

ICAA/ProMatura Wellness Benchmarks

Metrics for the active-aging industry

Using the benchmarks as a management tool

"Not everything that counts can be counted,
and not everything that can be counted counts."

(Sign hanging in Albert Einstein's office)

As a management tool, the ICAA/ProMatura Wellness Benchmarks deliver indicators that count.

Management faces challenges when evaluating the contribution of “wellness” to the organization’s mission and business performance. Wellness program outcomes are harder to measure than outcomes for dining, health care and other areas. Decision makers—and residents themselves—may not see how providing residents with the opportunities for active, engaged lives contributes to occupancy, resident health and satisfaction, and the bottom line.

The ICAA/ProMatura Wellness Benchmarks were developed by multiple groups of active-aging industry leaders, representing chief executive and operating officers, vice presidents and other senior-level managers in seniors housing. Their purpose was to identify the key performance indicators that could assess the wellness program’s contribution to the community’s business objectives. Their goal was not to measure everything surrounding a wellness program, but to measure what counts for the overall program’s return on investment.

The work groups chose indicators that could answer key business questions:

- How many residents participate in and value the program?
- How are the program assets utilized?
- Is there progress in terms of participation and outcomes?
- Does wellness affect average length of stay?
- Do participating residents stay more independent, longer?
- Is there a potential for revenue contribution?

The numbers collected and tracked through the consistent methodology of the benchmarks:

- Indicate adherence of the program to the community's mission and values
- Become a dashboard of key performance indicators
- Demonstrate the value of the program to senior management, the board of directors, financiers, colleagues and residents
- Provide solid information for community outreach and marketing
- Anchor business plans for financing; support grant applications
- Generate performance objectives and monitor results
- Establish the basis for cross-department initiatives
- Guide decisions on funding and purchasing
- Separate residents' perceptions of the program from other influencers of satisfaction
- Compare the organization to its peer group and competitors
- Show return on investment

Why benchmark?

A benchmark is a performance measure that indicates how a department or functional area is performing. Key performance indicators aid management in objectively analyzing programs, facilities, staff and integration within the community. As benchmarking is repeated, trends and changes in performance can be tracked.

Organizations benchmark their indicators against others. The ICAA/ProMatura system will enable you to benchmark on a national scale, against many communities. When a large number of communities contribute to the system, the "best in class" are identified. Best-practice sharing enables the best-in-class properties to help others improve by sharing their approaches and methods.

Use the ICAA/ProMatura Wellness Benchmarks to:

- Assess the business impact of the wellness function
- Set goals for the community
- Set goals for the wellness program
- Measure progress toward goals
- Identify areas for quality improvement
- Track progress over time
- Compare the program with competition
- Identify best practices

The management tools

Two types of reports are produced from the ICAA/ProMatura Wellness Benchmarks.

A **community report** presents the data input. As the property and program information is updated each year, the report tracks changes over time. This is useful to show performance versus objectives.

The **industry report** is an aggregate of the input of all communities in the database. The report allows individual communities to compare their programs and outcomes with others in the industry. With a sufficient number of communities participating, you can compare your communities with others of the same type.

The industry report also identifies best practices. What are the characteristics of communities that are best in class?

Benefits of the Wellness Benchmarks system

Sustainability. Once the data is entered into the online system, consistent reporting is in place. This helps wellness staff effectively report their results, and organizations maintain the effective reporting regardless of staff turnover. Wellness staff members who are inexperienced in collecting and reporting business data will have a system already in place.

Program evaluation. Look at change over time in your community, and how your services compare with others. For example, where can departments work together to support wellness goals? What wellness activities should be added? Removed? What is the reason for an increase, or a decrease, in participation? Is the staffing appropriate to the goal?

Job responsibilities. The benchmarking system helps clarify and prioritize key job description responsibilities. There are many things that staff members could do, but what are the critical success factors that should be prioritized?

Objective performance reviews. When the most important outcomes are known and agreed to by manager and staff members, then discussion during performance reviews focuses on results for the residents and the organization.

Budgeting tool. The Wellness Benchmarks collect data that present information for financial and resources allocations. This numbers-based, objective approach is compatible with other indicators used within an organization.

The ICAA/ProMatura Wellness Benchmarks are a companion to instruments you may already be using. For example, scan card systems are useful tools to track participation; the output from these systems transfer into the Wellness Benchmarks. There are already excellent instruments available to measure the impact of wellness activities on individuals' health, function and satisfaction. The benchmarks do not replace these surveys, but rather balance that input with a clear picture of how wellness contributes to those results.

Long-term Community Value

The first year of benchmarking results in a useful snapshot of the community, the program and outcomes. The value of benchmarking emerges as data collected over the years shows changes in results.

Security

Survey data are completely anonymous and confidential. No one will see the input of an individual community except for the community's staff and the database manager.

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

Support

You and the wellness staff will find support tools to implement the benchmarking system.

- Screen-by-screen instructions
- Guides to completing the survey for wellness staff
- Webinars for first-time users
- Conference call support for ongoing questions and suggestions
- Meetings at the International Council on Active Aging Conference

Get started

To enter the benchmarking system, go to www.icaa.cc. Information on the system and a link to the survey instrument are on the website.

Questions? Email Pat Ryan at ICAA patryan@icaa.cc