

Now that you are entering data into the ICAA/ProMatura Wellness Benchmarks system, the reports are the key to pulling information out to improve the quality of your program, and improve efficiencies.

This presentation will cover:

- Where to find the reports
- When to save reports
- What the reports contain
- What to do with the information
- Customizing your own reports

It's assumed you already know about the purpose of the system, how it works, how to enroll and start using the software. If you need more information on these topics, join one of the other webinars outlining the ICAA/ProMatura Wellness Benchmarks and visit ICAA's website: <http://www.icaa.cc/Management/benchmarks.htm>

For more details, contact Pat Ryan at [patryan@icaa.cc](mailto:patryan@icaa.cc)



**“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.

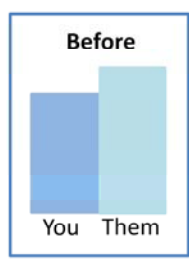
“Satisfaction with the overall community was 78% among wellness program users.

“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.”

-Vice president, communities inputting residents/activities since February 2011

## Benchmarking has 2 goals

1. Improve quality
2. Improve processes



Uses numbers to report outcomes

Compare your results to others, especially best in class

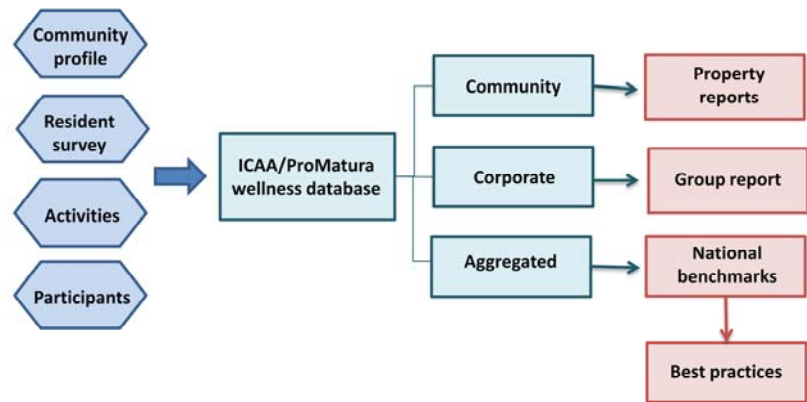
Compare results over time



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.

### 3 Levels of reports



The information that enables you to benchmark are produced from the information you have been entering into the system. You have spent time and effort collecting and inputting data. The reports are your return.

ICAA/ProMatura will prepare two national benchmarks reports. One will aggregate the information in the Community Survey. The second will aggregate the data of communities tracking participants and resident satisfaction surveys.



ICAA/ProMatura Wellness Benchmarks

User-generated	ICAA/ProMatura-generated
<div style="border: 1px solid black; padding: 5px; text-align: center;">           On demand            Free            Per property         </div> <ul style="list-style-type: none"> <li>▪ Community snapshot</li> <li>▪ Community detail</li> <li>▪ Participant review</li> <li>▪ Resident log</li> <li>▪ Activities log</li> </ul>	<div style="border: 1px solid black; padding: 5px; text-align: center;">           Annual            Nominal fee if provide data            Fee if don't provide data         </div> <ul style="list-style-type: none"> <li>▪ Industry preliminary benchmarks</li> <li>▪ Industry benchmarks</li> <li>▪ Community trend report after 2 years</li> <li>▪ Corporate (private benchmarking group)</li> </ul>

The user-generated reports are available immediately, online, and can be saved/printed to PDF or Excel, and show the prior 30 days. Save these to track changes on a monthly or quarterly basis.

The reports return to the community most of the data that has been entered into the system.

The analytics featured in the reports link together the property description, activities and resident survey.

The national benchmarking reports are produced annually by ICAA and ProMatura. These show the aggregated data of all the communities in the system.

Some metrics will take time to mature. For example, answering key questions of whether participation in wellness lengthens a resident's time in the most independent level of living or impacts average length of stay. The answers won't be known until about 5 years of contributing data.

### The better the data, the better the reports



Good



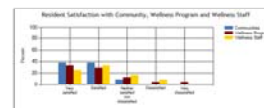
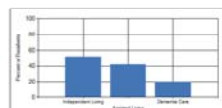
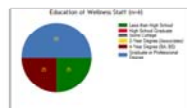
Not So Good

The accuracy of the reports depends on the accuracy of the information in the system. Incorrect information or a data entry error can result in “funny looking” reports that don’t make sense.

For example, a community with independent and assisted levels of care enrolls as an “active adult” community, and then enters the number of residents in independent and assisted levels of living. The community markets itself as a home for active adults, but it is not a real estate development with homes for 55+ adults with no supportive services, which is how real estate (and ProMatura/ICAA) define such a community. The result is a report with lots of missing and odd data.



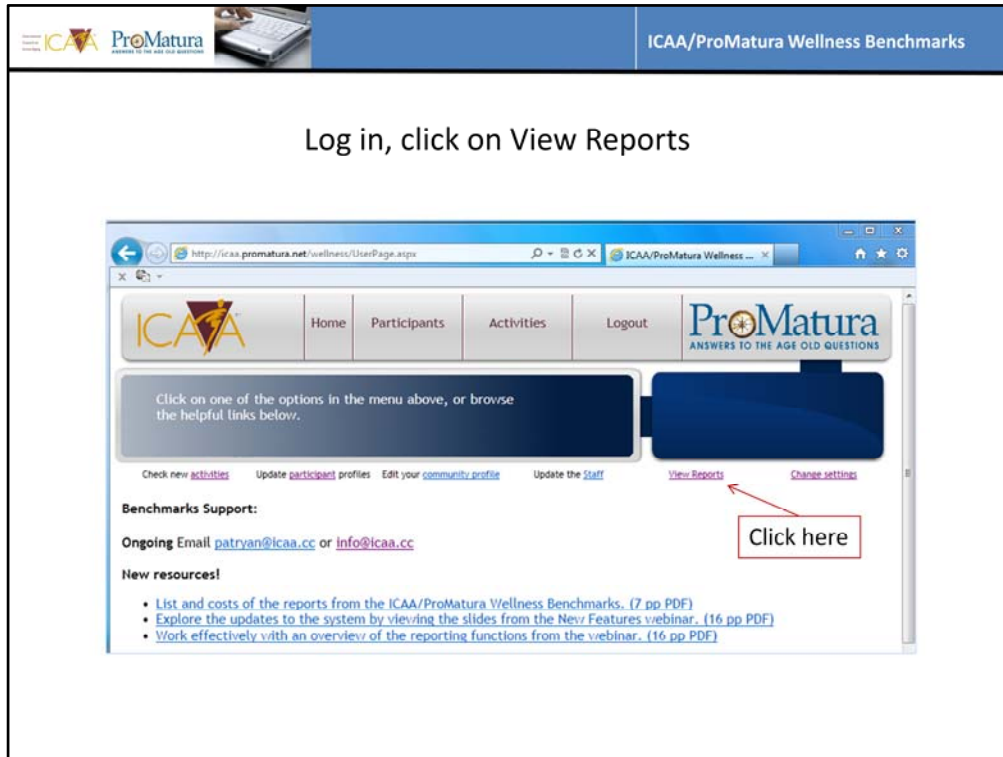
## Reports and analytics



As a reminder,

“wellness” is a general term that applies to quality of life activities. Your community may have a different name or include one or more of the traditional areas of fitness, activities, resident life, recreation or therapy.

“activities” is a general term for what you offer, which could include fitness, intellectual stimulation (brain exercises) health promotion presentations, chronic disease management, social and arts activities. Your community may have specific department names, but for the benchmarks think of “activities” as a general term.



Only the Administrator password can access the reports.



The screenshot displays the ICAA/ProMatura Wellness Benchmarks interface. At the top, there is a header with the ICAA and ProMatura logos on the left and the text "ICAA/ProMatura Wellness Benchmarks" on the right. Below the header, the main content area is titled "Community Snapshot, Community Detail, Participant Review".

The interface includes a navigation menu with the following items: Home, Participants, Activities, Logout, and the ProMatura logo with the tagline "ANSWERS TO THE AGE OLD QUESTIONS".

Below the navigation menu, a message states: "These reports are currently available to you." This is followed by a list of reports:

- [Community Snapshot](#): Free report of the information entered in the community profile
- [Community Report](#): Free report showing activities, staffing, utilization, and satisfaction; includes tables and charts and is available as a PDF
- [Participant Review](#): Free interactive look at participants and their records

The reports shown here are examples from a sample community. None of the residents or classes are real. The classes do reflect those that are typically offered and specific activities communities have shared with ICAA.

The activities and attendances in this example community are maintained just as yours are, with resident input and attendance planned per the individual, not randomly assigned.



## User-generated, on-demand

- Free to enrolled communities
- Real time, accurate on day and at time report is created
- Dynamic: update one activity or submit single resident survey, and the results will change
- Average of prior month
- No history



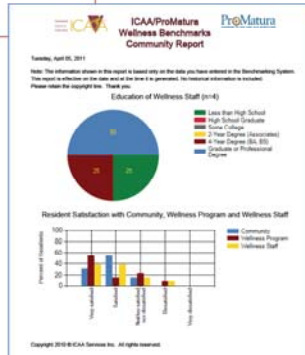
- 7 days** Update the classes once a week
- 30 days** Download reports in PDF or Excel; online results show 30 days prior
- 90 days** Every few months you may want to analyze your 30-day downloads
- 365 days** Update the Community profile; administer Resident survey

Because the reports are dynamic and reflect the real-time information in the system, keeping the system up to date means you have more accurate reports.

There is no history beyond 30 days, so set a specific date each month and download.

## Save to PDF or Excel

PDF for immediate presentation to supervisor, board, residents, colleagues



Excel to customize reports, store data, compare changes over time

Education of Wellness Staff (n=4)	Percent of
Less than High School	0
High School Graduate	0
Some College	0
2-Year Degree (Associates)	0
4-Year Degree (BA, BS)	25
Graduate or Professional Degree	50

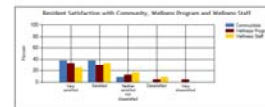
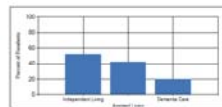
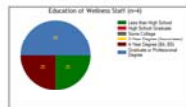
Category	Rating	Percent of Participants
Community Satisfaction	Very satisfied	50
Community Satisfaction	Very dissatisfied	0
Community Satisfaction	Satisfied	37.5
Community Satisfaction	Neither satisfied nor dis	12.5
Community Satisfaction	Dissatisfied	0
Wellness Program	Very satisfied	37.5
Wellness Program	Very dissatisfied	4.1
Wellness Program	Satisfied	37.5
Wellness Program	Neither satisfied nor dis	12.5
Wellness Program	Dissatisfied	8.3
Wellness Staff	Very satisfied	29.1
Wellness Staff	Very dissatisfied	0
Wellness Staff	Satisfied	37.5
Wellness Staff	Neither satisfied nor dis	20.8
Wellness Staff	Dissatisfied	12.5

The print-friendly PDFs give you an immediate dashboard of program results. Be aware the reports show only the past 30 days. As more users enter information into the system, these reports will evolve, too, as relationships become apparent.



## Community Snapshot Report

- Describes total community
- Demographics are key to analytics (cross tabs and relationships)
- Baseline data for trends
- Creates one national benchmarks report



A wellness program is part of the total community; it is not isolated. By describing the facilities and services the community offers, you can see how wellness sits in the context of community life.

**Community snapshot report, online**

ICAA Home Participants Activities Logout ProMatura  
ANSWERS TO THE AGE OLD QUESTIONS

These statistics are based on the data you have entered.

Community Info Program Areas Program Dimensions Program Activities Printer-Friendly Excel/CSV file

Community Info	Program Areas	Program Dimensions	Program Activities	Printer-Friendly	Excel/CSV file
<p><b>Name:</b> Pats Community</p> <p><b>Address:</b> Community Ave</p> <p><b>City:</b> San Diego</p> <p><b>State:</b> CA</p> <p><b>Zip:</b> 92103</p> <p><b>Phone:</b> 6195011942</p> <p><b>Type of property:</b> simple community</p> <p><b>Management:</b> Managed by owners</p> <p><b>Service Type:</b> Independent Living</p> <p><b>Units:</b> 123</p> <p><b>Occupied Units:</b> 110</p> <p><b>Beds:</b></p> <p><b>Occupied Beds:</b></p> <p><b>Residents:</b> 203</p> <p><b>Participants:</b> 67</p>	<p><b>Area:</b> Area dedicated to wellness activities 50% or more of the time Yes</p> <p><b>Wellness center in a stand-alone or attached building:</b> No</p> <p><b>Fitness center (with fitness equipment):</b> Yes</p> <p><b>Classrooms or studios for exercise, dance, Tai Chi, yoga, etc.:</b> Yes</p> <p><b>General purpose room:</b> No</p> <p><b>Sports courts (tennis, golf course, basketball, volleyball, etc.):</b> No</p> <p><b>Games courts (billiard, pool, shuffleboard, croquet, putting green, etc.):</b> Yes</p> <p><b>Card or game room:</b> Yes</p> <p><b>Crafts room:</b> No</p> <p><b>Art studio:</b> No</p> <p><b>Full size swimming pool:</b> No</p> <p><b>Smaller pool used for various types of exercise:</b> No</p> <p><b>Lap pool:</b> Yes</p> <p><b>Library:</b> Yes</p> <p><b>Gardening area:</b> Yes</p> <p><b>Walking trails or paths:</b> Yes</p> <p><b>Outdoor barbecue area:</b> No</p> <p><b>Chapel:</b> Yes</p> <p><b>Woodworking or hobby shop:</b> Yes</p> <p><b>Business center or computer room:</b> Yes</p> <p><b>Music studio:</b></p>	<p><b>Provided:</b></p>			

Downloads are here

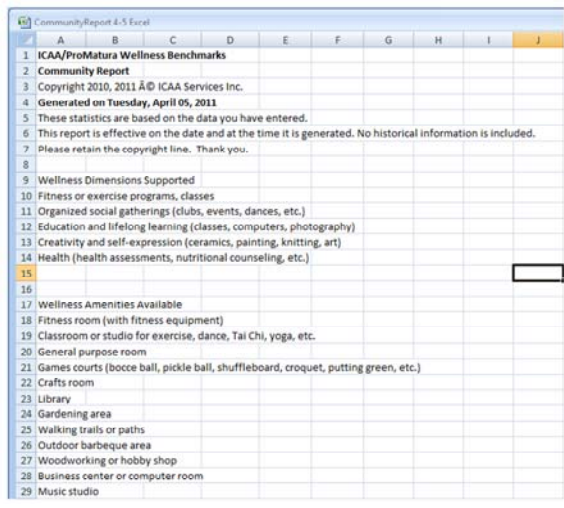
Once a year, update the Community survey. Otherwise your reports will show empty spaces. In the top blue box, a notice will appear telling you it is time to update.

## Community snapshot report

### The report in Excel

Less dynamic than Community detail report

Update once a year, or anytime something changes



	A	B	C	D	E	F	G	H	I	J
1	ICAA/ProMatura Wellness Benchmarks									
2	Community Report									
3	Copyright 2010, 2011 © ICAA Services Inc.									
4	Generated on Tuesday, April 05, 2011									
5	These statistics are based on the data you have entered.									
6	This report is effective on the date and at the time it is generated. No historical information is included.									
7	Please retain the copyright line. Thank you.									
8										
9	Wellness Dimensions Supported									
10	Fitness or exercise programs, classes									
11	Organized social gatherings (clubs, events, dances, etc.)									
12	Education and lifelong learning (classes, computers, photography)									
13	Creativity and self-expression (ceramics, painting, knitting, art)									
14	Health (health assessments, nutritional counseling, etc.)									
15										
16										
17	Wellness Amenities Available									
18	Fitness room (with fitness equipment)									
19	Classroom or studio for exercise, dance, Tai Chi, yoga, etc.									
20	General purpose room									
21	Games courts (boce ball, pickle ball, shuffleboard, croquet, putting green, etc.)									
22	Crafts room									
23	Library									
24	Gardening area									
25	Walking trails or paths									
26	Outdoor barbeque area									
27	Woodworking or hobby shop									
28	Business center or computer room									
29	Music studio									

The report is date stamped so you know when it was generated.



## Community snapshot report

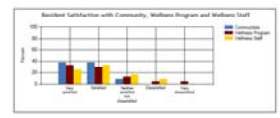
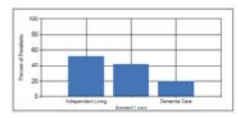
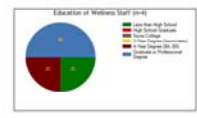
Use this report to think about the big picture

- How does your community compare in terms of bricks and mortar, programs, services and staffing in relation to others?
- Do the available facilities influence participation? If there are many facilities/programs but few residents participate, why is that? Programs? Staffing?
- What about staff? Is there appropriate staff numbers? Would their years experience or education influence residents' satisfaction?
- What about tomorrow, and 5 years from today?



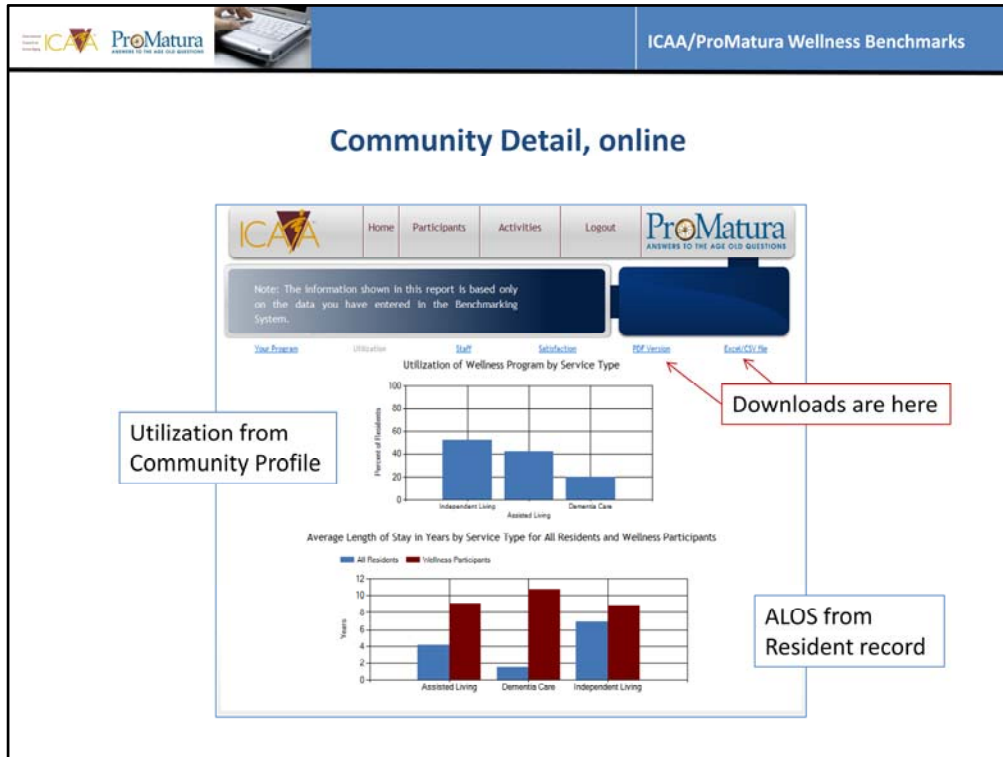
# Community Detail Report

- Chart program utilization, satisfaction
- Compare participants to nonparticipants
- Resident perceptions
- Base for second national benchmarks report



The Community Detail Report gives you information for program management.

ICAA/ProMatura provides analytics of some of the data based on information in the Community Profile and the Activities/Resident participation stats and the Resident Survey.



This report is dynamic, a number of items change each time you update the Activities or Residents. This chart is online and can be saved to PDF. The data table appears in the Excel download.

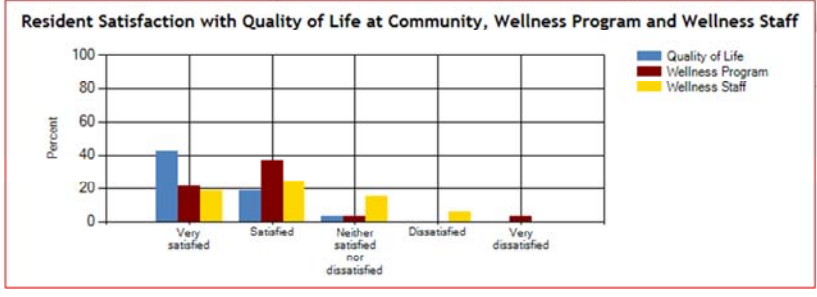
The top chart on Utilization uses data from the Community Profile; the bottom chart on ALOS uses demographics in the Resident's record. This is why the month/year of move-in is important to have.

With an Excel download, you can compare changes from month-to-month or any time point you choose.

### Community Detail

## Resident perceptions

Question	Answer	Partic./pents	Nonpartic./pents
What best describes the level of services you currently receive?	Active Adult	1	0
	Independent Living	18	1
	Assisted Living	8	3
	Demantia Care	1	1
How satisfied are you with your quality of life here at the community?	Very dissatisfied	0	0
	Dissatisfied	0	1
	Neither satisfied nor dissatisfied	1	0
	Satisfied	7	3
How satisfied are you with your wellness program?	Very satisfied	20	1
	Very dissatisfied	1	0
	Dissatisfied	1	1
	Neither satisfied nor dissatisfied	2	4
How satisfied are you with the wellness program staff?	Satisfied	15	0
	Very satisfied	9	0
	Very dissatisfied	0	0
	Dissatisfied	2	0
	Neither satisfied nor dissatisfied	11	4
	Satisfied	8	1

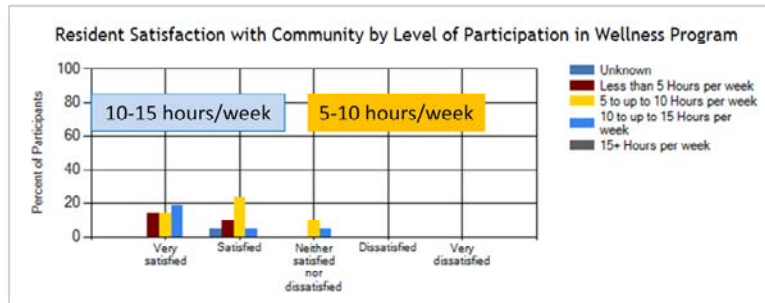


This is where you'll find the results of the Resident Satisfaction Survey. The table version gives you the N or number of responses. That way you can convert to percentages based on the totals you choose. The table provides total responses by level of living, with columns for participants and nonparticipants.

The online chart shows the results as a percentage for three of the questions on the resident questionnaire, making it easy to compare.

## Community Detail

### Participation & satisfaction



From Resident Survey and Activities tracking



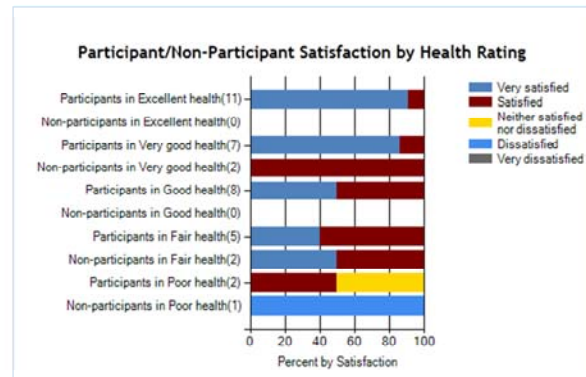
## How the hours are calculated



- For each resident, hours per week are summed and placed over that person's total hours in prior month.
- This gives an average per person without penalizing the person if s/he misses a class in a given week or an Activity isn't offered.
- Individual hour averages are aggregated to arrive at the total of all participants, shown on the chart.

### Community Detail

Compare participants to non-participants



This report is also where you'll find the survey responses of non-participants if you are administering surveys to them.

This chart compares residents' self-rated health with their satisfaction levels.

## Community Detail Report

Use this report to think about the program

- Staff & committee meetings
- Annual budget
- Program goals
- Staff goals

- Should an activity be discontinued or changed because of low participation?
- If the wellness program isn't increasing resident's satisfaction with the entire community, what should change?
- If a change in staffing or activities, what are the outcomes?
- Would more resident involvement in programming impact participation or satisfaction?

The purposes of using the ICAA/Matura Wellness Benchmarks are quality improvement and program efficiencies. This report really helps you in those two areas.

## Evaluate participation

**Attendances** = number of visits over past month

Is that because the class/activity is:

- offered more frequently?  
 e.g., 5 days/week v.  
 once/month
- more popular?
- led by a well-liked instructor/leader?
- marketed a lot, or not at all?
- fun and interesting?

**Participants** = number of individuals who participated in prior month

Activities sorted by participants since 1 month ago

Activity	Attendances	Participants
Fitness Center visits	86	11
Bottom up yoga	75	10
Braintastic	39	10
Line dancing club	29	10
Gentle tai chi	52	9
Water volleyball	20	9
Whole person exercise	73	9
Fit living	64	8
Walking club	17	8
Water weights	66	8
Arthritis water program	45	7
Painting class	15	6
Express yourself	18	5
Quilting club	5	5
Mind challenge	0	0

There were 86 visits to the Fitness Center over 30 days. The Fitness Center is open 5 days/week, so really there were 86 visits over 22 days (30 minus 4 weekends). That average out to 3.9 visits (let's call it 4 visits) a day.

There was an average of 4 visits a day, by 11 individuals during the whole month. That's not enough use of this facility. What needs to change? Hours? Staffing? Equipment? Seminars in the fitness center? Offer a few free sessions of personal training so residents know how to use the equipment? Bring in a health educator? Start a referral campaign?

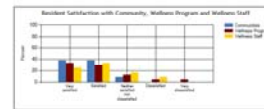
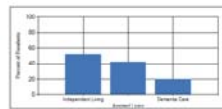
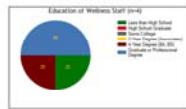
You know your people. Use this information to stimulation discussion and action.





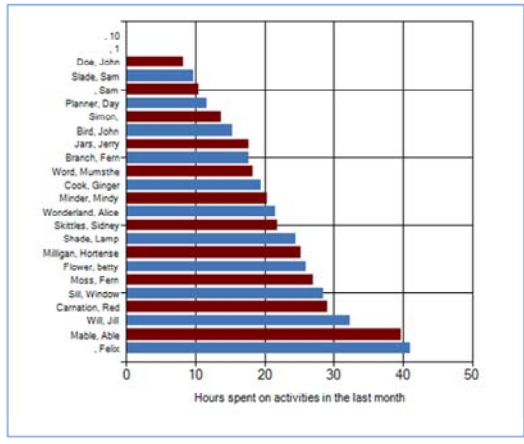
## Participant Review

- Chart participation hours
- Base for individual coaching



### Participant Review



- How many hours each individual spent in Activities that are tracked
- Average of prior month
- To save this chart, use Print Screen or Snip Tool. This chart does not appear in a PDF or Excel report.



This chart is very dynamic, it will be updated as you update participation in activities.

It is the only chart that cannot be downloaded as is. To save, use the Print Screen on your keyboard, or Snip tool or whatever tool your computer system has to capture a web page.

Paste it into a Word document, PowerPoint slide or Excel sheet. Be sure to add a date.

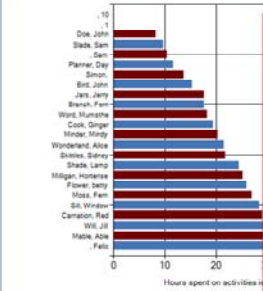
ICAA/ProMatura Wellness Benchmarks

## Participant Review

- Click on a name, and a record of that person's attendance pops up.
- You can save the individual's report to Excel.

The graph below shows each participant's time spent in activities in the previous month.

Click on a participant's name to go to a detailed report.



Whole person exercise	3/26/2011 12:00:00 AM	Attended
Water weights	3/25/2011 12:00:00 AM	Did not attend
Quilting club	3/25/2011 12:00:00 AM	Did not attend
Bottom up yoga	3/25/2011 12:00:00 AM	Attended
Arthritis water program	3/24/2011 12:00:00 AM	Did not attend
Gentle tai chi	3/24/2011 12:00:00 AM	Did not attend
Fitness Center visits	3/24/2011 12:00:00 AM	Did not attend
Express yourself	3/24/2011 12:00:00 AM	Attended
Fit living	3/24/2011 12:00:00 AM	Did not attend
Braintastic	3/24/2011 12:00:00 AM	Attended
Whole person exercise	3/24/2011 12:00:00 AM	Attended
Bottom up yoga	3/23/2011 12:00:00 AM	Attended
All about health	3/23/2011 12:00:00 AM	Attended
Water volleyball	3/23/2011 12:00:00 AM	Did not attend
Water weights	3/23/2011 12:00:00 AM	Did not attend
Fitness Center visits	3/23/2011 12:00:00 AM	Did not attend

At a glance, you can identify the most active residents and see who needs extra encouragement.

Because you can see which activities a person attended in the past 30 days, their choices may guide you in making recommendations or explaining why, for example, a person is not feeling progress in the exercise program.

ICAA/ProMatura Wellness Benchmarks,  
Using Reports July 2012

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## Participant Review

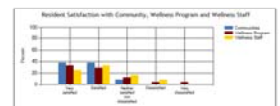
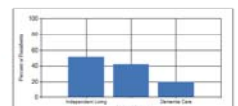
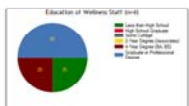
### Use this report to focus on individuals

- Are the most frequent participants candidates for a wellness committee, or volunteers for special events like Active Aging Week?
- Would a few of these residents form an outreach team to talk up the wellness program, or write articles for the community newspaper on why they participate?
- If a person moves from a higher number of hours to far fewer, is it because of illness, or vacation or another reason?
- If a resident says they want to drop out because they aren't seeing results, will showing their attendances indicate it's because of program choices that won't help them reach their goals?



## Customize Reports

Download the zip folder with examples of using Excel to customize reports.



For examples of using Excel to create reports, email [patryan@icaa.cc](mailto:patryan@icaa.cc).

# Sample reports folder

**Working with Excel to track changes over time**

These examples are based on information from the Community Report, which includes the attendances in activities you track, along with results of the resident satisfaction survey. The number change whenever you enter new information. This report includes input in the prior 30 days, no historical information is included.

- Once a month, download the Excel/CVS version of the Community Report
- Choose the items you wish to track. Not everything in the report will change from month to month. These items, change only when you make revisions: Activities list, responses, and resident satisfaction survey.

These items are dynamic and change constantly as you update them:

- Number of attendances (visits) to each activity
- Number of individual participants

- Save each monthly download to a new tab in your worksheet. You do not have to do this, but it is recommended.
- Copy the section you wish to compare, and paste into into a separate working tab. In this example, we compare the number of attendances and participants for two different months.
- Add the date to the top of the columns you are comparing.
- Make lists or charts to study the information. An example is on the Tracking tab.

Be sure to separate Attendance and Participants

A. The original list is in order of "most"			B. Sort Activities into alphabetical order.		
	1-Oct	1-Oct		1-Oct	1-Oct
Activity	Attendans	Participants	Activity	Attendans	Participants
Bottom up yoga	96	11	All about health	9	9
Fitness Center visits	99	11	Arthritis water progr	45	8

The folder contains examples of downloads, organizing these, and choose items to turn into customer reports. A few tips are included.

All these operations use the basic Excel tools, and the Excel charts. While these examples use Excel the files can be downloaded and organized in similar spreadsheet software.



## Track trends

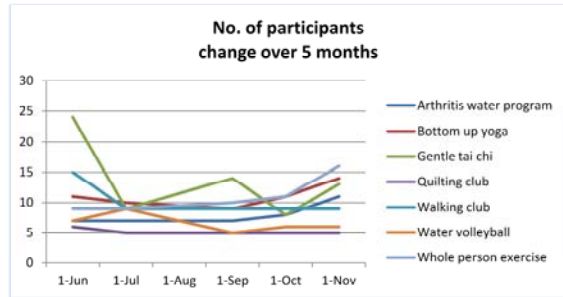
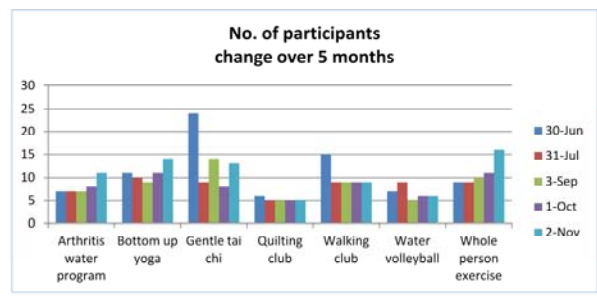
Charting all the classes makes a very large and overwhelming chart. Select activities that seem to have the most variation.

	30-Jun	31-Jul	3-Sep	1-Oct	2-Nov
Activity	Participan	Participan	Participan	Participan	Participants
All about health	0			9	6
Arthritis water progr	7	7	7	8	11
Bottom up yoga	11	10	9	11	14
Braintastic	10	10	10	10	9
Express yourself	6	5	5	5	6
Fit living	9	8	8	10	9
Fitness Center visits	12	11	11	11	12
Gentle tai chi	24	9	14	8	13
Line dancing class	4			4	0
Line dancing club	9	10	9	9	9
Managing diabetes	6			6	5
Mind challenge	5	0	6	7	7
Monthly meal w che	11		11	11	0
Painting class	5	6	8	8	7
Quilting club	6	5	5	5	5
Walking club	15	9	9	9	9
Water volleyball	7	9	5	6	6
Water weights	9	8	7	8	7
Whole person exerc	9	9	10	11	16

The examples used the Excel functions of:

- Sorting
- Insert charts

The same information is shown on 2 different chart styles. Each style shows the information in a different way.



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. The same numbers are used in both charts.

In the top chart, it’s easier to show changes in each class. In the bottom longitudinal charts, it’s easier to see participation over time.

What was attendance in the Tai Chi class so high in June and then a big drop? Was it that there was a special event in June so a lot of people tried it, then dropped out. Was it related to the time it’s offered, or the leader, or the location? You know your community, this analysis helps you ask the questions.



## Custom Reports

### Use custom reports for trends and analysis

- Compare results of resident satisfaction surveys from time to time, or once a year
- Analyze participation levels and resident satisfaction
- Answer specific questions, such as resident satisfaction compared to types of programs or staffing levels
- Answer questions asked by senior management if not on the provided reports
- Support budget requests for staffing, supplies or equipment

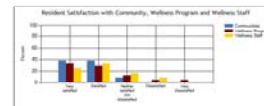
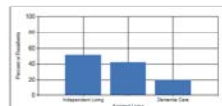
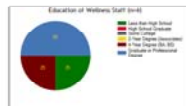
For communities that contribute data, after two years, ICAA/ProMatura will produce a “community trend report” that compares one year to a prior year. ICAA/ProMatura will produce that report once a year.

To make comparisons at the time you need them, use the reports you have downloaded every month.




## Resident and Activities Logs


- List of residents in the system and their status
- List of activities in the system
- Base for custom reports, attendance sheets



## Participant Log



Home | Participants | Activities | Logout



Click below to add a participant or edit a participant's information, or click on one of the options in the menu above.

Hover the mouse over participation notes for explanations.

[Click here to add a participant.](#) [Click here for a listing of the shown participants](#)

Currently showing only the participants that: have ever been entered

Participant (click the name to edit)	Participant's Status	Participant Notes
<a href="#">.1</a>	Participating	
<a href="#">.18</a>	Participating	
<a href="#">. Felix</a>	Participating	Qualifies; <a href="#">Resident survey required</a>
<a href="#">. Sam</a>	Participating	Qualifies;
<a href="#">Bird, John</a>	Participating	Qualifies;
<a href="#">Donasparto, Napoleon</a>	Participates, but only surveys are tracked	Can login;
<a href="#">Branch, Fern</a>	Participating	Can login; Qualifies;
<a href="#">Carnation, Rej</a>	Participating	Qualifies;
<a href="#">Cook, Ginger</a>	Participating	Qualifies;
<a href="#">Crockett, Davey</a>	Does not participate but takes surveys	Qualifies;
<a href="#">Doe, John</a>	Participating	Can login; Qualifies;
<a href="#">Flower, betty</a>	Participating	Qualifies; <a href="#">Resident survey required</a>
<a href="#">Flower, Bing</a>	Unable to participate	
<a href="#">Flowers, Sylvia</a>	Participates, but only surveys are tracked	Can login; <a href="#">Resident survey required</a>
<a href="#">Jara, Jerry</a>	Participating	Can login; Qualifies;
<a href="#">Hablo, Able</a>	Participating	Can login; Qualifies;
<a href="#">William, Hortense</a>	Participating	Qualifies;
<a href="#">Winder, Minda</a>	Participating	Qualifies; <a href="#">Resident survey required</a>

### Participant Log

Keep current on resident's status

Click here to add a participant! [Click here for a listing of the shown participants](#)

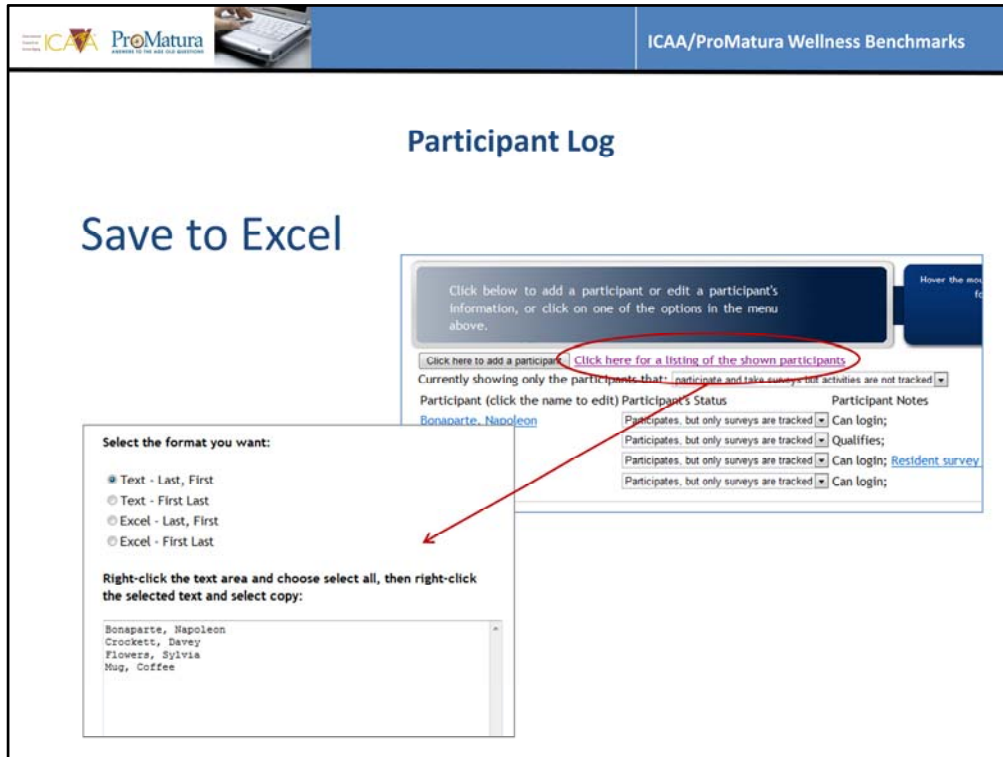
Currently showing only the participants that:

Participant (click the name to edit) 

<a href="#">.1</a>	Participati	are participating	
<a href="#">.10</a>	Participati	have ever been entered	
<a href="#">.Felix</a>	Participati	are participating	
<a href="#">.Sam</a>	Participati	participate and take surveys but activities are not tracked	
<a href="#">Bird, John</a>	Participati	do not participate but take surveys	
<a href="#">Branch, Fern</a>	Participati	are temporarily in therapy	
<a href="#">Carnation, Red</a>	Participati	are unable to participate	
<a href="#">Cook, Ginger</a>	Participati	have moved away	
<a href="#">Doe, John</a>	Participati	have passed away	
	Participati	are errors or duplicates	
	Participati	choose not to participate	
	Participating		Can login; Qualifies;
	Participating		Qualifies;
	Participating		Qualifies;
	Participating		Can login; Qualifies;

The log defaults to residents who are participating to keep the list manageable (these are the only residents who appear when you track attendance in Activities).

When a resident's lifestyle changes, change the category. Otherwise, your statistics won't be accurate. Click on the small arrow for the dropdown menu.



When you want to save the resident log to Excel, first display the category you want.

Go to “Currently showing ....” and click the down arrow to show the categories. Wait till the list populates.

This example show “Participates but only surveys are tracked” meaning the resident is engaging in wellness, but you do not know what that she or he is doing.

Second, go to “Click here for a listing of the shown participants.” The small screen will pop up. You can copy and paste these names into Excel or Word.

If you want to save other categories, then go back to “Currently showing ....” Wait till the list populates.

Go to “Click here for a listing of the shown participants.” The small screen will pop up.

Continue. This takes less time than it seems.

### Participant Log

	A	B	C	D	E	F	G	H	I	J
1	Ever entered			Currently participating		3/4/2011		4/26/2011		
2		Felix		1		Felix		1		1
3		Sam		2		Sam		2		10
4	Bird	John		3	Bird	John		3		Felix
5	Bonaparte	Napoleon		4	Branch	Fern				Sam
6	Branch	Fern		5	Carnation	Red		Bird		John
7	Carnation	Red		6	Cook	Ginger		Branch		Fern
8	Cook	Ginger		7	Doe	John		Carnation		Red
9	Crockett	Davey		8	Flower	betty		Cook		Ginger
10	Doe	John		9	Jars	Jerry		Doe		John
11	Flower	betty		10	Mable	Able		Flower		b
12	Flower	Bing		11	Milligan	Hortense		Jars		J
13	Flowers	Sylvia		12	Minder	Mindy		Mable		A
14	Jars	Jerry		13	Moss	Fern		Milligan		H
15	Mable	Able		14	Planner	Day		Minder		M
16	Milligan	Hortense		15	Shade	Lamp		Moss		F
17	Minder	Mindy		16	Sill	Window		Planner		D
18	Moss	Fern		17	Simon			Shade		L
19	Mug	Coffee		18	Skittles	Sidney		Sill		W
20	Planner	Day		19	Slade	Sam		Simon		
21	Ranger	Les		20	Will	Jill		Skittles		Sidney
22	Screen	Silk		21	Wonderla	Alice		Slade		Sam
23	Shade	Lamp		22	Word	Mumsthe		Will		Jill
24	Sidney	Cid						Wonderlar		Alice
25	Sill	Window			Unable to participate			Word		Mumsthe
26	Simon			23	Flower	Bing				

Add the date

Use the automatic numbering function in Excel to count how many residents in each category.

This example shows how the resident lists were saved to an Excel workbook. You can compare changes over time by placing names in each category next to each other.

### Participant Log

Attendance sheets

PC Activities to track [Compatibility Mode]		A	B	C	D	E	F	G	H
1	<b>FIT LIVING</b>								
2	Week of _____								<b>DAYS OF WEEK</b>
3					MONDAY	WEDNESDAY	FRIDAY	SATURDAY	
4									
5			1						
6			10						
7	Felix								
8	Sam								
9	Bird John								
10	Branch Fern								
11	Carnation Red								
12	Cook Ginger								
13	Doe John								
14	Flower betty								
15	Jars Jerry								
16	Mable Able								
17	Milligan Hortense								
18	Minder Mindy								
19	Moss Fern								
20	Planner Day								
21	Shade Lamp								
22	Sill Window								

Use the Participant Log to quickly create attendance sheets. Place the participating residents in the left column, the class name at top along with the time frame, the days of the week and you have sheets instructors/leaders can use to check mark who was participating.

By the way, remember you can also enter in participation using a laptop computer, tablet (like an iPad or other brand with the Android OS) or smartphone. Test this first. If you use these methods, you won't need the paper attendance sheets.



## Participant Log

### Uses for the log

- Interpret changes in participation
- Keep resident status up to date
  - Who is active in program
  - Reasons for temporary or permanent absence
- Interpret participation trends over time
- Create attendance sheets
- Update Community Profile

Participant (click the name to edit)	Participant's Status	Participant Notes
-1	Participating	
-11	Participating	
-12	Participating	
-13	Participating	Resident status required
-14	Participating	Qualified
-15	Participating	Qualified
Bob_John	Participating	Qualified
Bonnie_McIntosh	Participates, but only surveys are tracked	Can log in
Branch_Fern	Participating	Can log in; Qualified
Carrollian_Brad	Participating	Qualified
Cash_Susan	Participating	Qualified
Craddock_Dorcas	Does not participate but takes surveys	Qualified
Don_John	Participating	Can log in; Qualified
Dorcas_Dorcas	Participating	Qualified; Resident status required
Dorcas_Don	Invited to participate	
Dorcas_Lynette	Participates, but only surveys are tracked	Can log in; Resident status required
Jane_Jane	Participating	Can log in; Qualified
John_Alice	Participating	Can log in; Qualified
John_Mike	Participating	Qualified
John_Maryanne	Participating	Qualified
John_Windy	Participating	Qualified; Resident status required
John_Fern	Participating	Can log in; Qualified
John_Colleen	Participates, but only surveys are tracked	Can log in
Planner_Don	Participating	Can log in; Qualified



**Activities log**

Activity Participation: Click on the activity to edit who participated.

Activity Participation | Activity Schedule | Past Activities | **List of Activities**

Are these events? were scheduled to occur on the specific dates. to confirm who participated.

**Select the order you want:**

- Current activities in order of the next occurrence
- Current activities in by the activity's descriptive name
- All activities ordered by the activity's descriptive name

Right-click the text area and choose select all, then right-click the selected text and select copy:

Water weights  
 Fitness Center visits  
 Bottom up yoga  
 Painting class  
 Whole person exercise  
 Walking club  
 Mind challenge  
 Fit living  
 Arthritis water program  
 Gentle tai chi  
 Line dancing club  
 Water volleyball  
 Braintastic  
 Express yourself  
 All about health  
 Quilting club  
 Monthly meal w chef  
 Line dancing class  
 Managing diabetes


Copy into Excel or Word

Date Activity Occurred
Saturday, August 04, 2012
Saturday, August 04, 2012
Saturday, August 04, 2012
Saturday, August 04, 2012

The names of Activities you have in the system is also in the Community Detail Report. This is a method to download the Activities only. You may wish to use this for custom reporting.

ICAA ProMatura  
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ICAA/ProMatura Wellness Benchmarks



## Reports as Storytellers

Education of Wellness Staff (year)



Education Level	Percentage
Less than High School	~15%
High School Graduate	~35%
Some College	~25%
College Graduate	~25%



Category	Percentage
Independent Living	~55%
Assisted Living	~45%
Skilled Care	~20%

Resident Satisfaction with Community, Wellness Program and Wellness Staff



Category	Community	Wellness Program	Wellness Staff
Very Satisfied	~15%	~15%	~15%
Satisfied	~35%	~35%	~35%
Not Satisfied	~45%	~45%	~45%
Very Dissatisfied	~5%	~5%	~5%

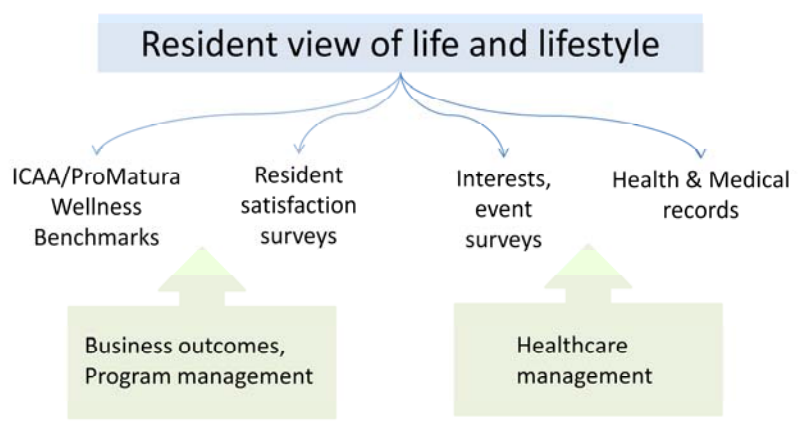
We all know the phrase: there is no mission without margin. Income/revenue is needed to support the work of any organization, regardless of whether it is for-profit or not-for-profit.

Use the reports to tell the story of how the program brings results that support both mission (residents' perceptions of their health) and margin (the business objectives).

These numbers have value when they are converted into knowledge for you to improve quality in the wellness program, and improve the overall life and experience of the residents. The numbers have value when you can show how the wellness program contributes to the organization's mission.

Use the numbers for your own analysis and program improvement, and use the knowledge gained to tell the story of the benefits to residents, your quality and efficiencies, and your contribution to the community.

## Benchmarks add to other information sources



The ICAA/ProMatura benchmarks do not replace others that focus on resident interests or health, but rather fit beside these to provide a complete picture of the program. The purpose of the benchmarks is different than the purpose of other surveys. By using two or more surveys, such as an annual resident survey, a program survey asking about what residents want, and indicators like the results of fitness assessments, you will be well prepared to make the case for wellness.

## 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

Many communities administer annual resident surveys, often administered by an outside survey organization. These surveys may or may not mention the wellness program. You can fill that gap using the benchmarks reports. Satisfaction by hours of participation in the activities/groups/classes you are tracking can help explain overall ratings of satisfaction with the community. This report may show that people who participate more often in wellness are more satisfied—reinforcing the value of the program.

High levels of satisfaction have been shown to influence residents' referrals\*, an important source to maintain occupancy levels.

Another case of the ICAA/ProMatura Wellness Benchmarks reports telling the story of the wellness program's value for mission and margin.

\*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

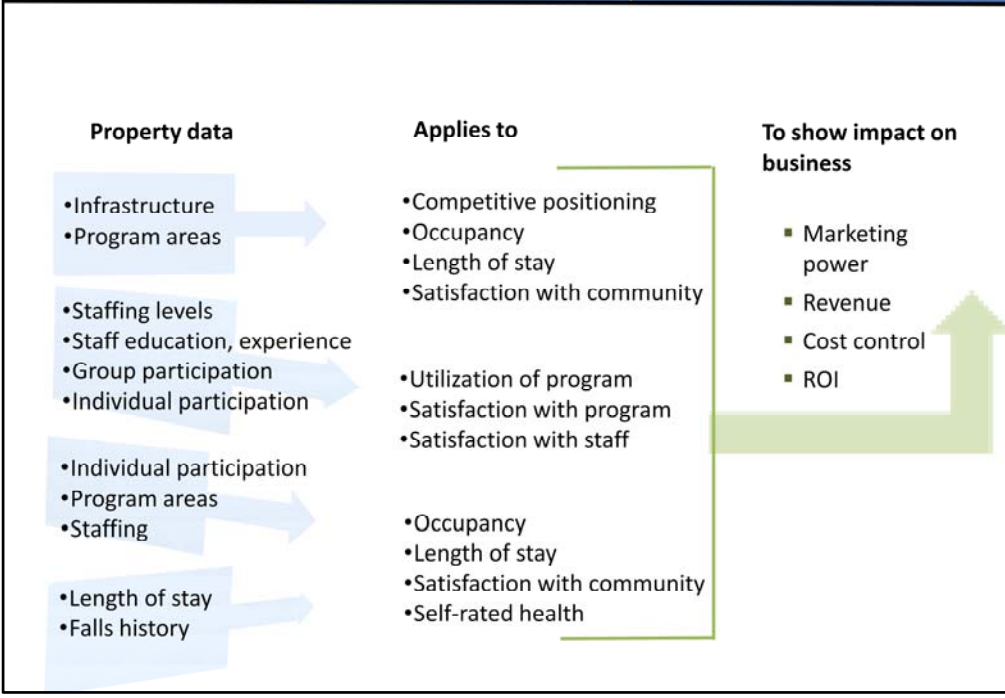
### Self-rated health



- Business objectives*
- Most independent possible
  - Satisfaction with community
  - Increase LOS
  - Occupancy

- Relates to premature mortality, disability, dementia, health conditions, mental health, future health
- Good, very good and excellent SRH reduce risks
- Higher ratings ➡ higher functional independence

Even people who have multiple chronic conditions can rate their own health as good or very good. How does wellness influence this self-rating? Use the benchmarks to find out.



The points in the reports refer to multiple areas of an organization’s business, supplying metrics that place wellness on the same playing field as other areas.



## Support

**Contact:** Pat Ryan, ICAA  
Program Manager

**Email:** [patryan@icaa.cc](mailto:patryan@icaa.cc) OR [info@icaa.cc](mailto:info@icaa.cc)

**Toolkit:** Benchmarks website  
[www.icaa.cc/Management/benchmarks.htm](http://www.icaa.cc/Management/benchmarks.htm)  
and after enrollment, your personal home page