

WALA ADVOCATE

WISCONSIN ASSISTED LIVING ASSOCIATION • SPRING 2024 VOL. 29 • NO. 1



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CHAIRPERSON'S CORNER

By Glen Weyenberg, WALA Board Chairperson



As the newly elected Chairperson of WALA, I am both honored and excited to serve and contribute to the association's mission of supporting assisted living communities through advocacy, education, and service. This issue of the newsletter marks not only my introduction in this role but also an opportunity to share my vision for WALA and how we can continue our mission.

My journey with WALA began six years ago as a board member. Throughout these years, I've witnessed the incredible impact our association has on supporting the evolving needs of assisted living communities, their staff, and residents. Stepping into the Chairperson role, I am more committed than ever to build upon this legacy and strengthen WALA as a premier resource for our members.

As a Principal with SVA Certified Public Accountants, I've learned the importance of building a culture that emphasizes not just excellence in service, but also the value of everyone within our team. This philosophy is deeply embedded in SVA's 31 fundamentals, which guide us in creating a workplace where everyone feels valued, supported, and part of a larger mission.

As we take on the challenges and opportunities of the industry, I believe these fundamentals can make a significant difference and I hope you find some inspiration in them.

Embrace Change and Growth

This fundamental certainly stands out to me in today's constantly changing healthcare landscape. As we navigate through the complexities of healthcare, especially staff acquisition and retention, what worked in the past may

not work now. We must be open to new ways of attracting and keeping our talent and be ready to step out of our comfort zones for the betterment of our teams and the communities we serve.

Lead by Example

Demonstrate the values you wish to see in your staff and management. By embodying the dedication, compassion, and respect we seek, we can inspire our teams to follow suit, fostering a culture where everyone feels valued and empowered.

Keep Things Fun

This is so important in the high-stress world of assisted living. Our work is serious, but that doesn't mean we can't have fun. By keeping things light when appropriate, we can help alleviate the inherent pressures of our work, making our facilities not just places of care but homes of happiness for both residents and staff.

As I step into the Chairperson role after six years on the board, I am committed to serving our members and advancing the mission of WALA. Your support, insights, and dedication are what will drive us forward, and I eagerly anticipate the collaboration, challenges, and triumphs that lie ahead.

I look forward to sharing with you the goals the Board of Directors established for the Association and the progress we are making on those goals during future Chairperson's Corner updates.

CEO CORNER

By Mike Pochowski, WALA President & CEO



Thank you to everyone who joined us at our 2024 Annual Conference. It was great to see and host 700 assisted living professionals and industry experts. We were excited to have 113 exhibitors, 36 educational sessions, and a number of great networking opportunities – notably kicking off the conference with Felix and Fingers Dueling Pianos. Further, it is always an honor to celebrate the Annual Hero Awards. Thank you to all of our attendees, sponsors, exhibitors, speakers, and volunteers for making the conference a huge success.

We are also looking forward to our events and classes for 2024:

83.15 CBRF Administrator Course

June 2024: Madison, WI

October 2024: Deforest, WI

2024 Autumn Golf Classic

August 28, 2024: University Ridge Golf Course (Madison, WI)

Fall Conference

September 18, 2024 (Brookfield, WI)

WALA Management Essential Courses

April 25th: 4 C's of Leadership –

Communication + Coaching (part 1)

Executive Presence Workshop

May 7-8th

Senior Living 101

May 14th

4 C's of Leadership –

July 25: Conflict Resolution + Collaboration (part 2)

You can find information about all of our events at www.ewala.org

In addition, we are happy to report that through our active advocacy efforts, we were able to kill the following bills:

[Assembly Bill 162](#) – would have increased the resident notification requirement for community-based residential facilities (CBRF) from 30 days to 60 days if a provider closes or changes its level of services or means of reimbursement

[Assembly Bill 1007](#) – would have established procedures and requirements for the Wisconsin Department of Health Services (DHS) and adult family homes (AFH) to follow when an AFH is closing, changing its type or level of services, or changing the means of reimbursement that they will accept.

[Assembly Bill 942](#) – would have required CBRFs and residential care apartment complexes (RCAC) to lift/transfer residents found on the floor and have at least 1 staff member trained in CPR onsite. In addition, would have required initiating CPR on a resident found unresponsive.

WALA will continue to advocate on your behalf. Thank you for your continued support and membership in WALA, we greatly appreciate it.



The Wisconsin Assisted Living Association (WALA) is the largest trade association in Wisconsin representing the assisted living profession. Our mission is to support assisted living communities, staff, and residents through advocacy, education, and service.

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THE LEGAL EDGE

The Legal Edge is a regular feature column authored by the Assisted Living and Long Term Care Group at the [Reinhart Boerner Van Deuren law firm](https://www.reinhartboerner.com) featuring Bob Lightfoot, RN. Bob Lightfoot can be reached at 608-229-2257 or rlightfoot@reinhartlaw.com.

UPDATES FROM THE FRONTLINE

The Bureau of Assisted Living (BAL) held it's Assisted Living Forum on February 13th of this year. Here are some important updates and trends to be aware of:

1. Complaints

The numbers of complaints in assisted living continues to rise. If there's any good news, it's that only a small percentage of facilities comprise the overall number of complaints. TIP: review your in-house grievance process. Don't let the complaint get out the door. Focus your efforts on keeping complaints in-house where they can be addressed more quickly and more thoroughly.

2. Emergency Preparedness

Anticipate surveyors asking for your emergency preparedness plans, so have them ready. TIP: Don't forget about the "other" drills that need to be conducted semi-annually (tornado, flooding, other emergencies) and the simulated nighttime fire drill.

3. Involuntary discharges

BAL is seeing an increasing amount of involuntary discharges and appeals of discharges. TIP: ensure your supporting information for the discharge is accurate and supportive of the discharge. For difficult discharges, involve the regional director, the ombudsman, the MCO if applicable and of course, your legal counsel. In the supporting documentation, make sure any change in condition is clear and that the reason for discharge fits squarely within the code's allowable reasons.

4. Siderail Use

Residents continue to die due to siderail use: several resident deaths in 2023 and already two resident deaths in 2024 due to siderail use. TIP: Ensure the safety risk for the use of siderails is clearly assessed. Siderails may only be used as an assistive device, not to keep a resident in bed or it's considered a restraint. <https://www.mcknightsseniorliving.com/home/news/exponential-increase-in-bed-rail-deaths-leads-to-alerts-from-federal-state-authorities/>

5. Norovirus

Norovirus has been particularly prevalent this season, both in facilities and in the community. TIP: review the DHS website as to all things Norovirus: <https://www.dhs.wisconsin.gov/foodborne/norovirus.htm>

Remember, the BAL Assisted Living Forum is held four times a year from 10:00AM to 12:00PM. The remaining dates are: June 18th, August 20th and October 15th. To view the AL Forum, access it here: <https://dhs.wisconsin.gov/assistedlivingforum/j/1604806553?pwd=enowbWtuMjA5YWxtUW5GWXVaQTFEOT09#success> Or join by phone: 669-254-5252, meeting ID 1604806553 and passcode 438699 #



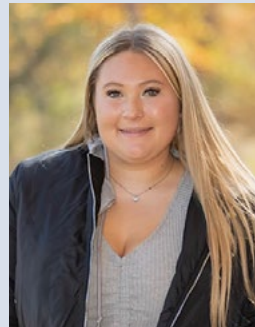
WALA HONORS THE 2024 WALA HERO AWARD RECIPIENTS

ABOUT THE WALA HERO AWARDS

The WALA Hero Awards serve to recognize outstanding employees in assisted living communities all across Wisconsin. Honorees represent the heart of assisted living through their exemplary work - going above and beyond the call of duty to provide the highest level of care, support and compassion to residents, residents' loved ones, and fellow employees. Nominated by their peers in 4 distinct categories, the honorees represent a diverse range of job titles, experience and responsibilities, but they all have caring spirits that exemplify what it means to have the heart of a hero.



Caregiver: Sheyenne Kisonis The Legacy at St. Joseph's, Kenosha WI



Sheyenne began her assisted living journey a short time ago as a High School Youth Apprentice student and is now in college to continue in the healthcare field. Early on, it was very evident that she was wise beyond her years. She shows compassion and empathy for residents that cannot be taught by any instructor. She has

an exceptional work ethic and is thirsty for knowledge, frequently asking questions about medications, diagnoses, regulations and policies. She initiated a mentor program for new hires to ensure proper training and promote longevity and has helped with creating a referral program. Her upbeat personality is contagious!

Department Director: Amanda Narloch Elizabeth Residence, Franklin



Amanda's journey began in 2003 at the young age of 16, working as a Utility Aide and eventually working her way up to a Resident Assistant. Immediately, her quality of care and her ease of communication with seniors was evident. In 2004, Amanda reached her 1st milestone of becoming a CNA. After high school, she continued working full time while

furthering her studies and achieved her next goal of being a Certified Medical Assistant in 2009. Amanda's calling has always been in Nursing Care. Her genuine and compassionate approach to service has always been her greatest strength. In 2020, Amanda completed her RN education. Despite the demands and stress that comes with the job, you will always find Amanda with a smile.

Team Member: Tom McAnly Frontida Liberty House, Fond du Lac



Tom McAnly is 73 and currently working on his third career. His first 35 years were in the lawn and garden industry working in Iowa and Wisconsin. He spent the next 8 years as a church planter and administrator in Wisconsin. He then became a caregiver for his wife of 26 years as she suffered from Alzheimer's. After her passing, he joined Frontida, focusing on life enrichment

for memory care residents. Tom believes that when God closes one chapter in our lives, He begins a new one. In this case, it has given him the gift of an amazing woman named Carol. They will be joined in marriage in June and share in their 4th quarter of life together.

Executive Director: Valerie Peralta Azura Memory Care, Clinton



Valerie has proudly been a part of the Azura family for many years, currently serving as the Executive Director for Azura Memory Care of Clinton. She started her healthcare journey as Team Lead for the Azura of Clinton home. Seeing the great impact she had on the residents and team there, Valerie was selected to serve as Executive Director. Her leadership skills and

dedication to Azura and their residents makes her truly exceptional in this role. She takes a lot of pride in supporting and mentoring new employees and ensuring that team members are happy, comfortable and have the resources available to provide exceptional care.

NAVIGATING SUCCESS: NURTURING NEW MANAGERS IN LEADERSHIP ROLES

By Becca Rouse

Have you ever had an amazing employee promoted to a leadership role and that same level of success was not attained? This is not uncommon; it is often assumed that the personality traits and technical skills that helped someone succeed at one level will carry through to the next. Unfortunately, this is not the case; 60% of new managers fail within 24 months of their new role. Maya Angelou says, "Do the best you can until you know better. Then when you know better, do better." When employees start a new management/leadership role, organizations can do better. It all starts by analyzing and recognizing the areas in which the person being promoted needs development. Often organizational leadership becomes more focused on data points and key performance metrics (KPI's) than what new managers really need:

Communication skills

Effective communication is the cornerstone of successful management. New managers may struggle to articulate expectations, provide constructive feedback, or foster an open and collaborative environment. Miscommunication can lead to misunderstandings among staff and impact the quality of care for residents.

Conceptual Skills

The manager's job is to help the team see the short- and long-term goals of where the team and organization is headed. One on one professional mentorship sessions can help new managers move beyond the day-to-day tasks to understand the larger role these daily tasks play in an organization's strategic plan.

Delegation and Accountability Skills

One person cannot "do it all." When a manager tries to take on all the responsibilities, we see two things happen. The first is employee burnout. The second is the inability to look at the task from a bird's eye viewpoint offering guidance and solutions. It limits the ability to lead the team.

Root Cause Analysis

Learning to understand the root cause of any issue, concern, or system break down will help to ensure that solutions put into place are long term and not a temporary "band-aid."

Healthy Conflict Resolution

Learning how to disagree in a healthy way can help to build trust and rapport with staff, residents, and family.

Decision Making

Provide new managers with the tools and resources they need to feel successful with decision making. Help them to feel empowered and confident with the decision making process.

Mentorship and Support Networks

Establishing mentorship programs and support networks can provide new managers with guidance and a platform to share experiences. Peer support is invaluable in overcoming challenges and fostering a sense of community within the organization.

Change Management Skills

Staff members may resist new management styles, particularly if the transition is abrupt or lacks transparency. Change management skills are crucial for new managers to navigate resistance and ensure a smooth transition.

New managers often face hurdles that, if not addressed effectively, can lead to failure. Understanding the common pitfalls and implementing strategies to support new managers is crucial for the success and well-being of both the team and residents.

Addressing the challenges faced by new managers in assisted living organizations is essential for maintaining high-quality care for residents. By investing in comprehensive training, fostering effective communication, and providing ongoing support, assisted living organizations can ensure that new managers thrive in their roles. The investment will contribute to the overall success and well-being of both staff and residents.

Source: (Frontiers in Psychology, "Leadership Communication: A Communication Approach for Senior-Level Managers," <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6581055/>)

Source: (Journal of Nursing Management, "Effective Change Communication in the Workplace: A Review," <https://onlinelibrary.wiley.com/doi/full/10.1111/jonm.12119>)

Becca is an accomplished professional with a distinguished background in healthcare administration and education. Armed with an MBA and a Bachelor's in Healthcare Administration from the University of Wisconsin - Eau Claire, Becca has been a prominent figure in both academia and the corporate sphere. Currently serving as an Associate Lecturer at the University of Wisconsin-Eau Claire, Becca leverages her expertise to develop and deliver high-impact instructional content, fostering an inclusive learning environment. Becca brings engaging presentations covering diverse topics ranging from organizational behavior management to effective leadership strategies in the workplace. Join Becca for an upcoming WALA Management Essentials course



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HEALTHCARE & LONG TERM CARE CYBER HYGIENE

Cyber, Healthcare, Property & Casualty, Risk, Senior Living & Social Services

By Kelsey Haag, M3 Client Executive

It's no secret there has been an increasingly sophisticated and widespread effort to target the healthcare industry with cyber-attacks. Your industry is one of the most desirable industries to cyber criminals due to the valuable personal information you store.

You may think that cyber-attacks only affect large hospital organizations, but statistics actually show that 58% of malware attacks are on small businesses (2018 Data Breach Investigations Report). Hackers are looking to these smaller organizations as targets that require less time and effort, with money to exploit.

Cyber Measures Healthcare Organizations Must Have in Place

Given the trend in threats targeting the healthcare and long term care industry, cyber insurance carriers are more cautious than ever to safeguard themselves. Carriers are verifying that the most basic security measures are in place to determine both insurability and rate at your next renewal.

- [Multifactor authentication \(MFA\)](#) on email, remote access AND privileged users as an extra layer of security to verify the identity of the person trying to gain access to an account.

- Data management, backup strategy and security can vary and carriers want to know more. Out-of-date backups or backups that aren't segregated aren't worth much when you experience a system-wide compromise. It's important to implement a proven and tested data backup and recovery. Even if your organization outsources data management, it's good to make sure that your vendor has access controls in place and that you are running security checks on your vendors.

- Privileged Access Management (PAM) sets policies and procedures to ensure the security of sensitive data and special access permissions for users, accounts, processes and/or systems.

- [Endpoint Detection and Response \(EDR\)](#) for continuous and automated real-time detection to respond to cyber threats like ransomware and malware. The days of firewalls and antivirus software aren't enough for today's advanced cyber criminals.

- Regular employee education & training. Threats are not only external, but internal, with one of the leading causes of loss being human error. On average, a person receives 80 emails per day. Train staff to recognize suspicious emails and when a call to action is needed.

- Email filters (aka spam filtering) to allow the software to flag spam/phishing content, and automatically move to a separate folder.

Key Takeaways

Healthcare organizations are being targeted by cyber criminals at a growing rate due to the valuable personal information they store. At the same time, cyber insurance carriers are becoming more cautious of insurance placement, and are requiring organizations to have security safeguards in place in order to obtain coverage.

Healthcare organizations would be well-served to evaluate their current security programs and plans, and update them to current standards in order to obtain reasonable cyber insurance coverage at your next renewal.

[Reach out to your M3 account executive](#) to discuss your current cyber coverages, or risk management practices you can put into place in order to better protect your organization, employees, and patients.



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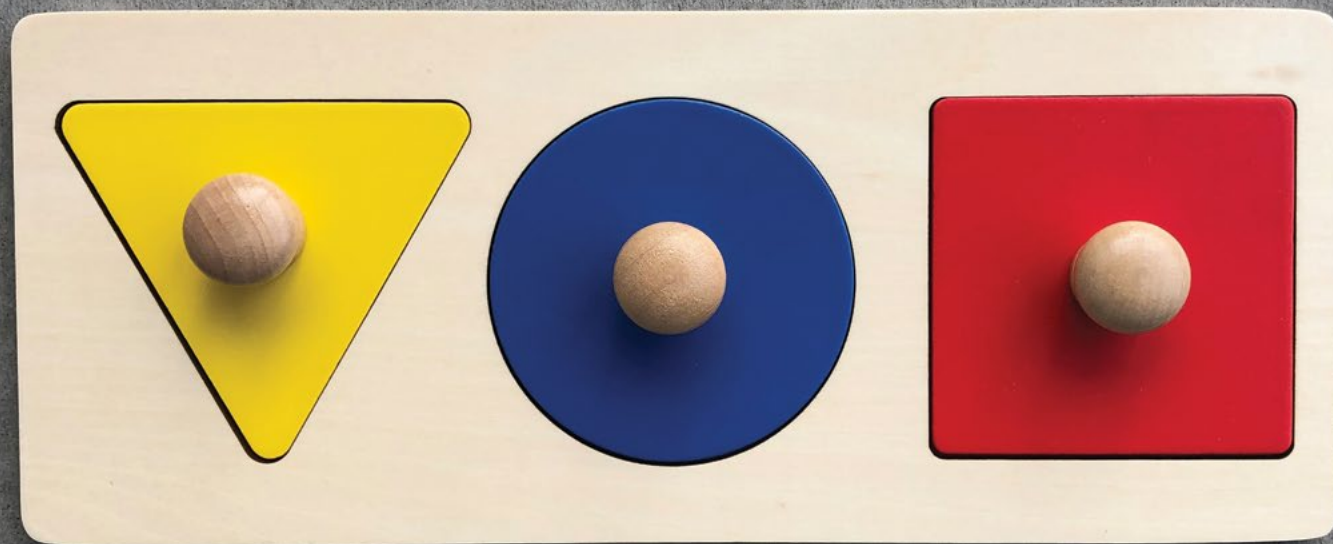
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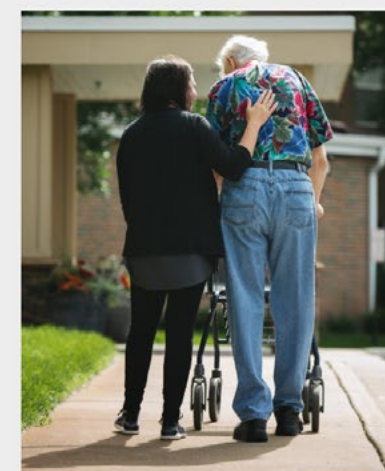
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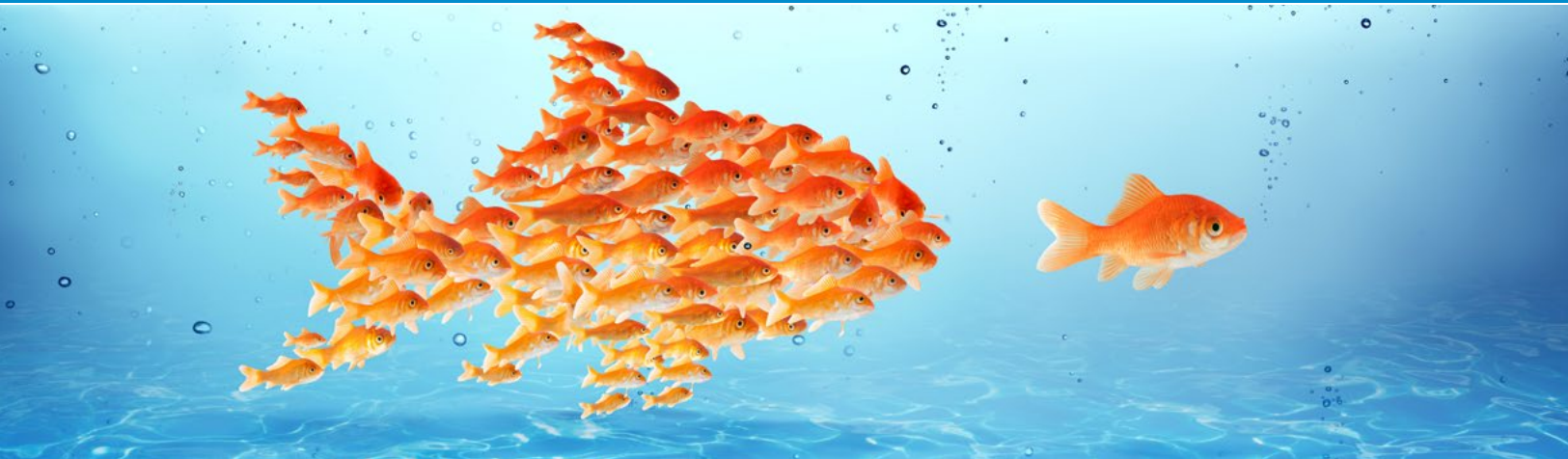
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THE FOUR C'S OF LEADERSHIP

Dave Molenda with Positive Polarity

If you Google the word "leadership", you get 6,770,000,000 results. Trying to find something in that list is to say the least, overwhelming. By offering the Four "C"s of Leadership, we have made it easy for you to gain some more practical knowledge and understanding on the topic of leadership.

Communication, Coaching, Collaboration and Conflict Resolution are the topics that we will tackle together. The great part of this list is that it applies not only to our professional life, but there are some takeaways that you can apply in your personal life as well.

We will start with Communication and Coaching together. Did you know that 85% of your success today revolves around how good you can communicate? Yet, how many of us invest time learning about our communication and finding ways to improve it. We will cover 10 tips to better communicate for you to your team, your leadership, and your patients. We will see how nonverbal communication and tonality can hinder our message to others. Additionally, we will unpack the concept that communication must change based on your listener. Just like different languages are spoken, there are different styles of communication that must be understood to maximize the effectiveness of the communication.

Once we have a foundation for better communication, we will talk about coaching. Did you know that research shows that coaching in an organization can improve their business results by 21%? Coaching is a low-cost effective model used in successful businesses around the globe to not only boost morale and engagement, but also increases productivity. Each person on your team has a present level of performance. Additionally, they have a desired level of performance. The performance gap is the difference between where they are now and where they want to be in the future. This is where

coaching comes in. The most successful leaders are also the most successful coaches. Together, we will see how to help your team with coaching as a tool for success.

In the second session, we will unpack what it means to collaborate. Research shows that 75% of your team rate teamwork and collaboration as "very important", yet most don't have training on either. We will explore the five ways that collaboration benefits the workplace and how to create this attitude of collaboration. Collaboration is proven to increase employee engagement and employee engagement is what every successful leader is searching for in their team.

To complete the training, we will learn effective ways to resolve conflict on the team. Whether you are part of the conflict, or you are facilitating others to successful conflict resolution, this session will outline a path to success. Did you know that not all conflict is bad? Generally, when people think of conflict in the workplace, it has a negative connotation. We will explore the positive side of conflict and how to navigate these rough waters.

If you are new to leadership, then these four topics are a great springboard to further exploration into leadership. If you are an experienced leader, then these four topics serve as great reminders on how to improve your leadership.

Throughout these topics, we will bring in real world examples, case studies and provide time to learn from the audience. It will be highly interactive so that we can learn from the others in the room.

WALA is committed to helping its members continue their quest for education in 2024 and beyond.

DIAMOND SPOTLIGHT ON THE HEATHER BRUEMMER PROVIDER ACHIEVEMENT AWARD FOR ASSISTED LIVING QUALITY

Valley VNA Senior Care, located in Neenah, WI, has been honored as the recipient of the 2023 Heather Bruemmer Provider Achievement Award for Assisted Living Quality by the Wisconsin Assisted Living Association (WALA). This prestigious recognition is a testament to Valley VNA's longstanding commitment to excellence, evident through their active participation in the Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL) and WALA's Diamond Accreditation Program.

The selection of Valley VNA by the WALA Diamond Committee underscores the community's commitment to the values and principles embodied in the Heather Bruemmer Award. Valley VNA's dedication to providing high-quality care is exemplified through a range of initiatives and programs designed to enhance the well-being of their residents:

1. Tailored Memory Care Programs: Valley VNA has developed specialized programs catering to memory care residents. These initiatives prioritize inclusivity and address the sensory needs of individuals in late-stage dementia, fostering a supportive and enriching environment.

2. Community Engagement: The community has forged meaningful partnerships, such as collaborating with the local public library to create intergenerational programming like



"Storytime for Everyone." These initiatives promote a sense of belonging among residents.

3. Vibrant Social Events: Valley VNA hosts events like Senior Prom and Lyrics and Laughter, encouraging individuals with memory loss and their caregivers to partake in joyous moments of music, dance, and singing in a warm and welcoming group setting.

In addition to these remarkable programs, Valley VNA maintains a strong commitment to ongoing quality improvement. They actively work to reduce medication errors, stabilize resident weight, and minimize resident infections. Their dedication to incorporating person-centered care and a commitment to quality into their organization sets them apart as an exceptional provider. Valley VNA continually goes above and beyond, demonstrating their unwavering commitment to enhancing the well-being and quality of life for their residents.

WALA's 83.15 CBRF ADMINISTRATOR COURSE



WALA is pleased to announce dates for our 2024 83.15 Administrator's Course.

2024 COURSE DATES:

June 2024, Madison • October 2024, Deforest

Registration is limited so [visit us online](#) to learn more and to apply for your spot today!



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August 28, 2024
University Ridge Golf Course, Madison

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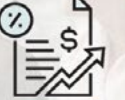
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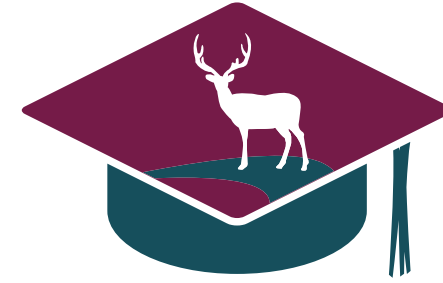
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First Call Medical Solutions	Menomonee Falls	Oasis Senior Advisors	West Bend
JFB Enterprises, LLC	Nashotah	Home Sweet Home LLC	Mount Pleasant
Kilter Healthcare Consulting, LLC	Boulder Junction	Skyline Services, Inc	Middleton
Advanced Wound Care	Racine		

PROVIDER MEMBERS

COMPANY NAME	CITY	COMPANY NAME	CITY
Greenwood Adult Family Home LLC	Milwaukee	Preferred Care LLC	Fort Atkinson
Joyful Manor AFH	Milwaukee	M & M Group Home	Platteville
Royal People Care	Madison	Advanced Community Care LLC	Middleton
Kosy Enterprise LLC	Milwaukee	Caring Hands Residential Homes, LLC	Mount Pleasant
Good Care, Inc.	Green Bay	Castle Rock Care LLC	New Lisbon
BUCKS HOME HEALTH LLC	Madison	Three Pillars - Riverside Lodge	Dousman
Lavern's Loving Care	Racine	Altruistic Assistant Living Ce	Milwaukee
Busy Beez LLC	Madison	Flower Care Services LLC	Madison
Bessie Mae Family Home LLC	Milwaukee	Doma AFH	Minneapolis
ABNA CARE LLC	Janesville	Shaddai Care Adult Family Home LLC	Madison
Living Bond Community, Inc	Madison	Icare Homes LLC	Columbus
Successful Care Adult Family Home	Mequon	AJ's Living Home LLC	Milwaukee
First Care Midwest	Kenosha	UNLIMITED ADULT CARE LLC	Menasha
Quality Adult Family Home LLC	Milwaukee	True care homes incorporated	Appleton,
Nexus Residential Homes LLC	Hudson	HarborChase of Shorewood	Shorewood
Statewide Goup Homes LLC	Appleton	Guardian Manor	Brown Deer
Abundance of Grace LLC	Milwaukee	LOYAL HOMECARE LLC	Racine
Matthias Academy ADCC AFH	Pleasant Prairie	Lake Shore Assisted Living	Minocqua
ALI AMAAN RESIDENCE LLC	Madison	A Peace of Mind Adult Family Homes LLC	Milwaukee
Bon Samaritain Family Care LLC	Madison	Joy House Residential Services	Janesville
SKYLINEHOMECARELLC	Oshkosh	Willing Hearts & Hands LLC	Racine
Ultimatehomecare LLC	Eau Claire	Serenity Group Home LLC	De Pere
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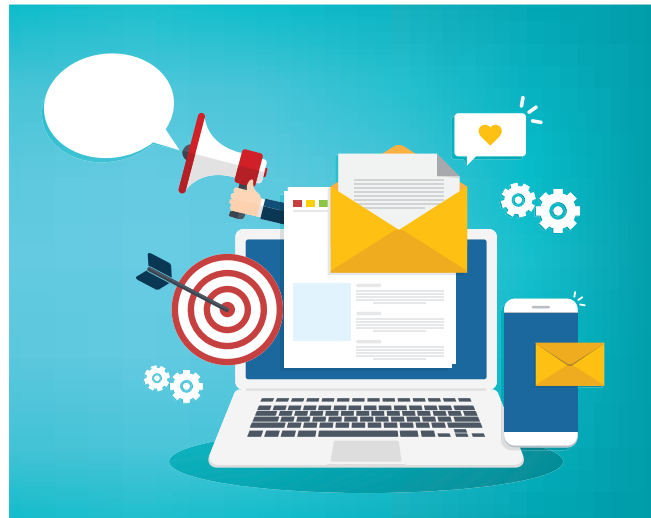
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MAXIMIZE MARKETING EFFECTIVENESS WITH PLACEMENT AND LEAD AGGREGATORS

By Kim M. Seidl, (former) Owner and Executive Director, CarePatrol of Greater Milwaukee & SE Wisconsin

Amid a growing demand for senior living options, the assisted living industry operates at the intersection of providing necessary care for seniors and maintaining financial viability. Workforce shortages, inflation across multiple sectors, and an increasingly competitive marketplace with multiple marketing channels have resulted in unprecedented operational pressures in the industry. It is time for a fresh and comprehensive review of lead sources and the financial implications of marketing expenditures that translate to effective and successful move-ins.

Consider this scenario: Would you allow someone to pick the tomatoes out of your August garden and then resell them to you for your farmstand? The analogy may seem absurd, yet it sheds light on the dynamics at play in the assisted living industry. Web-based assisted-living lead aggregators, akin to the tomato picker, actively compete with the SEO marketing spends of the very communities they sell leads to. This scenario underscores the need for a shift in perspective towards mutually beneficial business relationships built over time with a variety of marketing resources including both placement and online organizations.



In the March 26, 2024, Senior Living Foresight, Jozsef Horvath made a compelling case in his article, Rethinking Senior Living Sales: The Imperative for a New Paradigm. "When the information of prospective residents is cast into the abyss of A Place for Mom and similar platforms, what ensues is a deluge of generic, insistent communications focused solely on booking tours. This not only alienates prospects, often leading them to postpone the transition to senior living until it's a matter of necessity but also results in shorter residencies and higher commissions for aggregators — not to mention leaving a trail of negative experiences that rapidly spread through word of mouth."

An effective marketing strategy utilizes all lead sources for the determination, selection, and move-in of the most viable new resident candidates. Placement companies prioritize personalized matching and individualized support. Unlike online lead aggregators that primarily gather information

and generate leads through digital channels, placement companies take a hands-on approach to understanding seniors' care needs, financial resources, and lifestyle considerations. A senior care advisor will provide one-on-one guidance to seniors and their families, ensuring that they are presented with the most suitable assisted living community options. The placement business model provides this service at no cost to the senior or their family and is perceived as a beneficial and necessary service during a loved one's change in care needs.

An experienced and professional senior care advisor will provide a prequalified and appropriate new resident, provide one-on-one guidance to the senior and their family, and work in tandem with the community marketer for consideration of the most appropriate and viable candidates for move-in. Assisted living decisions are often complex and overwhelming for seniors and their families. A senior care advisor can provide valuable insights, answer questions, address concerns, and offer support at every stage of the placement journey. They help seniors navigate the intricacies of senior living options, understand pricing structures, explore payment options, and coordinate move-in logistics. By leveraging their expertise, community marketers have additional support for a move-in while empowering seniors and their families to make informed decisions.

Effective use of placement can positively impact the financial performance of assisted living communities. Seniors often make decisions when facing a transition of care, necessitating timely support and care. By balancing occupancy with acuity and staffing levels, communities can optimize efficiency and avoid undue workforce burden. A senior care advisor serves as an extension of marketing efforts, saving marketing staff time and facilitating move-ins through prequalification and interaction with the client and family, and will interface with healthcare professionals as appropriate for accurate and on-time discharge and move-in.

Assisted living communities should evaluate the potential revenue and occupancy impact of accepting a move-in from

all marketing sources, including web-based leads and clients presented by a placement organization. Whenever possible, it is beneficial to accept a tour for a prequalified new resident while continuing to work a "lead list" from other sources. In addition to the marketing expense, communities must carefully consider the cost-benefit analysis related to the financial resources and acuity level of prospective residents, as well as the lost revenue opportunity of empty rooms. In consideration of a placement fee, meaningful metrics to analyze the financial viability of the move-in include the return on investment per placement dollar as well as the cost of lost revenue per resident day.

Effective senior care advisors are an extension of a community's marketing budget and offer an ROI of \$22 for every dollar spent on placement fees. A quick analysis results in a nominal 4.5% cost over a 22-month length of stay (national average) based on a 100% fee (first month's board and care). With an average monthly (Wisconsin) cost of \$4,880, the value of that move-in is \$107,360. The longer the stay, the greater the ROI for the associated fees. In addition, every move-in mitigates the lost revenue associated with empty rooms. Based on the value of a move-in, the lost revenue per resident day (PRD) equates to \$1,124 per week (\$160.53 per day) based on an average of 30.4 days per month.

A critical look at the costs associated with placement fees must include careful consideration of the lost revenue of empty room(s) and the viability of potential new residents from other lead sources. It is always beneficial to accept the tour from a senior care advisor and weigh a potential application in consideration of other leads and the cost associated with either accepting the placement fee or maintaining an empty room. Focusing on paying a placement fee without recognition that an empty room is filled, is a one-sided view of the financial effectiveness of working with placement organizations.

While major web-based lead generators prioritize marketing and closing skills, professional placement organizations such as CarePatrol focus on meeting residents' needs for safe and appropriate long-term care solutions. An ethical and professional placement organization serves as an extension of communities' marketing teams, offering prequalified new residents offsetting the expense and challenges of the marketer's role in the placement process.

Mutually beneficial relationships are built over time. Find a senior care advisor or two that is proven trustworthy and continue to work with them regardless of your census. Mortality doesn't fit into a spreadsheet, and a full house today can give way to four empty rooms next week. Don't switch "on and off" your willingness to pay a placement fee based on fluctuating occupancy. Accept the tour request and make an informed decision about the most financially viable new resident candidate from all options. Finally, with

an ongoing cooperative relationship, consideration is often given to a reduction in negotiated fees for residents who pass away or move out early resulting in a shorter length of stay. Most placement offices are locally owned and operated with policies determined at a local level by people who live and work in your town.

This month A Place for Mom is signaling a change in its marketing approach by laying off the customer success management team (6.8% of its nearly 900-person workforce) to focus on the role of Senior Living Advisors, somewhat mimicking the traditional placement business model. In a March 18 article, Company CEO Larry Kutscher told Senior Housing News, that the change "is a result of our strategy to have our advisors connect more directly with our community customers" and "enable our SLAs to sell the differentiated value of each local community".

The shared goal of all stakeholders is that the care and housing needs are met for a senior facing a transition of care, regardless of how they find the front door. The solutions provided must be safe and appropriate for the senior and meet the care and financial criteria of the community. It is essential for a marketing strategy to utilize all marketing sources including web lead aggregators and placement organizations for the determination, selection, and move-in of the most viable new resident candidates. The cost-benefit analysis makes it clear that working with placement professionals provides a resource for prequalified move-ins to supplement a community's ongoing marketing efforts. By understanding the unique roles and value of both placement organizations and lead aggregators, communities can navigate the complexities of multiple marketing channels to maximize marketing effectiveness and maintain financial viability.

Since 1993, CarePatrol has set the bar for the placement industry as the nation's oldest and largest senior care solutions organization with over 202 offices nationwide and six across Wisconsin. The Senior Care Advisor staff includes credentialed Certified Senior Advisors* (CSA) and National Placement and Referral Specialists* (NPRS). CarePatrol has over 3,000 outstanding online reviews and a Listen360 NPS score of 94. CarePatrol continues to be a valuable resource to support the assisted living industry — and seniors and their families facing challenging transitions of care.

Kim M Seidl, CPRS, (former) Owner and Executive Director, CarePatrol of Greater Milwaukee & SE Wisconsin (Nation's Top CarePatrol Office 2023, 2022, 2021, 2020; Franchisee of the Year) Kim and her husband Todd have owned successful senior home care and placement businesses since 2007. She is an NPRA Certified Placement and Referral Specialist.

Senior Living Foresight, Rethinking Senior Living Sales: The Imperative for a New Paradigm by Jozsef Horvath 3/26/24. 2024 American Health Care Association & the National Center for Assisted Living (AHCANAL), "Facts & Figures." Accessed 4/28/21 Genworth, "Cost of Care Survey: Ranked State Data Tables" Accessed 4/28/21. Senior Housing News, A Place for Mom Cuts Customer Success Team, Pivoting to 'More Direct' Community Strategy by Tim Regan 3/18/24.



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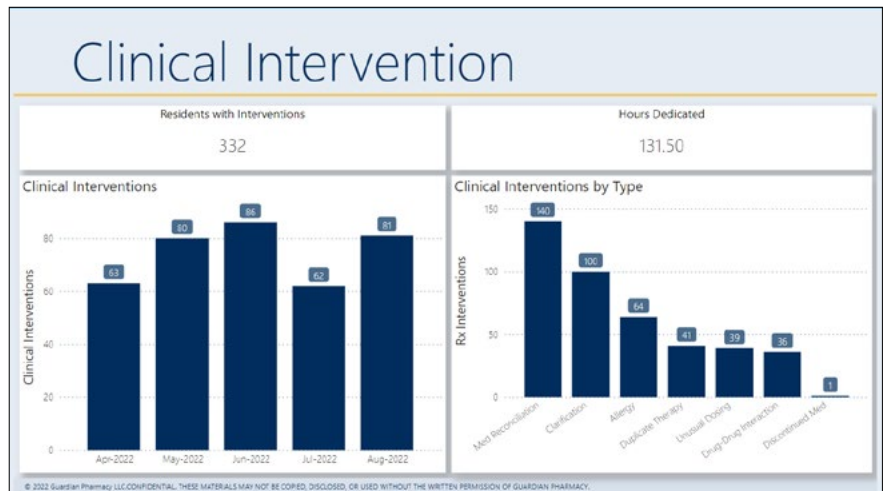
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