



Association of Senior Referral
Professionals of Washington

Annual Report 2017

December 5th



The Association of Senior Referral Professionals of Washington 2017 Annual Report

Executive Board

President 2017

Heidi Sheldon, Options For Seniors LLC

President Elect for year 2018

David Lepsig, Care Patrol Seattle Eastside

Past President 2016

Lisa Doyle, CayCare Inc.

Treasurer 2016-2017

Abby Durr, Silverage LLC

Secretary 2017

Julie Garreis, All About Care

Board of Directors:

Communications Chair

Evan Perrollaz, Cornerstone Healthcare Consulting Inc.

Education Chair

Lisa Satin, The Right Place Senior Options LLC

Ethics and Best Practices

Abby Durr, Silver Age LLC

Legislative Chair

Heidi Sheldon, Options For Seniors LLC

Membership Chair

Diane Lepsig, Care Patrol Seattle Eastside

Past Presidents of ASRP WA

Heidi Sheldon, Options For Seniors LLC	2010 thru 2013	(WA regulated in 2011)
Stan McKenzie, A Change is A Foot	2014	
Abby Durr, Silver Age LLC	2015	
Lisa Doyle, CareCare Inc.	2016	
Heidi Sheldon, Options For Seniors LLC	2017	

Current Members

A1 Senior Care Advisors LLC
A Caring Choice Agency
A Change is Afoot Inc.
Adult Care Placements
Always Best Care
Assisted Living Options
All About Care
Care Patrol Seattle East Side
Care Patrol Greater West Seattle and South King County
Care Patrol Seattle
CayCare Inc.
Concierge Care Advisors
Cornerstone Senior Care Solutions
Dedicated Care Solutions
Graham and Graham
Oasis Senior Advisors
Options For Seniors LLC
Seattle Senior Care Consultants
Serving Our Seniors LLC
Silver Age Senior Housing Referrals
The Right Place Senior Options

Affiliate Members

In-Home Senior Care Solutions LLC
Legal Shield Services
Oregon Senior Referral Agency Association
Provider Reports
Retirement Connection
Stellar Senior Living Washington
Sunrise Senior Living Washington

Mission Statement:

Association of Senior Referral Professionals of Washington is committed to establishing and promoting professional and ethical standards within the senior housing and care referral industry; as well as to those who provide supportive and ancillary services for older and other frail adults within the state of Washington.

A common business interest of all members is to create a unified and consistent voice which promotes, develops and facilitates:

- 1) Ethical standards which create a quality experience for seniors, frail adults, and the people who support them.
- 2) Recommended best practices and the education of members, with a shared goal of improving consumer awareness of options and increasing the ability of consumers to make informed decisions.
- 3) Education to increase the knowledge and skills of members regarding aging, aging related products and services, communication, decision-making and conflict resolution.
- 4) Education to increase consumer awareness of aging, senior housing and care options, effective processes for making life transition decisions, and to improve communication amongst family members, and with health care professionals and insurance carriers.
- 5) A means for consumers, senior housing and care providers, health care professionals, other professionals or community members to provide feedback to the entire referral industry.
- 6) The use of referral professionals as a means of making effective use of time, energy and resources for consumers and senior housing and care providers.
- 7) Transparency, disclosure, accuracy of information, and effective, recommended business practices within the senior housing and care referral industry.
- 8) Protection of consumers by communicating residents' rights, current and future RCWs & WACs impacting consumers.
- 9) Collaborative opportunities for consumers and members of the association to have a voice in future legislation and regulation regarding senior housing and care services.
- 10) Protection of consumers by communicating the option to file complaints to the Ombudsman, The Department of Social & Health Services, Adult Protective Services, The Attorney General, and other regulatory or social service agencies.

Message from the President 2017

Heidi Sheldon, Options For Seniors LLC

This past year was full of great excitement and growth in our industry especially on a national level. The Fair Market Initiative of 2016 became the Agents For A Fair Market Place 2017 and from there the national meeting of referral professionals in Arizona in March of 2017. Then the development of the Families Have Choice Coalition and the national survey. The outcome of the national survey was clear that a National Association needed. As of, July of 2017, the National Placement & Referral Alliance www.NPRAlliance.org was officially launched. The objectives of the National Association are to promote the general advancement of the Senior Placement and Referral Industry and profession. To promote public understanding and education around our industry to agents, medical professionals, families and the general public. To provide a forum for the exchange of information between agents to improve our industry. Facilitate and promote a National Code of Ethics, Best Practices and Professional Responsibility. Looking forward NPRAlliance is working on a National Certification Program for our industry and possible legislation for the consumer to be able to "Opt Out" on behalf of the provider, with the lead generating dot.com company.

The national organization had an immediate impact on our industry. They educated the FTC on the practices of the major on-line companies. The FTC just rejected the merger of Caring.com and APFM requiring the firm that acquired them to divest Caring.com from the deal. <https://www.ftc.gov/news-events/press-releases/2017/11/parties-agree-divestiture-senior-living-facilities-referral-service>.

It is truly, my pleasure to represent our Association of Senior Referral Professionals of Washington on the National Board. I look forward to keeping you all apprised of the progress in the years to come.

Special thanks to all the Board members who have been there consistently throughout this year. We had a full schedule of education, initiatives, coalitions, national survey and helped in launching a national association, we close the year 2017 as the only state in the Union who has regulated referral professionals. Oregon, is joining us, they passed legislation in 2017 and it goes into effect as of July 2018. We welcome working closely with them on the National issues.

I am looking forward to seeing the growth that will come next year to our Association under the leadership of David Lepsig, I encourage all of you to get involved with a committee and engage with the National Association and join today.

WWW.NPRAlliance.org

Committee Reports 2017

Communication

Evan Perrollaz, Cornerstone Healthcare Consulting, Inc.

Focus for 2017 has continued to center on further enhancing the website (www.asrpwa.org) for additional content and functionality, to make it easier-to-maintain member list, additional resources and speaker presentations. Additionally, we continued to look for ways to drive further awareness for the association across the industry. Communications also included a ASRP Face book page; be sure to like us today, that keeps members and prospective members up to date with the continuing events. If you have an industry feel good story please share on our page. We want to celebrate our industries successes.

Education

Lisa Satin, The Right Place-Senior Options LLC

Our goal is to increase the knowledge and skills of our industry through education, communication and networking. We started off our year on January 11th with our annual meeting at Mercer Island House with our annual report and vote for new board. As well as providing education on the Fair Market Initiative presentation by Chuck Bongiovanni, with CarePatrol.

The April 11th membership meeting at Village Green, in Federal Way. The topics covered included an overview of the March 2017 Arizona meeting of referral professionals across the country by Chuck Bongiovanni and David Lepsig, with CarePatrol. Best Practices were reviewed by Abby Durr, Silver Age Senior Housing and Referrals. You can find our Ethics and Best Practices on our website www.asrpwa.org. Heidi Sheldon, Options For Seniors LLC, gave a legislative update that included Bill updates. See Legislative year in review for Bill details. Thank you, Heidi for commitment to helping keep us informed of the ongoing senior issues in Olympia. Then our special guest John Ficker with the Adult Family Home Association, shared with us the needs and feelings of Adult Family Home Providers, and we are looking forward to a better working relationship with the Adult Family Home Association in the years to come. Diane Lepsig, gave a membership update regarding membership drive efforts and welcoming all to participate in reaching out to invite others to join ASRP.

July 18th we had our summer social at Chateau Bothell Landing. Speakers included David Lepsig with an update on the Fair Market initiative, the development of the Families Have Choice Coalition and he shared the results of the national survey. Diane welcomed new affiliate members Sunrise Senior Living. The code of ethics reviewed and Membership committees working together with Ethics and Best Practices committee to educate new associate members. Thank you, Abby and Diane for all your follow thru with education of our new members. Heidi gave a brief update of the on conclusion of the Legislative session on June 30th 2017. See Legislative year in review for Bill details.

October 10th at Northgate Plaza, Heidi Sheldon presented the National Placement and Referral Alliance NPRA. The National Alliance web site and a power point of the issues on a national level were presented. Heidi asked us all to join the National Placement & Referral Alliance www.NPRAlliance.org. Also, requested members to post on their personal Facebook the communication study, www.MyParentsSeniorCare.com. Heidi did a call to action asking people to get involved in committees next year for www.ASRPWA.ORG. Guest speaker was Robin Block with Block Beta, topics were strategic and creative services to help business succeed. We were also provided an educational opportunity with Julie Garres with Senior Activity Solutions. The therapeutic, recreation, cognitive and emotional well-being centered activities. How that differs from activities calendars in larger assisted living community settings. Was truly informative, fun show and tell!

Providing relevant education for our membership will continue to be a priority for ASRPWA. We look forward to your participation if you have an education idea please feel free to email me directly Lisa Satin at lisa@trpso.com.

Ethics/Best Practices

Abby Durr, Silver Age, LLC

In 2017, the Ethics and Best Practices committee continued to refine the code of ethics created in 2015 by presenting it at our April 2017 meeting. The presentation was in discussion style. We received some good feedback and continue to be open to input. In 2017, we also formed an Ethics and Best Practices subcommittee to further the development of standards for our members with special focus on affiliate members. The first goal of the subcommittee is to establish minimum criteria for affiliate members and add a few more steps to the affiliate membership process. We have also added more requirements to the membership application process for referral agencies. For example, we want potential members to attend a meeting before applying and set up a coffee date with the membership committee before being approved. Over the next few years we expect the code of ethics to continue to be an evolving document.

Legislative

Heidi Sheldon, Options For Seniors LLC

We actively advocated with legislators along with the Washington Health Care Association WHCA membership on behalf of the Senior Referral industry during Senior Lobby Day in Olympia February 2017. We also, actively advocated with the development of the National Placement Referral Alliance.

2017 the bills in Review

ASSISTED LIVING: During the 2017 legislative session, the WHCA team worked to improve current funding for Medicaid-contracted providers, and to set the stage to revise the current payment methodology to more accurately reflect the cost of care and services in the assisted living setting. They were successful on all fronts.

Medicaid Vendor Rate Increase: Service providers for individuals with long-term care needs, or individuals with developmental disabilities, will receive vendor rate increases of 2.0% on July 1, 2017, and an additional 2.0% on July 1, 2018.

Minimum Wage Enhancement Funding for Medicaid Contractors: In addition to a vendor rate increase, assisted living contracted providers will see rate increases tied to the statewide minimum wage increase. A 3% increase will be provided in year one of the biennium, and an additional 1.8% will be provided in year two.

Assisted Living Medicaid Rates Parity: Last year the Legislature provided a 2.5% vendor rate increase for Medicaid-contracted providers in assisted living, the first increase in a decade. At the same time, adult family homes serving the same clients received a 10% vendor rate increase for the biennium, due in large part to the collective bargaining process afforded that sector of community care. WHCA lobbying efforts focused on the lack of rates parity, and on DSHS practices that permit payment for services outside the daily Medicaid rate for adult family home clients, but not assisted living residents. WHCA was successful in advocating for a budget proviso requiring a DSHS study related to the lack of equal payment; that proviso was included in the Senate budget and the final consensus budget. With the passage of this budget proviso, WHCA is well positioned to argue for assisted living rates parity going into the 2018 legislative session.

Redesigning the Medicaid Payment System for Assisted Living: DSHS is required to convene a workgroup including associations and the LTC Ombudsman program to redesign the Medicaid payment methodology for assisted living, enhanced adult residential care, and adult residential care contracts. The workgroup is required to provide a report to the Legislature by November 30, along with a timeline for implementing the new system.

SKILLED NURSING FACILITIES: Work was focused on Medicaid payment reform continued during the 2017 legislative session. This was a critical year for ensuring that a promised rates rebase would be adopted for skilled nursing facilities, and for seeking a permanent repeal of rates penalties on skilled nursing facility patients. We were successful on each of these fronts, and were able to secure additional dollars for minimum wage increases, and we shaped legislation to ease staffing issues for providers serving residents with behavioral rather than health care issues.

Minimum Wage Enhancement Funding: Funding is provided for a minimum wage enhancement for skilled nursing facilities. The funds are allocated in an across-the-board increase for all rates that equates to \$.29/per resident day. While this is a modest appropriation, we appreciate the recognition that the statewide minimum wage initiative drove up costs for long term care providers.

Elimination of Acuity Penalties & Payment Improvements for Behavioral Health Clients: WHCA priority legislation, SB 5715, is fully funded in the budget. The legislation provides that residents in RUG codes PC1 through PE2 are now exempt from 13% penalties. Residents in the RUG codes PA1 through PB2 are still subject to the penalty, unless a resident also presents with behavioral RUG codes. Additional exceptions to the

penalty are permitted for residents with limited placement options in the community. Additionally, DSHS is authorized to adjust upward the weighted RUG scores for the BA1 through BB2 codes in the behavioral and cognitive performance group. The direct care component of the nursing home rate is capped at 118% of the direct care allowable costs in the base rate year. Nursing homes that are below the statutory minimum staffing standard of 3.4 hours per resident day are not subject to the direct care cap.

Geriatric Behavioral Health Worker Training: The legislation allows completion of the behavioral health curriculum developed by DSHS to substitute for the experience requirement for becoming a geriatric behavioral health worker in a skilled nursing facility. The law also removes the requirement that a geriatric behavioral health worker have either a bachelor's or master's degree in social work.

Membership

Diane Lepsig, Care Patrol

This past year the Association membership has welcomed; Concierge Care Advisors, Graham and Graham, and Oasis Senior Advisors as members, for a total of 21 referral companies. The new affiliate members are; Sunrise Senior Living Washington (Bothell, Northgate, Edmonds, Lynnwood, Mercer Island and Bellevue) and Steller Living (Overlake Terrace and Farrington Court). We currently have total of 28 members, seven are affiliate members. Our goal is to grow our membership through the use and exposure of our association brochure, Facebook page and web-site by our existing membership. I encouraged you to join the efforts of the membership committee.

Financials for the year

Abby Durr, Silverage, LLC

In 2017, ASRP generated funds through membership dues. Membership dues are \$200 per year for a referral company. Affiliate membership dues are \$100 per year. Affiliate members offer supportive services and products to the senior housing and care industry.

Our fiscal year is January 1 - December 31. Our bank balance on December 5, 2017 is \$2,215.95. Membership dues in 2017 generated \$3,200. Notable operating expenses are as follows:

- Website Maintenance: \$171.87
- Marketing & Advertising: \$889.22 (brochure & education printing)
- WHCA Membership: \$500.00
- Misc. \$10.00
- Legal fees: none this year
- Speaker fees: \$100
- Insurance: \$917.00 (to be paid mid December 2017 for 2018 coverage)

Current bank balance is \$2,215.95 and is the only asset of the Association of Senior Referral Professionals of Washington.



Association of Senior Referral
Professionals of Washington

9224 Slater Ave NE Suite 215
Kirkland, WA 98033
www.ASRPWA.org