

This is a high-level overview of the ICAA/ProMatura Wellness Benchmarks.

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>

Additional webinars focus on entering the system, navigation and using the reports to best advantage.

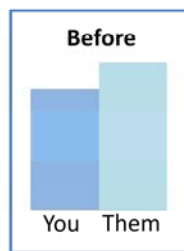
	<h1>developers</h1>
<h2>Development and management</h2>	
	<p>International Council on Active Aging is a membership association that supports professionals who develop wellness facilities, programs and services for adults over 50.</p> <p>Principal: Colin Milner www.icaa.cc</p>
	<p>ProMatura Group is a nationally recognized full-service market research and consulting firm that has focused on the 50+ consumer for the past 25 years.</p> <p>Principal: Margaret Wylde www.promatura.com</p>

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.

You do not have to be an ICAA member to benchmark using the system (but it's a great idea!).

Benchmarking has 2 goals

1. Improve quality
2. Improve processes



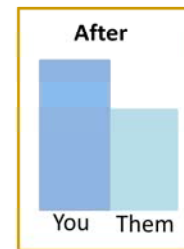
Uses numbers to report outcomes



Compare your results to others, especially best in class



Compare results over time



Benchmarking is a system used in many businesses and service organizations, whether for-profit or non-profit.

When you look at the semi-annual ICAA Industry Development survey to see what kind of bricks-and-mortar wellness facilities other communities have, or which programs are increasing, you are comparing what you have to others. When a not-for-profit compares their fundraising level from one year to another and then to the levels of all the not-for-profits in national surveys, then that's a type of benchmarking, too.

For benchmarking to have the most meaning, the items compared must be as similar as possible.



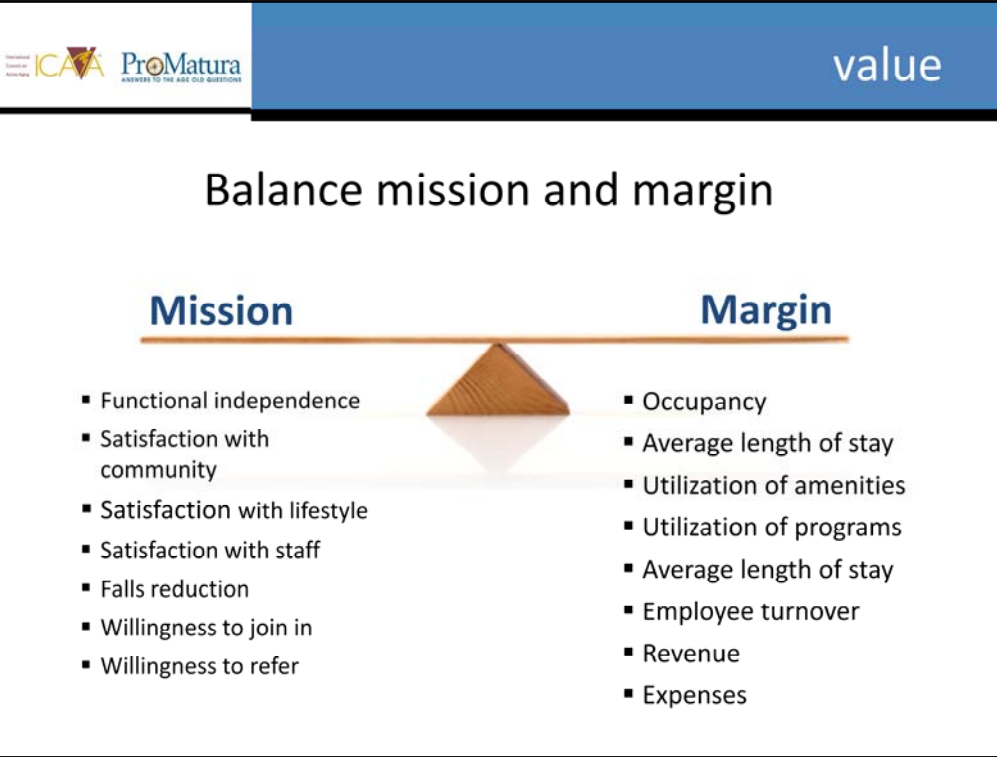
ICAA and ProMatura developed a suite of indicators that convert wellness outcomes into numbers that are organized and consistent.

You can track the results for each property over time—
benchmarking to yourself
AND benchmark your property
against all others in the system.

Strategic alignment, business alignment. Today all services and products must align with the overall mission of the organization.

The ICAA/ProMatura Wellness Benchmarks apply the concepts of benchmarking to the wellness function.

The online system is password-protected, and all standard security measures are in place. You control security on your end by controlling who has a password, and updating passwords if a person changes positions.



Everything goes back to the mission, the purpose of your organization. But, margin is also needed to provide the funding to deliver the mission. This is the case whether an organization is not-for-profit or for-profit. The ICAA/Promatura Wellness Benchmarks provide information to help you balance mission and margin.

Mission: quality of life for older adults, helping them stay functionally independent for longest length of time.

Business objectives: occupancy, resident satisfaction, average length of stay

Decision making: competitive positioning, staffing in relation to program and satisfaction.

Occupancy is the key metric for senior housing. Nowadays, it is the service offerings and lifestyle that distinguish retirement communities, and provide the competitive advantage to maintain occupancy levels. The benchmarks organize the indicators that link Mission with Margin.



ANSWERS TO THE AGE OLD QUESTIONS

why

Residents



Active Aging Week 2008
Essex House, LeMayne PA

- Meaningful programs
- ROI on *their* investment in you

Staff



Liberty Heights, Senior Lifestyle
Colorado Springs, CO

- Annual budgets
- Program evaluation
- Counseling
- Marketing

Decision makers



- ROO, ROI
- Annual budgets & allocations
- Performance measures
- Competitive intelligence
- Data for investors, grantors

10 Reasons to benchmark wellness

1. Evaluate effectiveness of new and ongoing activities
2. Identify options to improve or expand
3. Gather data for lenders, grant writers and marketing
4. Monitor competition for yourself and for potential residents
5. Guide decisions on funding and purchasing
6. Help residents stay functionally independent (more revenue, less costs)
7. Set performance objectives and monitor results
8. Establish recognition and reward system for staff
9. Demonstrate the value of the program to senior management, the board of directors, financiers, colleagues and residents
10. Engage staff and residents in wellness outcomes because value is known



“Wellness is a difficult concept to operationalize.”

“Questions on the resident survey proved to be very helpful, especially ‘the wellness program was one of the primary reasons I selected this community.’ Over half (64%) of wellness participants strongly agreed.

Satisfaction with the overall community was 78% among wellness program users.

Vice president,
multiple
communities
contributing data
since February 2011.

“The metrics warranted a lot of praise and really validated our efforts. Now I am going on a ‘tour’ to present the information to the resident council and the marketing group.”



benchmark



Enrolled retirement communities:

- Independent living
- Active adult
- Assisted living
- CCRC
- AL memory care



Wellness can live in several departments:

- Resident services
- Fitness
- Life engagement
- Activities
- Recreation
- Therapy....



Activities is a term to describe any wellness offering:

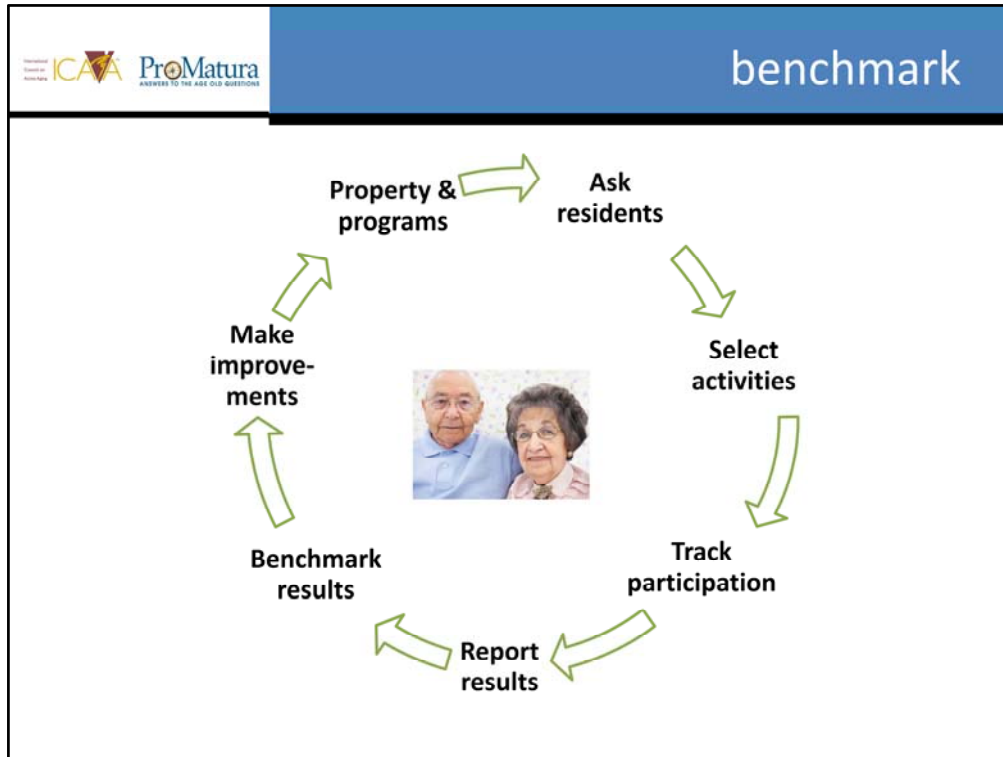
- Fitness classes
- Social or intellectual events
- Clubs
- Workshops
- Disease management

The system is open to retirement communities. Residents are categorized by their level of care, not by the building where they reside. ICAA/ProMatura provides definitions. Residents in nursing care are excluded because these people generally do not have access to the same level of wellness programming as more independent residents have, are limited by health status and dependent for transportation. At this time, the system is collecting information only on residents, since calculations relate to satisfaction with overall community. The system does not have a module for employees or wellness center members who live outside the retirement community.

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.



The ICAA/ProMatura Wellness Benchmarks help you close the circle on investment in wellness, wellness's return to the resident's functional ability and satisfaction, and thus to the company's bottom line.


- You enter information about your property, once a year.
- Enter a list of residents. Once a year, ask residents a few questions about their perceptions.
- Choose a sample of activities, fitness, health promotion you will track.
- Enter who participates in each activity.
- See the outcomes in reports available online and that you can download.
- Keep the reports so you can see how changes to the programs or facilities or staff affect the results.
- Make changes to improve quality outcomes or your efficiencies and systems.
- Keep going.

International
Council on
Aging ICAA ProMatura
ANSWERS TO THE AGE-OLD QUESTIONS

how

Online, secure, confidential

- No one sees the input or output except you and the staff you designate
- You can change passwords if a staff member leaves
- No proprietary information (eg, financials, salaries) is collected
- Resident privacy is protected by not gathering personal health information. Does not conflict with HIPPA.
- Reports are aggregate



Each property controls access to the system. The Administrator login/password is the person who can see everything in the system. The Administrator gives access to staff members (up to four passwords) and blocks access if a staff member leaves. This login can be assigned to a new staff member.

Staff passwords can see only the list of Residents and the list of Activities.

The Administrator can assign login/passwords to residents who can track their own activities. Residents see only their own record and the list of activities; they cannot see anything else in the system. The residents login/password feature can be used by staff for residents to complete their surveys confidentially.

Single property



Each property has unique passwords, data and reports

Corporate accounts

(private benchmarking group)

Multiple properties are identified as part of a single group, with access given to a single Group Administrator. Each property in the group enters its unique data.




All the reports are based on information provided by individual properties. This information is returned to each property in the form of reports. The data, anonymous, is aggregated to include in the national benchmarks.

Corporate accounts are an excellent choice for organizations with 5 or more properties. Each property is provided with a code that includes it in the group. Each property receives its unique reports. The Corporate report contains a summary of all properties in the group, allowing the Group Administrator to look at the group as well as comparing each property to the group. The group can then be compared to the national benchmarks.

International
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ANSWERS TO THE AGE OLD QUESTIONS

how

Choose your access



You have a list of residents and a list of activities. At least once a week, enter the residents who participated in each activity.

The ICAA/ProMatura Wellness Benchmarks is an online system that is password protected.

You can log on from a desktop computer or laptop, tablet computer or smartphone.

You can use paper to perform tasks, such as checking an attendance list and keying in the participants later. Or, use a laptop or tablet computer or smartphone, which enables staff to enter in attendance right from the classroom or activity location. The system has been tested using an iPad and an iPhone, and a Samsung Galaxy tablet and smart Be sure to double check compatibility with any device that you use.



community



Property profile

How does your property compare to others?


- Brick and mortar: buildings, rooms, trails, shops, pools...
- Wellness services: social gatherings, lifelong learning, fitness, disease management...
- Staffing: number, education, experience
- Resident census in IL and AL, participation, falls history

Collect the information by printing out the survey in the Toolkit. And, go to the Step-by-Step Guide.


Estimated time to collect information: depends on community recordkeeping. You will like work with other departments to access some information.

Estimated time to enter into the system: one hour

Frequency: Once a year, update any time.




residents



Track individuals over time

Q: Does engagement in the wellness program lead to:

- Resident satisfaction
- Functional ability
- Longer, healthier, happier life?




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 the names of residents who participate in wellness (as well as those that do not). For each resident, also enter resident month/year of birth, month/year of move-in, month/year started wellness, II or AL level of living. Once you enter these dates, the system performs all the calculations so you don’t have to. It will automatically track ages, lengths of stay, level of care in relation to participation and such.

Estimated time to collect dates and level of care: depends on community’s records or residents knowledge.

Estimated time to complete record for each resident: 1 minute




residents

How do residents rate the community?

- ✓ The dollar value of the community
- ✓ Wellness as a reason for move-in
- ✓ Their satisfaction overall community
- ✓ Their perception of their own health
- ✓ Their satisfaction with the wellness program and the staff

Compare residents who participate ...



Resident survey

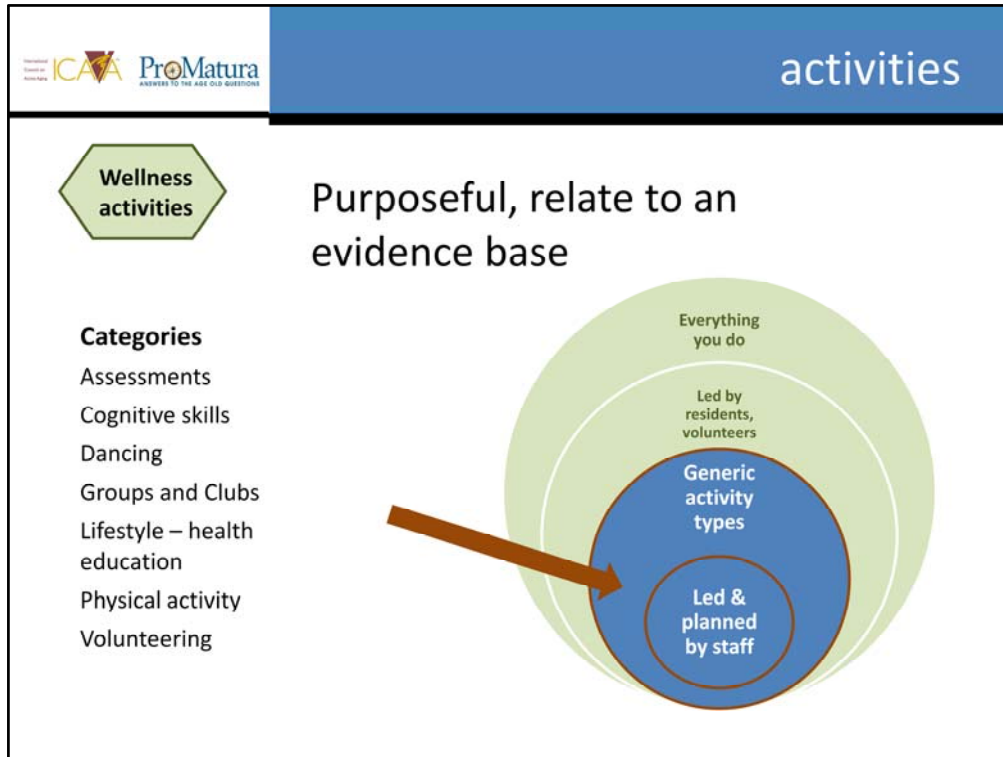
...to residents who do not.



Once a year, administer a survey. There are 7 questions, with multiple choice answers.

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 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.

Estimated time for staff to enter resident opinions from paper survey: 1 minute
 Estimated time for residents to complete paper or online survey: depends on cognitive skills, perhaps 5-10 minutes



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 several categories.

Tracking the participation of every resident in every activity is burdensome.

The generic categories, and the classes/activities/group listed with them, were chosen because these 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.

Choose activities that are managed or led by a staff member because marking the attendance of each individual is a job description responsibility.

Estimated time to enter each Activity: 2 minutes or less

Once an Activity is entered, it is never deleted. If it is no longer available, one click “suspends” the activity.

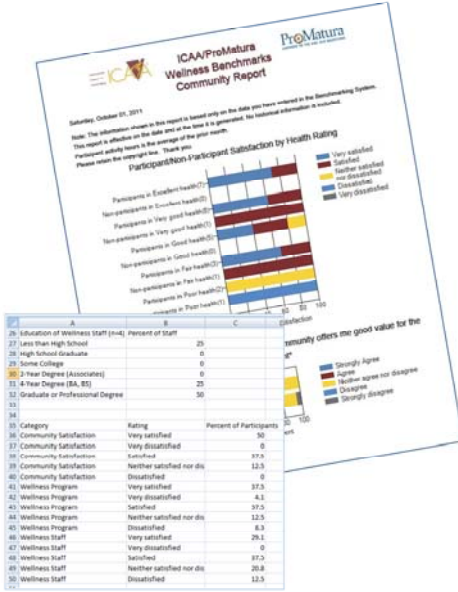
Time to track resident participation per class/activity: Depends on how many residents in the system, and method used to collect attendances. Approximately 30 seconds to 1-2 minutes.



“Why did I start using the benchmarks?”

“To keep my job!”

- Wellness director, stand-alone retirement community
contributing data since February 2011



The image shows a slide with the ICAA/ProMatura logo and the word "reports" in a blue header. The slide lists various report types and includes a preview of a "ICAA/ProMatura Wellness Benchmarks Community Report" for October 01, 2011. The report preview features a bar chart titled "Participant/Non-Participant Satisfaction by Health Rating" and a table of satisfaction data.

ICAA/ProMatura generated Annual

- Industry benchmarks
- Community trend (after 2 years)

User generated On demand

- Corporate (private benchmarking group)
- Community trend report
- Participant review
- Community detail report
- Community snapshot
- Resident log, Activities log

Category	Rating	Percent of Participants	
36	Community Satisfaction	Very satisfied	90
37	Community Satisfaction	Very dissatisfied	0
38	Community Satisfaction	Satisfied	97.9
39	Community Satisfaction	Neither satisfied nor dis	12.5
40	Community Satisfaction	Dissatisfied	0
41	Wellness Program	Very satisfied	37.5
42	Wellness Program	Very dissatisfied	4.1
43	Wellness Program	Satisfied	37.5
44	Wellness Program	Neither satisfied nor dis	12.5
45	Wellness Program	Dissatisfied	4.3
46	Wellness Staff	Very satisfied	26.1
47	Wellness Staff	Very dissatisfied	0
48	Wellness Staff	Satisfied	37.5
49	Wellness Staff	Neither satisfied nor dis	26.8
50	Wellness Staff	Dissatisfied	12.5

The user-generated reports are available as PDF or Excel, and show the prior 30 days. Save these to track changes on a monthly or quarterly basis.

The national benchmarking reports are produced annually by ICAA and ProMatura.

A description of the reports is in the PDF titled "ICAA/ProMatura Wellness Benchmarks Overview."

The ICAA/ProMatura Benchmarks collects the data on each individual property. You can track the results:

- Single property to single property
- Single property to national benchmarks
- Single property to private benchmarking group to national benchmarks

Draw the line to mission and margin

Satisfaction

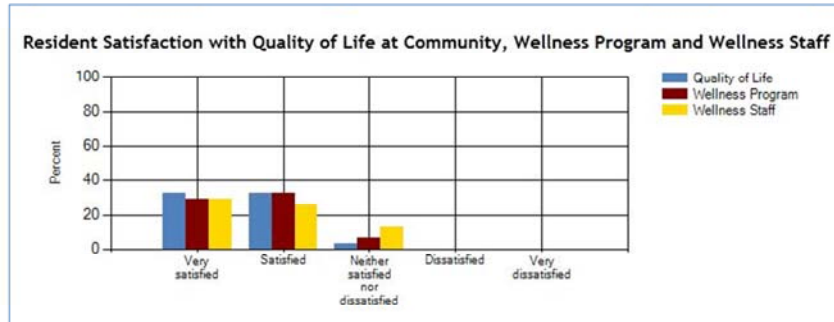


Business objectives

- Referrals
- Satisfaction with community
- Increase LOS
- Occupancy

- Willingness to recommend community
- More likely to stay in community
- Happier more engaged residents

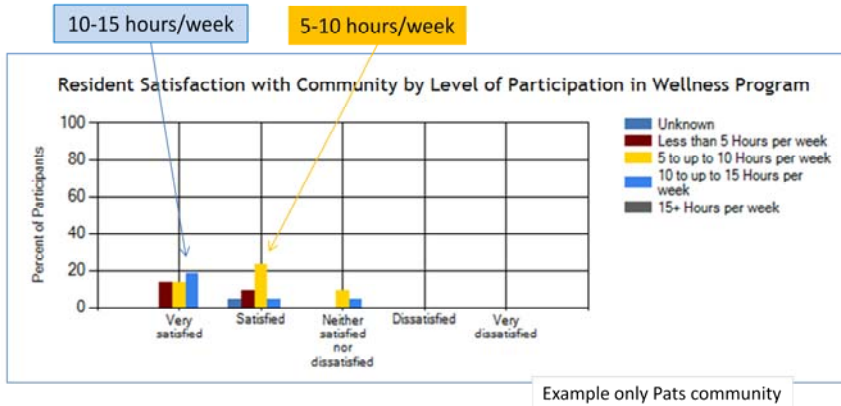
Resident satisfaction



Example only Pats community

This chart is provided by ICAA/ProMatura online and in a PDF.

Do hours affect satisfaction?



Satisfaction by hours can help explain overall ratings of satisfaction from other areas.

Wylde, M. A., Smith, E., Schless, D., & Bernstecker, R. (2009). Satisfied Residents Won't Recommend Your Community, But Very Satisfied Residents Will. *Seniors Housing & Care Journal*, 17(1).

Draw the line to mission and margin

Participation



Business objectives

- Most independent possible
- Satisfaction with community
- Increase LOS

- Engagement in community life
- Reduce risk of some health issues (eg, heart disease)
- Social interaction, creative interaction
- Cognitive/intellectual maintenance
- Satisfaction with community

Participation

July

Activities sorted by participants since 1 month ago

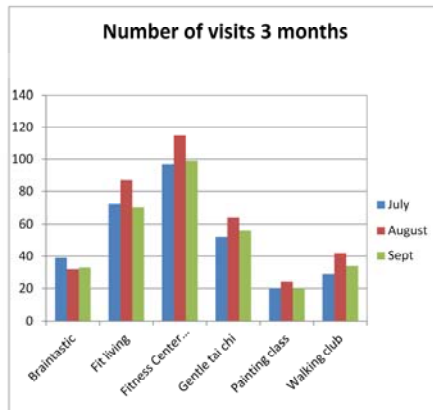
Activity	Attendances	Participants
Fitness Center visits	97	11
Bottom up yoga	93	10
Braintastic	39	10
Line dancing club	29	10
Gentle tai chi	52	9
Walking club	29	9
Water volleyball	20	9
Whole person exercise	79	9
Fit living	72	8
Water weights	79	8
Arthritis water program	45	7
Painting class	20	6

Example only Pats community

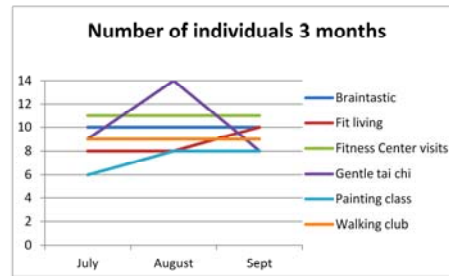
Attendances means the number of people in that class/activity.

Participants is the number of individuals who attended in the prior month.

Custom reports



Example only Pats community



In prior 30 days, number of attendances "visits" and number of individuals.

This is Pat's Community, so residents are fictional. The report on participation was downloaded in Excel and these charts were created to look at classes of particular interest.

Why is the Fitness Center Visit so high and the painting class so low? The Visits chart shows this; the manager know that the fitness center is open all day 5 days/week. The painting class is offered once a week.

The other chart shows the number of individuals who attended. Both the Painting Class and Fitness Center show a steady number of individuals. In fact, the number of people painting increased to 8 while the number of people using the fitness center held steady at 11.

The greater number of Fitness Center visits is explained by the fact it's available for long blocks of time 5 days a week while painting class is held only once a week. If you had looked only at participation numbers and not the number of individuals, it would be easy to conclude that painting isn't a desired activity.



“In a constrained budget environment, you have to show results.”

Ursula Bauer, Ph.D., M.P.H.
Director, NCCDPHP, CDC
CDC’s National Center for Chronic Disease Prevention and Health Promotion



value

Balance investment with return

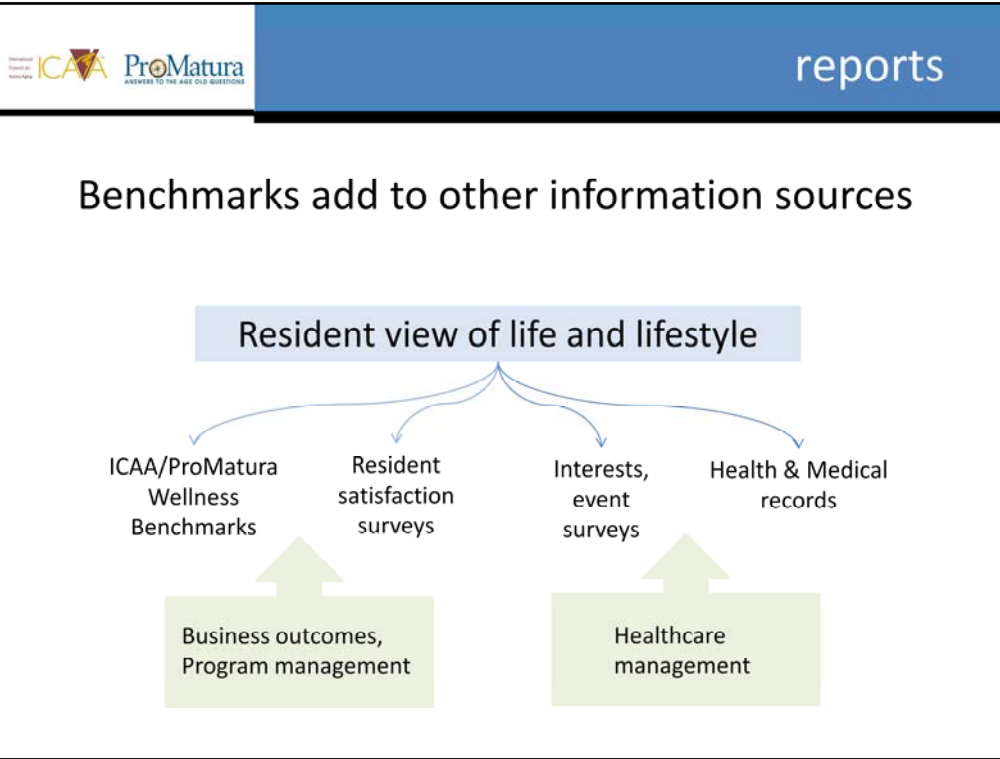
Free entry, valuable returns

<p>Your investment</p> <ul style="list-style-type: none"> ■ Staff time ■ Data collection ■ Data entry ■ Long-term commitment 	<p>Your return</p> <ul style="list-style-type: none"> ■ Management reports ■ Secure system ■ Database management ■ Training and support ■ Long-term commitment
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Why free entry? ICAA and ProMatura made a strategic decision to enable free entry into the system to encourage retirement communities to collect and enter data. The more communities contributing information, the more valuable the benchmarks. In recognition of the administration required to collect information according to ICAA/ProMatura specifications, each property retrieves it's own management tools. There is a small fee for the national benchmark reports for communities currently contributing data; there is a higher fee for communities that do not contribute information.

Your role: Enter (1) demographic and descriptive information about each property, (2) a list of residents and (3) a list of fitness/activities/recreation activities to track.
Enter individual resident's opinions from a survey.

ICAA/ProMatura role: Maintain secure database housing all input.
Create analytics to produce reports that give back the data entry to each property and compare and contrast the data for analysis.
Aggregate the data from all communities, anonymously, to produce national benchmarks and identify the best in class.
Enroll communities, provide staff training and support, maintain the system, prepare annual reports.



The ICAA/ProMatura benchmarks do not replace others that focus on resident interests or health, but rather fit beside these to look at the business/program side. The purpose of the benchmarks is different than the purpose of other surveys. By using two (or more surveys), likely with some but not a lot of overlap, organizations get a very complete picture.

Strengths of the ICAA/ProMatura system

- Links hours of participation to LOS, resident satisfaction, etc.
- System does the calculations
- Property owns data, can download and manipulate as desired
- Noncompetitive with other systems
- Easy to use
- Web-based so no IT infrastructure required other than Internet access
- Low cost, minimal barrier to entry
- User-generated reports
- Compare residents who participate to non-participants
- Confidential, secure
- Scalable
- ProMatura has upgraded and fixed as needed to enhance usability and functionality



Toolkit


- Step-by Step instructions
- Printable versions of information, surveys and forms for staff and residents
- Worksheets in Word and Excel

Tutorials

- Webinar recordings on getting started and using the reports
- Examples of reports in PDF and Excel
- Excel workbook example of downloading and composing individual charts and graphs

Support


- Newsletter of tips and techniques emailed to Administrators
- Telephone and email answers to questions



ICAA ProMatura
ANSWERS TO THE AGE-OLD QUESTIONS

How to get started

- View the “getting started” webinars.
- Visit ICAA for more information:
www.icaa.cc/Management/benchmark_s.htm
- Email patryan@icaa.cc or info@icaa.cc for a personalized tour and consultation.
- Introduce the ICAA/ProMatura Wellness Benchmarks to management and staff.



To get started, you can contact Pat Ryan at patryan@icaa.cc for a tour of a sample community.

Visit the ICAA website and choose the benchmarks link. On this page you'll find videos, information sheets and the Step-by-Step Guides.

The ICAA website is open 24 hours a day.



“As people are living longer and attitudes are changing about aging in place and quality of life, wellness centers are becoming the core of senior living communities—whether in new developments or on renovated campuses.”

Senior Living Business
Irving Levin Associates, Dec-Jan 2011

THANK YOU

ICAA/ProMatura Wellness Benchmarks

Metrics for the senior living industry

Visit ICAA

www.icaa.cc/Management/benchmarks.htm

Pat Ryan

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