10 Steps
to get started

ICAA/ProMatura Wellness Benchmarks

This tutorial introduces the 10 steps needed to begin using the ICAA/ProMatura Wellness Benchmarks.
To learn more about the system, join an Introduction to the ICAA/ProMatura Wellness Benchmarks webinar or download a brochure.

For more details, contact Pat Ryan at patryan@icaa.cc or visit the ICAA website benchmarking page at http://www.icaa.cc/Management/benchmarks.htm

Development and management

International Council on Active Aging is a membership association that supports professionals who develop wellness facilities, programs and services for adults over 50.

Principal: Colin Milner

www.icaa.cc

ProMatura Group is a nationally recognized full-service market research and consulting firm that has focused on the 50+ consumer for the past 25 years.

Principal: Margaret Wylde

www.promatura.com

International Council on Active Aging (ICAA) and ProMatura partnered because both organizations saw the need to provide a tool that would guide retirement communities as they developed lifestyle programs. ICAA brings an in-depth knowledge of wellness facilities and programs, while ProMatura brings expertise in data collection, management and interpretation. Throughout the development process, executives and wellness managers in retirement communities advised on the benchmark indicators through three work groups, several review panels and pilot sites.
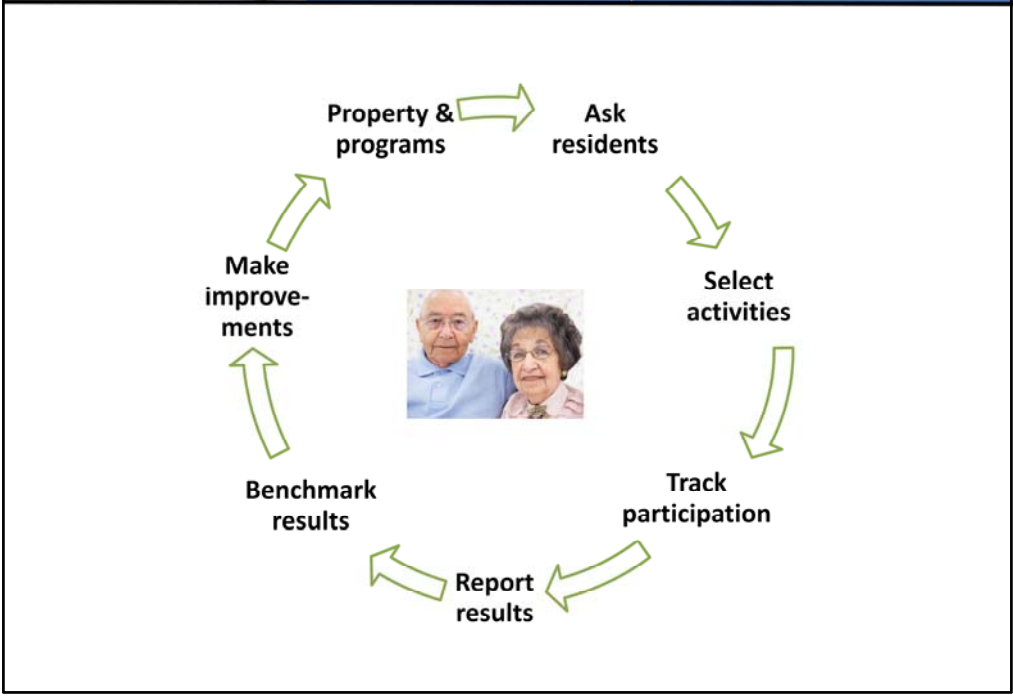
The ICAA/ProMatura Wellness Benchmarks translate the wellness program's results into the language of business. Using these metrics—the measurements of the program's outcomes—you can track results in a way that helps you and your colleagues understand how wellness contributes to the organization's mission.

You collect information about the community, the wellness program and residents who participate in wellness activities. The password-protected, secure system is an online application. You enter the information, and the analytics developed by the ProMatura Group make all the calculations and provide you with a variety of reports. The results are useful for your property, and are aggregated along with others, all anonymous, to derive a set of national benchmarks.

Start using the benchmarking system at any time—it's available year round.

- ICAA and ProMatura developed a suite of indicators that convert wellness outcomes into numbers that are organized and consistent.

- The benchmarks are appropriate for:
  - Independent living
  - Assisted living
  - Assisted living memory care
  - CCRCs
  - Active adult communities

- It is free to join with many free reports and some that require a fee.

- Longterm commitment gives you the best results.

The benchmarking system does not track residents in nursing care, staff or non-residents who may use the facilities. People in nursing care do not have the same access to wellness programs that IL/AL residents have.

The benchmarks do not track staff or non residents because the reports and analytics are cross-referenced to residents' views on their life at the community, as well as aspects of the property.

Once you have gathered information and are ready to enroll, go to:

http://icaa.promatura.net/wellness/

This screen is the benchmarking home page. You enroll only once, using the links in the left box. After enrollment, you log in through right hand box.

Choose your access

The ICAA/ProMatura Wellness Benchmarks application rests in the clouds. It is password protected. You can access it from a desktop or laptop computer, and it has been tested to be available through an iPad, a tablet using the Android operating system, a smartphone and an iPhone.

The Toolkit is available on your community's home page once you enroll. Many of the elements are also on the ICAA website www.icaa.cc/Management/benchmarks.htm or available by contacting program manager Pat Ryan at patryan@icaa.cc

The Toolkit has information sheets, worksheets and the Step-by-Step Guides that walk you through each screen of the system.

The system is open to retirement communities. Residents are categorized by their level of care, not by the building where they reside.

- Active adult (do not receive any services except for possibly lawn care and/or exterior home maintenance)
- Independent living (receive limited services such as housekeeping, dining and transportation, but do not receive any assistance with activities such as managing medications, bathing, dressing, grooming or getting from place to place)
- Assisted living, no dementia care (receive assistance with at least one of the following: managing medications, bathing, dressing, grooming or getting from place to place)
- Dementia care (receive assistance with at least one of the following: managing medications, bathing, dressing, grooming or getting from place to place)

The system uses the terms "wellness" and "activities."

Wellness is an umbrella term including fitness, activities, life engagement, resident life and other terms used to describe the function providing quality-of-life services. It does not refer to a department name. This is the same big-picture view that current and potential residents have, and their adult children have.

Activities is also an umbrella term used to include fitness classes, clubs, workshops and other types of classes. ICAA/ProMatura provides a list of generic types of activities; you choose those that you offer.

10 Steps to Get Started

1. Understand the big picture of the system
2. Gather your allies: senior management, colleagues, residents
3. Choose the administrator
4. Assign job responsibilities (including your own)
5. Enter information using the ICAA/ProMatura definitions
6. Choose the activities/classes you will track
7. Enter residents into the system
8. Set up system to track attendance
9. Administer resident surveys
10. Maintain the data entry
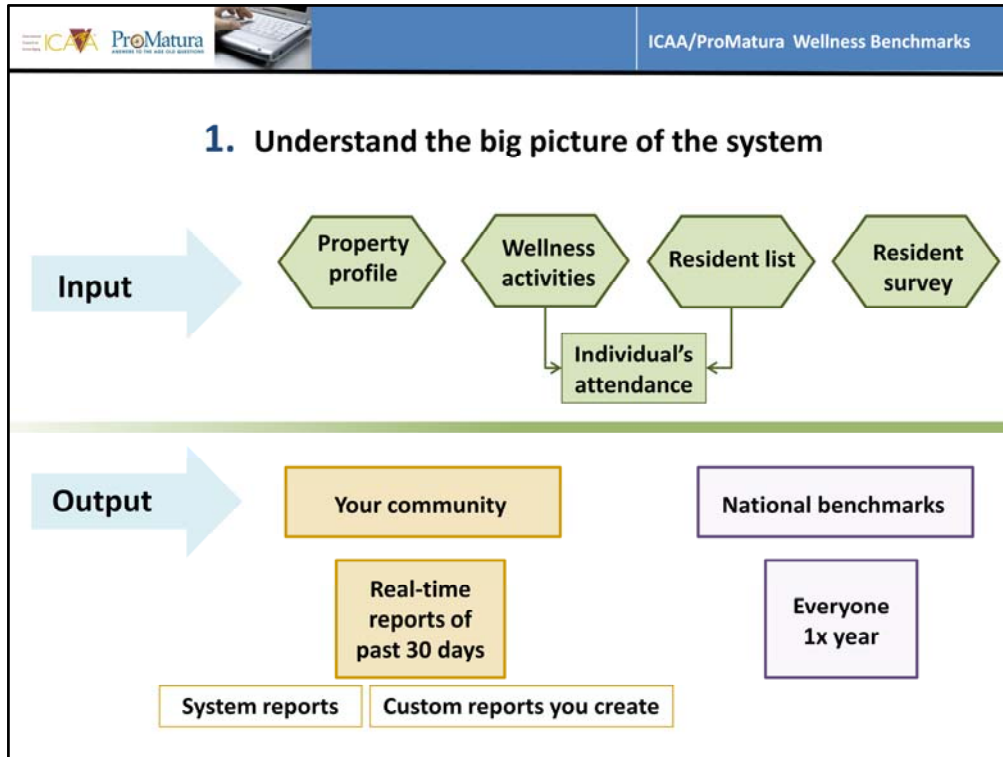
Input:

Each property has password-protected access to the system. Enter information about the property and staff once a year (or more frequently if desired). The property profile (called the Community Survey) contains the basic demographics and property description used to sort the data. The Community Survey is a key part of the competitive overview in the national benchmarks.

The Wellness activities are the sample of your programs that you are tracking for the study.

A list of Residents participating and not participating in the program is created (one time).

The attendance of individuals who attend an activity is entered for each date of attendance.

Once a year, Residents complete a short satisfaction survey. This information is critical for evaluating if/how attendance (or nonattendance) in wellness activities impacts the residents' overall satisfaction with the community.

Output:

Each community: you can generate reports in 3 ways: online and as PDF and Excel downloads. The system contains some analytics to compare and contrast the data for analysis.

National benchmarks are prepared from the aggregate data of all communities.

This is the type of information you will collect for each portion of the benchmarks.

For some items in the Property profile and for the Residents you will likely need to check with others. The Toolkit has paper versions that you can print and hand out. It also contains information sheets on figuring average length of stay, the classification of levels of care, wellness activities and the resident survey.

After you enroll, your home page shows these sections.

Plus, reports are here

This is your home page. It has links to the four sections that you input, as well as to the reports.

More information on the reports is available in the tutorial on "Making the Most of Reports."

ICAA/ProMatura Wellness Benchmarks

Gather information

Print out the questions and information sheets (in Word of PDF) to make it easier to see each section, to give to colleagues, residents.

Then, transfer the information into the system.

These forms are available on your home page after you enroll.

- Community Survey
- How to Figure Average Length of Stay
- Activities to Track (Word) (Excel)
- Resident Guide to the Online Benchmarking System
- Resident Satisfaction Survey
- Resident Activities Log

2. Gather your allies: management, colleagues, residents

Meet with the resident council & members of the wellness committee

Use the information sheets in the Toolkit

Introduce the benchmarks to senior management, your colleagues in other department who may be providing information, and the wellness staff. For senior management, the brochure on the benchmarking process and benefits explains how the ICAA/ProMatura Wellness Benchmarks system will help you show the contribution of the wellness program to the community's mission and business objectives. It also provides information for the management of the program.

Explain to wellness staff how gathering information for the ICAA/ProMatura Wellness Benchmarks will benefit them. Staff members may initially see only that it is extra work. However, the benchmarks will give them a way to analyze the program as a whole and present the case for wellness during budgeting. When a staff person wants to purchase a new item, pay for a new program or work more effectively with other departments, the benchmarks will be important part of the planning.

As one wellness director who uses the benchmarks said, "I use the benchmarks to keep my job!"

Discuss the benchmark's generic use of the terms "wellness" and "activities" and apply these to your organization's structure so that everyone understands what activities and personnel are included. The purpose is to ensure staff members recognize their role in implementing the benchmarking system, whether or not their job title or department is called "wellness."

One username/password is for the Administrator. This is the ONLY person who can see everything in the system: the Community Survey and all of the Participants and Activities. This is the username/password that you log in with when enrolling in the system.

The Administrator can monitor that the Staff is using the system and keeping it up to date. The Administrator can also can generate reports at any time.

Remember, each property enters information independently. If your organization owns multiple properties and your position requires you to oversee more than one, there are three options.

1. Set up a private benchmarking group for your company (or the properties that you manage). There is a one-time fee for the set-up, but then a "Corporate Administrator" can access all the properties in the group. This also creates an aggregate benchmarking report of all the properties in the group.
2. Have each Administrator at a property share their passwords. You will see each individual community, but not an aggregate.
3. Enroll yourself as the Administrator at each community, with a different login/password for each one. Give a staff password to up to 4 staff at each property. You will be the only one who can complete and maintain the community profile and generate reports. There will be no aggregate of all the properties.

The Administrator's username and password can be changed to insure continuity of your community's data. This is another key: if the Administrator changes, change the username/password but do not start a "new" community.

Change the Administrator in Settings or by contacting patryan@icaa.cc

Only the Administrator can assign passwords/logins to staff members, and only the Administrator can change these.

ICAA/ProMatura will secure the logins/passwords. It is your responsibility to keep these secure in your organization.

4. **Assign job responsibilities (including your own)**

Who?

- Accounting staff
- Fitness instructors, activities staff, resident life
- Front desk or clerical staff
- Wellness director
- Intern

Determine who will have passwords to access the online benchmarking system. Your community can have up to 4 user names/passwords for staff to access the system. Staff logins only see the list of residents and the list of activities. You may assign this to wellness staff, or to an administrative person who collects schedules, sign-in sheets or attendance logs from the wellness staff.

One community created an internship for a business major at a local college who did all the initial data entry and then visited the residents to administer the resident survey. Residents were comfortable answering the questions because the intern was a "neutral" person who was on a short term assignment.

Examples of job description items:

- Ownership and management of the system
- Taking attendance, identifying individuals, in classes/activities
- Entering information in the ICAA/ProMatura Wellness Benchmarks according to ICAA/ProMatura requirements
- Entering residents and resident surveys
- Entering participants attendance into system at least once each week
- Entering activities and updating
- Downloading community reports once a month
- Updating Community Survey once a year

Assign one staff member to have ownership of the benchmarking. Make this a job description responsibility. Place the responsibility for providing the data, or reporting the data, into job descriptions and monitor compliance through the organization's performance management process.

The benchmarks have a challenge: to get as close as possible to an apples-to-apples comparison across many types of communities.

It is critical that the people who input data follow the definitions and instructions provided by ICAA/ProMatura. Entering "clean" data benefits you because your reports are accurate, and benefits the industry because the more communities that enter data correctly, the more you can have confidence in the accuracy of comparisons to the national benchmarks.

You'll find the definitions in the Toolkit.
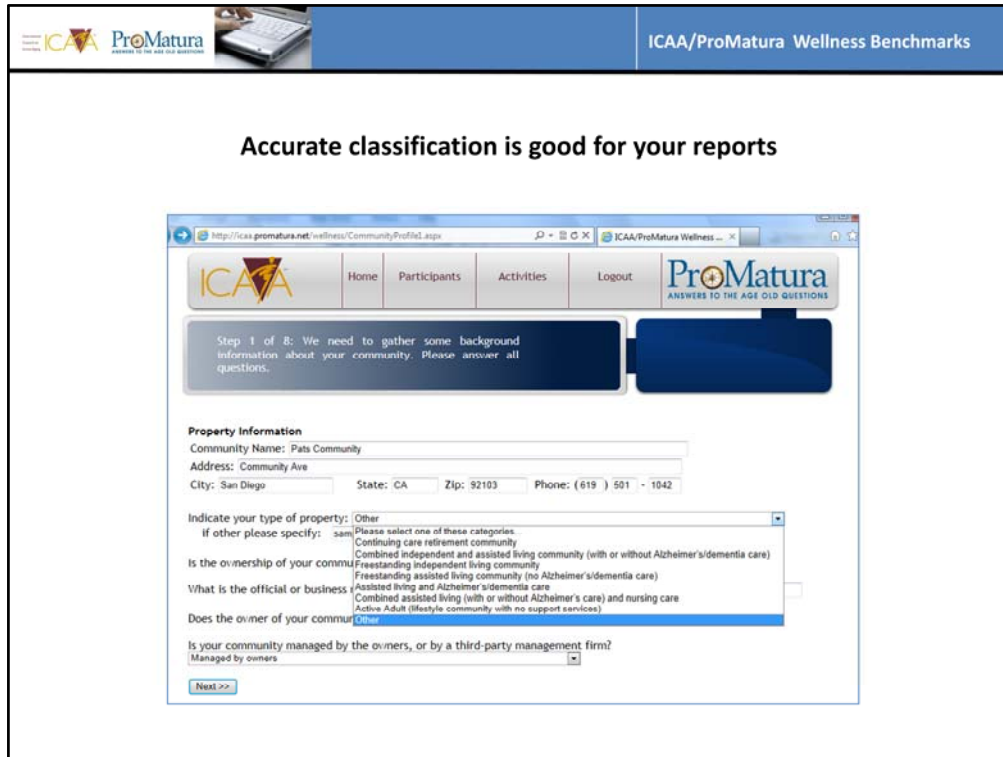
This is the first page of the Community Survey. Be sure to accurately classify your community, not by marketing language, but by these definitions.

Definitions:
Active adult (do not receive any services except for possibly lawn care and/or exterior home maintenance)
Independent living (receive limited services such as housekeeping, dining and transportation, but do not receive any assistance with activities such as managing medications, bathing, dressing, grooming or getting from place to place)
**Assisted living**, no dementia care (receive assistance with at least one of the following: managing medications, bathing, dressing, grooming or getting from place to place)
Dementia care (receive assistance with at least one of the following: managing medications, bathing, dressing, grooming or getting from place to place)

6. Choose the activities/classes to track

7 categories

Assessments

Cognitive skills

Dancing

Formal volunteer program

Groups and Clubs

Lifestyle – health education

Physical activity

Everything you do

Led by residents, volunteers

Generic activity types

Led & planned by staff
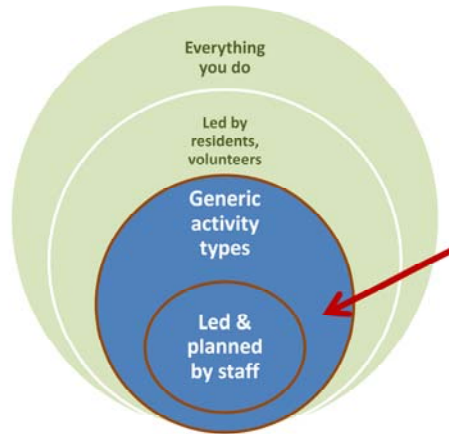
Your community likely has a number of lifestyle options, or plans to add these. The ICAA/ProMatura Wellness Benchmarks system tracks the participation of residents in seven categories. Within these there are about 100 activities on a list of generic names provided. Choose activities that are managed or led by a staff member because marking the attendance of each individual is a job description responsibility.

Tracking the participation of every resident in every activity would be burdensome. The generic categories, and the classes/activities/group listed with them, were chosen because these are purposeful and generally relate to an evidence base.

For example, there is a strong evidence base that physical activity enables functional independence (our goal), and moderate evidence that cognitive training and social connections lead to mental health and functional independence. That's why there are so many items in these domains. There is good evidence that chronic disease self-management programs work, and there are activities in that domain. Many activities on the list result in social interactions, which link to a growing base of research.

Once you enter an activity, it always stays in the system; it's not deleted.

If you cancel that activity, or don't offer it year round (for example, cancel water fitness in the outdoor pool during winter), then click at the top to suspend the activity. If it starts again (eg, water fitness during the summer) then click and it's back on the schedule.

If the time or day of the week changes but the class is essentially the same, simply change the scheduled times that it's offered. If you substantially change the content of an activity, then suspend the current version and add a new activity.

ICAA ProMatura ICAA/ProMatura Wellness Benchmarks

Your class/activity list

Activities to track in wellness program benchmarks

Types of activities to track

Physical activity
Aerobics and strength training class
Aerobics class
Aerobics class on chair
Aerobics, strength and flexibility class
Aerobics, strength and flexibility class on chair
Arthritis exercise class
Balance training in group using bands, tubing
Balance training in group using tape and foam mats
Balance training one to one with personal trainer
Balance training using computerized machine
Cardiac rehab exercise class
Cardiovascular exercise on machine, with time measured by computer
Chair dancing

Strength training on machines, with sets/reps measured by computer
Tai Chi
Tai chi and qigong class
Walk in group with GPS game
Walk in group with poles
Walk in group, high intensity
Walk in group, low intensity
Walk in group, moderate intensity
Walk with pet
Water aerobics and strength training class
Water exercise for arthritis
Water exercise for balance
Water exercise for Parkinson's disease
Water exercise for weight management
Water tai chi
Water volleyball
Water walking

Meditation class
Stress management workshop
Cooking class
Exercise and healthy eating program
Healthy eating/nutrition workshop
Weight management program with exercise and nutrition

Cognitive skills
Brain fitness class using computer
Brain fitness class using games, puzzles
Memory and trivia games
Memory improvement workshop

Assessments
Assessment, blood pressure
Assessment, body fat
Assessment, cholesterol

Who attended these events?

These activities were scheduled to occur on the specific dates. Click on them to confirm who participated.

Arthritis water program	Thursday, April 14, 2011
Braintastic	Thursday, April 14, 2011
Express yourself	Thursday, April 14, 2011
Fit living	Thursday, April 14, 2011
Fitness Center visits	Thursday, April 14, 2011
Gentle tai chi	Thursday, April 14, 2011
Whole person exercise	Thursday, April 14, 2011
Bottom up yoga	Wednesday, April 13, 2011
Braintastic	Wednesday, April 13, 2011
Express yourself	Wednesday, April 13, 2011
Fitness Center visits	Wednesday, April 13, 2011
Water volleyball	Wednesday, April 13, 2011

Partial list of generic activities tracked in the system.

How this looks for your community.

Choose the activities you will track from the list provided by ICAA/Promatura. These are "generic" names, like Aerobics Class on Chair or Laughter Yoga or Theater group. Choose the number you can manage, perhaps start with 10-15 and then build from there. This list of generic activities is in the Toolkit.

Choose activities/classes/events where you are confident you can identify individuals each time the activity is offered. Usually this means the activity/class/event is led or managed by a paid staff, where attendance is part of the job description.

IF you wish to track participation in an activity that is not on the list, you can classify it as "Other." It will appear in your personal reports, but will not be included in the national benchmarks.

Best practice: update class attendances every week. Otherwise that list can get very long. Besides, your reports are in real time and will not be accurate.

The ICAA/ProMatura Wellness Benchmarks system enables you to move beyond counting attendances, to counting the impact of attendance (or not) on resident's perception of the dollar value of the community, their perception of their health, and ultimately, whether participation helps people remain independent.

Enter at least 35-50 residents for a sample to reflect your program. The more residents in the system, the more representative your reports.

You can enter residents who participate in the wellness program, along with those who do not. That way you can compare both groups.

You can enter residents in batches. For example, 10-15 residents at a time.

You will need: resident name, month/year of birth, month/year moved into community, month/year started wellness program

These dates are entered only once. The system takes over and does all the calculations on age, length of stay and time spent in wellness.

Once a resident is entered, he or she will be placed on the list of residents. The default is "participating." Once a resident is entered, he/she is never deleted.

Instead classify each person as participating; participates and takes surveys by activities not tracked; does not participate but takes surveys; temporarily in therapy; unable to participate; moved away; passed away; error or duplicate; chooses not to participate.

When a resident's lifestyle changes, change the category. Otherwise, your statistics won't be accurate.

When you begin marking which residents participated in an activity, only those classified as "participating" will appear.

8. Set up system to track attendance

The system could be attendance sheets that the leader/instructor completes. You can use the ICAA/ProMatura provided Excel worksheet to customize the sheets to your needs. Benchmarks users say that they know who regularly attends an activity/class. They prepare attendance sheets, in advance for a week or a month and distribute them. There are extra blank spaces left for new people. The leader/manager only has to check off who was attending that day. Residents can also check their names on the sign-in sheets. Attendance sheets are gathered and input into the system at least once a week.

Another approach is for the instructor/leader to use a laptop, iPad or smartphone to log in to the system, and enter attendance immediately. If the instructor/leader does this, it prevents the second step of having someone enter the information.

Since there are so many notebook computers and smartphones on the market, but sure to test access to the system using these tools. A person with a Staff password can ONLY see the list or residents and activities, and that is password-protected.

From the list of activities that automatically appeared based on the frequencies entered, "Whole person exercise" was chosen. Click on the name.

That activity appears. The name is in the left top box and the date is in the right top box. The names of all participating residents is below. Click on those who did (or did not participate) and submit.

This records and the activity on that date disappear from the screen.

ICAA/ProMatura Wellness Benchmarks

Community A
193 participating residents

- Uses paper attendance sheets
- Generates list of "regulars" in alpha order; new people sign in
- Pool is sign-in only, takes longer because not in alpha order
- Less than 2 minutes per class, e.g., 11 land classes took 14:38 minutes and 10 pool classes took 10:35 minutes
- Data entry: wellness staff member who also teaches classes

Community B
589 residents in log

- Uses paper attendance sheets
- One minute per class
- Data entry: staff member who roves among several departments performing administrative and other work as needed, visits wellness dept. a couple times/week to maintain system

Community A and Community B use the ICAA/ProMatura Wellness Benchmarks system and tracked their time spent on the weekly logging of residents' attendance.

The benchmarks system goes forward in time.

- Each day's Activities appear about midnight of that day.

- If you enter a resident after that, the name will not appear on the list.

- If you want to enter an event that happened two weeks ago…nope, won't work.

- You can go back in time to past activities to update or correct attendances.

When you add residents who do not participate to the log and gather their opinions on the once-a-year resident survey, you gain valuable insight into the value of wellness—or the need to improve the quality of the wellness program. This is a powerful information for internal evaluation, and also to leverage grant dollars, resident fundraising and bank loans when it comes time to build or renew wellness facilities.

The survey can be administered on paper, or online. ICAA/ProMatura provides the paper version along with information sheets for residents on the benchmarking survey and privacy policy. All of these documents are in the Toolkit on the home page of your enrolled community.

No personal information related to healthcare or finances is collected.

Tips for resident surveys
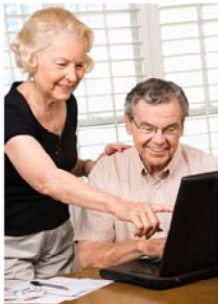
- Administer as part of a special event, eg, Active Aging Week or a semi-annual fitness assessment.
- Hire an intern to set up, visit residents and administer. The intern, on a short-term assignment, is "neutral" so residents are more comfortable offering opinions.
- Ask a colleagues who is not associated with wellness to enter the resident surveys.
- Shred paper surveys after results entered into the system.
- Combine with another campuswide survey, but don't change the questions. This only works if the campus survey is not anonymous.
- For anonymity, assign resident a user name/password; open survey on any computer or laptop, invite resident to sit and complete, walk away. Once the Submit button is hit, the answers disappear from the screen.

The survey is not anonymous, since the results must link to the resident. Some people don't mind putting their names on the survey, but others do. Reassure residents that their opinions are needed for a longterm study and honesty is important to improve the wellness program and community services.

These are a few ways to administer the survey.

10. Maintain the data entry

The value of tracking the wellness program is comparing changes over time.

Entering information, consistently, over time is the way to truly see how changes you make in wellness affect the lives of your residents, and the goals of the community.

Choose one day of the month, maybe the first or last day or the 15th, to generate and save your reports.

Recognize that the initial gathering of data and inputting into the system is a time commitment. However, once that initial data entry is completed, there will be much less time needed for maintenance. As with any new software, learning the system will take practice. Once staff are familiar with the software, efficiency will improve.

You can support the staff by helping them carve out the time to participate. This could be done by temporarily or permanently reassigning tasks, using temporary assistance from other departments or outside organizations or hiring an intern.

7 days	Update the classes once a week
30 days	Download reports in PDF or Excel; online results show 30 days prior
90 days	That's one-quarter of the year, you may want to analyze your 30-day downloads
365 days	Update the Community profile; administer Resident survey

Your reports are in real time, meaning they reflect the current information in the system. If you look at a report at 9:00 am, then update attendance in activities and maybe add residents or submit a few resident surveys, that at 11:00 am the reports you generate will be a bit different, showing the new input.

The reports show the prior 30 days. This is key. It pays to schedule updating the list of Activities with residents who participated once a week. If you get behind on recording attendances and say, skip two weeks, then your reports are going to show very limited participation.

Do choose one day of the month, maybe the first or last day or the 15th, to generate and save your reports. Even if you don't look at them, you will have them to track changes in the program from month-to-month, or every quarter.

You can update the Community Profile at any time, but be sure to do it once a year. This is important for accurate cross-tabs. A reminder pops up on your home page when the update is due.

The Resident Survey is likewise updated once a year, on the anniversary of the first time it is completed and submitted. A reminder pops up on the resident log when it is due.
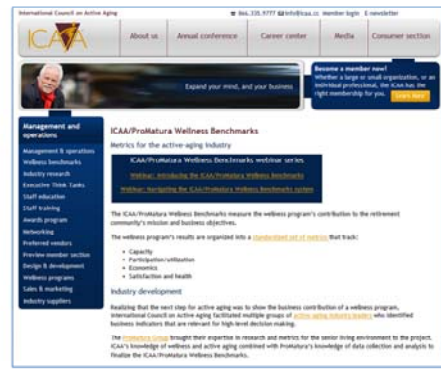
We are here to support your benchmarking.

You can schedule a custom webinar and tour of the sample community. Just contact patryan@icaa.cc

THANK YOU

ICAA/ProMatura Wellness Benchmarks

Visit ICAA
www.icaa.cc/Management/benchmarks.htm

Pat Ryan
patryan@icaa.cc
info@icaa.cc

ICAA/ProMatura Wellness Benchmarks

ICAA and ProMatura appreciate the work you do to bring quality of life to older adults. By joining the benchmarks, you gain valuable information for the program, senior management, the senior living industry—and most important, the older adults you serve.