

## ICAA/ProMatura Wellness Benchmarks

### *Metrics for the active-aging industry*

#### **Manager's guide to implementing the benchmarks**

There are many outcomes that an organization can measure. The ICAA/ProMatura Wellness Benchmarks give you and the staff the tool to measure what matters.

By choosing to implement the ICAA/ProMatura Wellness Benchmarks in your community, you are translating the wellness function into the language of business for objective program analysis and return on investment.

When you use the wellness benchmarks, you support staff in:

- putting their results onto paper in formats that are effective in setting goals, quality improvement initiatives and reports.
- preparing useful numbers for budgeting and investment decisions.
- developing business communication skills to more effectively work with others in the organization.
- objectively benchmarking program results and content against industrywide measures.
- providing marketing, resident services, therapy, nursing and other departments with outcomes that can be used to improve the synergy among departments and improve or streamline services.

For the benchmarks, “wellness” and “activities” are generic terms because retirement communities have many different structures and program names. For example, your community's wellness activities might be in:

- Wellness
- Resident life
- Activities
- Fitness
- Therapy
- Recreation

The indicators in the ICAA/ProMatura Wellness Benchmarks focus on elements of the program that can be measured. This may not include all of your wellness activities, and may include program/activities in various departments.

## The benchmarking process

The ICAA/ProMatura Wellness Benchmarks collect information through a password-protected online system. The database is secure.

Designated staff member(s) at each community enter information into the database. Once enrolled in the benchmarking system, the survey can be accessed at any time.

All data that are publicly reported will be an aggregate of all the input of participating benchmarking communities. No individual names will be reported.

## Who inputs and accesses the data?

Each location can have one username/password for an Administrator—the only person who can see everything in the system—and three usernames/passwords for Staff.

Each location can also allow residents to enter the system to record their attendance and enter the responses to the annual survey.

For your security, these logins have limited access.

Benchmarking system	Information collected	Frequency	Access
Community survey	General information about the property, counts of residents and program participants, average length of stay, staffing, staff education and length of service	Once a year	Administrator
Resident log	List of residents who participate 12 times/year	Ongoing	Administrator Staff
Resident satisfaction survey	Resident perception of overall community, wellness program, DOB and date of entry into community and program	Once a year	Administrator Staff Residents
Activities log	List of program activities that match generic types provided	Ongoing	Administrator Staff
Resident participation in Activities	Attendance of resident in each Activity	Ongoing	Administrator Staff Residents

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.

Any person who you authorize to enter the system needs a reliable Internet connection and basic computer skills. Make sure the username/password stays with you if the Administrator or Staff person ceases employment.

For example, you may choose to keep the Administrator username/password in the office of a senior manager who will complete the Community Survey and monitor the system. You may choose to assign the Administrator login to a wellness director or other staff title whose responsibilities include program management and budgeting.

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

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.

The advantage to allowing selected residents to use the system is that some people are motivated to track their attendance. Also, a resident who enters ongoing participation is one less resident for a staff person to enter.

A disadvantage is possible confusion on the part of residents, which requires staff time and attention to answer resident questions. Another is that residents cannot see a record of their own attendance. Once a resident (or staff person) clicks that X resident attended X activity, the activity disappears from the screen. Consequently, residents cannot use the system as a personal record of their activities.

## Support

Administrator and Staff have multiple support options to aid data entry.

- Online Toolkit: guides for completing each screen on the website; how to figure average length of stay; resident information sheet, satisfaction survey and activities log; worksheets to place community activities into generic types
- Online training webinars
- In-person user groups at ICAA Active-Aging Conference
- Email support

## Time commitment

During the first year, the people who enter the data need to access help from colleagues and set aside time to complete the surveys. All the information must be entered into the online forms. That will take time. However, once the initial data entry is complete, the time required will drop considerably because all that is required is updating.

There is a support Toolkit that with the documents in Word, PDF and Excel formats that will take users step-by-step through the system. As with most software, once the users are familiar with the system, they will move more quickly.

Benchmarking survey	Estimated time to enter the information	Variable
Community survey	3-6 hours to collect information 1 hour to enter online	Since this survey requires collecting information from other departments, there may be a gap in time to gather all the information.
Residents who participate in wellness program	1-3 minutes per resident	Entering a new resident takes longer, updating list is shorter. (This log becomes a roster for your internal use.)
Wellness participant satisfaction survey	3-5 minutes per resident	This survey has 10 multiple-choice questions and 2 asking for dates.
Wellness activities	3 minutes per class/activity/event	The time commitment depends on how many classes/activities/events match the ICAA/ProMatura list of generic activities.
Resident participation log	5 minutes per week, per resident	You can assign appropriate residents a password so they can enter their participation themselves, online.

## Front-end needs

When organizations participate in the benchmarks, they are collecting data for themselves, as well as for the national aggregate. You will need an internal system to:

- Collect some data from multiple departments, eg, administration or marketing or accounting or health care, to report measures that are already being gathered.
- Report by residents' service level: number in independent living, assisted living and the entire community.
- Determine which programs/activities/groups will be included in the benchmarks, and translate the community's names to the generic names used in the survey.
- Identify individuals who participate in wellness activities. It may be more time-consuming to count individuals (rather than attendance), but the individual creates the meaningful indicators on a national scale.
- Maintain the data contribution over time, allowing for changes in personnel and job requirements.
- Place the responsibility for providing the data, or reporting the data, into job descriptions and monitor compliance through the organization's performance management process.

## Introducing the benchmarks

These suggestions are based on the experiences of the executive directors and wellness directors who piloted the survey.

- 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.
- 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."

- 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.
- Establish a regular timetable for meeting to discuss how the benchmarking is progressing.
- Assign one staff member to have ownership of the benchmarking. Make this a job description responsibility.

### **Email support**

Address questions to the general inquiry box at [info@icaa.cc](mailto:info@icaa.cc)

Or

Pat Ryan, [patryan@icaa.cc](mailto:patryan@icaa.cc)

**ICAA/ProMatura Wellness Benchmarks**  
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