greater Good: The Assisted Living Evaluation Tool as it Relates to Developing Policies/Procedures and Identifying Educational Opportunities

10:00 a.m. to 3:15 p.m. (CST)

- Altoona - June 14, 2023
- Dousman - June 20, 2023
- Appleton - June 22, 2023

DESCRIPTION: This session will build on the leadership concepts introduced in Session 1. We will continue to develop the Assisted Living Evaluation tool. In this highly interactive session, participants will break into groups and engage with peers and course facilitators as we consider how the Assisted Living Evaluation Tool can be used as the basis for developing policies and procedures that support quality of care. We will learn how to use the components of the Assisted Living Evaluation Tool to identify educational opportunities and plan for meaningful staff meetings.

OBJECTIVES:

- Participants will continue to build leadership skills and learn how to hold meaningful staff meetings.
- Participants will refine the components of the Assisted Living Evaluation Tool for their organization.
- Participants will develop a policy/procedure list for their organization and demonstrate the ability to write policies based on the Assisted Living Evaluation Tool.
- Participants will use the Assisted Living Evaluation Tool to identify educational opportunities.

Session #3 of 4

The Greater Good: The Assisted Living Evaluation Tool Supports Staffing Models and Regulatory Compliance Efforts

10:00 a.m. to 3:15 p.m. (CST)

- Dousman - July 12, 2023
- Appleton - July 13, 2023
- Altoona - July 18, 2023

DESCRIPTION: In this session, we will expand on the leadership concepts introduced in previous sessions. We will break into groups and learn from each other as we discuss how to use the comprehensive assessment to develop an Individual Service Plan (ISP). We will explore how the Assisted Living Evaluation Tool and ISPs can drive staffing models. Lastly, we will delve into regulatory compliance.

OBJECTIVES:

- Participants will identify the components of the comprehensive assessment and the individual service plan.
- Participants will understand how to use this information to support staffing models.
- Participants will explore various aspects of regulatory compliance.
- Participants will discuss key components to be aware of related to survey preparation.
- Participants will learn how to effectively manage self-reports.

Session #4 of 4

The Greater Good: The Assisted Living Evaluation Tool Drives Payment Models, as well as Audits and Competencies

10:00 a.m. to 3:15 p.m. (CST)

- Altoona - August 15, 2023
- Dousman - August 16, 2023
- Appleton - August 29, 2023

DESCRIPTION: In this session, we will expand on the leadership concepts introduced in previous sessions. We will break into groups and discuss how to use the information in the Assisted Living Evaluation Tool to support payment models and rates. We will strive to more effectively work with Family Care organizations. We will consider how to effectively set up a system of audits and competency checks to ensure regulatory compliance and quality of care.

OBJECTIVES:

- Participants will engage in a discussion about various models for level of care determinations/payment rates.
- Participants will learn how to use the information in the Assisted Living Evaluation Tool, comprehensive assessment, and ISP to set the payment rate and support appropriate payment from MCOs/Family Care Programs.
- Participants will understand the components of a Family Care contract.
- Participants will benefit from a discussion regarding effective onboarding processes for residents and families.
- Participants will explore how to set up a successful program for audits and competency checks, including the benefits of involving staff in the overall process.

Please note: Registration is for the series of three seminars (sessions 2, 3, and 4). The seminar offerings are not available individually.

CEUs are being offered by National Association of Boards of Examiners for Nursing Home Administrators (NAB) for this educational series.

This series is sponsored by:

Value First
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Value First is a group purchasing organization that provides free, no obligation services for LeadingAge senior living communities that can reduce their operational costs through discounted pricing and rebates on food, medical, janitorial, office supplies, and capital equipment. Value First is owned by LeadingAge and 25 state affiliates. Value First specializes in supporting the purchasing needs of LeadingAge members based on our extensive experience and knowledge of senior living.

Echelon Featured Video



Looking for a great video to share at an upcoming meeting to get your team focused on appreciating the work and efforts of others? Learn to celebrate the "small stuff" by creating and appreciating lollipop moments. Learn about this simple yet effective leadership practice [here](#).

Echelon Featured Tool



Echelon is a quality improvement program for those who strive for excellence in assisted living. Various Echelon resources, together with certain companion programs, are intended to support assisted living members who have embarked on quality assurance/risk management (QA/RM) activities that could result in positive change in their assisted living communities (ALCs).

A well-developed QA/RM policy is a fundamental component of an effective program. The Echelon QA/RM Initiative provides CBRF and RCAC communities with the tools and resources they need to create a sustainable program or enhance existing activities. Properly developed, an effective QA/RM program can improve the quality of care and strengthen your ALC's risk management activities.

The Wisconsin Health Care Services Review statute section 146.38 provides that any report or record kept or created by any person, organization, or evaluator for the purpose of reviewing or evaluating the quality of services of a health care provider is confidential and cannot be used in any civil or criminal action against the

health care provider, should be a guarantee offered in this initiative, if properly implemented, may allow an ALC to protect its quality assurance and risk management activities.

Information and guidance in writing and operationalizing your QA/RM plan is available on the Echelon websites.

- RCAC Echelon participants can access this information [here](#).
- CBRF Echelon participants can access this information [here](#).

Activity Idea of the Month

Learn from NASA Scientists and Engineers

“An Evening with NASA Scientists and Engineers” is an outreach program for senior living communities through which participants learn from and interact with a NASA scientist or engineer in a virtual setting. Participants learn about NASA science and engineering through a behind-the-scenes look from the people who work at NASA. The program focuses on both the stories behind the discoveries *and* the stories behind the people. The audience tunes in to the discussions via NASA Zoom Webinar, where they have the opportunity to ask questions throughout the approximately 30-minute program. A recording of each talk is added to a designated video playlist on the [NASA Stem YouTube](#) channel.

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Cost Savings Tip of the Month

5-Star Dining Program

Food is so important to resident satisfaction in senior living communities. Value First's program has cost-saving contracts with many of the same manufacturers that are found in five-star hotels and restaurants. Our approved suppliers provide everything from grocery staples to fresh produce, meat, poultry, and seafood. We outfit chefs and servers and dress your tables with china, glass and linens. Our experienced team of sourcing specialists helps you take advantage of trends, create savings through unique and flexible menu offerings, and enhance your dining experience.

Click [HERE](#) to learn more!



What Is eQuality?

Of particular interest to assisted living communities who strive for excellence in assisted living is eQuality -- the password protected section of the WCCEAL website. Available only to members of WCCEAL, eQuality consists of an annual resident satisfaction survey, an instrument to collect information about each member assisted living community's (ALC) quality improvement structure, processes, and outcomes, webpages for ALCs and sponsor associations to monitor their data benchmarked against other participating ALCs, and quality improvement tools and resources for ALCs and sponsors.

The resident satisfaction survey is administered at the ALC level once per year between January and April. ALCs and their sponsor associations can compare their performance with other providers in the state, in seven areas: staff, resident rights, environment, activities, meals and dining, health management/care, and overall ratings. The quality improvement data is collected from ALC members once per quarter providing information about the ALCs quality improvement structure, processes and outcomes.

The output of the system is a series of [web-based reports](#) on the results of the satisfaction measures, the quality improvement variables, and the ALCs' rate of participation in the data collection. These reports permit the participating communities to review their performance and compare themselves to their counterparts in the program. More extensive information on individual ALC performance and participation is available to the sponsors, such as LeadingAge Wisconsin, since they are integral to the feedback and quality improvement functions of WCCEAL.

This data powerhouse provides valuable benchmarks specific to any participating ALC. The ALC not only can compare itself to other like ALCs in a variety of areas but also can track its progress over time as it pursues continuous quality improvement. The eQuality data is a great complement to the LeadingAge Wisconsin [Echelon](#) program. Echelon provides you the tools and resources to implement quality improvement, and eQuality provides you the opportunity to track your progress.

To learn more, please contact [Janice Mashak](#) or [Robin Wolzenburg](#).

WCCEAL Reminders

Is your community participating in the Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL)? If so, please note these upcoming important deadlines.

The deadline for your 2023 Resident Satisfaction Surveys to be returned to WCCEAL is Saturday, April 15, 2023.

An assisted living community (ALC) must have at least one survey response in order to meet their WCCEAL membership duties. ALCs that reach a response rate of at least 25% (based on their 4th quarter reported occupancy) and have looked at their new satisfaction survey reports by the end of the reports review period may receive Gold Member designation. You can check on the number of surveys WCCEAL has received and recorded by logging on to the WCCEAL website (<https://wccéal.wisc.edu/>) and clicking on the Satisfaction Survey tab. The surveys are ALC site-specific so if you have more than one CBRF, RCAC, or AFH, you'll need to check the status of each location.

WCCEAL's Data Submission Window Opens April 1st.

It's nearly time to submit your assisted living community's (ALC) 2023 first-quarter QI data to WCCEAL. The data submission window **opens Saturday, April 1st**, and **closes Saturday, April 15th**. To submit your report, log-on to the [WCCEAL website](#) and click on the Quality Improvement Variables box.

If you need assistance, please contact [Janice Mashak](#) or [Robin Wolzenburg](#).

Thank you for your continued commitment to providing exceptional care to those you serve.

Is Echelon for You?

Through Echelon, LeadingAge Wisconsin is working to:

- Ensure LeadingAge Wisconsin Echelon members are recognized for their commitment to excellence in assisted living.
- Raise the level of quality throughout LeadingAge Wisconsin Echelon members.
- Empower Echelon members with the highest educational opportunities and tools to achieve the highest quality of care.
- Set a standard for all Echelon members.
- Be proactive.
- Increase efficiency and competency across the board.
- Increase members' critical thinking skills by the enhanced knowledge/education they receive.
- Demonstrate the fact that LeadingAge Wisconsin Echelon members strive for excellence in assisted living.

Through Echelon, LeadingAge Wisconsin provides a voluntary system of tools, guidelines, practices, educational opportunities, peer support, consulting services, facilitated discussions, and network meetings to enhance your quality improvement efforts. Our quest for quality is driven by our firm belief that your residents deserve excellent care and services.

Learn more about Echelon [here](#). Access the Echelon Participation and Attestation form [here](#).

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