



Association of Senior Referral  
Professionals of Washington

# Annual Report 2018

December 11th



# The Association of Senior Referral Professionals of Washington 2018 Annual Report

## Executive Board

### **President 2018**

David Lepsig, Care Patrol Seattle Eastside

### **President Elect for year 2019**

David Lepsig, Care Patrol Seattle Eastside

### **Past President 2017**

Heidi Sheldon, Options For Seniors LLC

### **Treasurer 2016-2018**

Abby Durr, Silverage LLC

### **Secretary 2018**

Open Position

## Board of Directors:

### **Communications Chair**

Greg Cranford, Dedicated Care Solutions

### **Education Chair**

Lisa Satin, The Right Place Senior Options LLC

Steve Garrett, Care Patrol West Seattle

### **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	
David Lepsig, Care Patrol Seattle Eastside	2018	

## **Current Members**

A1 Senior Care Advisors LLC  
A Caring Choice Agency  
A Change is Afoot Inc.  
Adult Care Placements  
Assisted Living Options  
Aves Senior Care LLC  
Care Patrol Seattle East Side  
Care Patrol Greater West Seattle and South King County  
Care Patrol Seattle  
CayCare Inc.  
Concierge Care Advisors  
Dedicated Care Solutions  
Forever Care Services  
Graham and Graham  
Oasis Senior Advisors  
Options For Seniors LLC  
Pinnacle Senior Placements, Inc.  
Serving Our Seniors LLC  
Silver Age Senior Housing Referrals  
The Right Place Senior Options  
Thrive Senior Advisors

## **Affiliate Members**

All About Care  
All In-Home Senior Care Solutions LLC  
Hospitality Home Care  
Ideal Adult Family Homes  
In Home Senior Care  
Legal Shield Services  
Madison House a Koelsch Senior Community  
Oregon Senior Referral Agency Association  
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 2018

*David Lepsig, Care Patrol*

2018 marks the first year of my tenure as president of the Association of Senior Referral Professionals. ASRP added new members and saw a few retire and we fostered more strategic relations for our members. Nationally, new laws were passed and an effort to regulate our industry is gaining momentum with several more states considering new laws to regulate our profession.

The ASRP 2018 membership is up from 2017. We now have 21 Referral Professionals and 11 affiliate members. The details of our growth are included in the membership report later. An Affiliate member board position was introduced for 2019.

The ASRP attended two trade shows representing the Senior Referral Professionals in the state. In March we were exhibitors at the Adult Family Home Nurses Association conference, in Mount Lake Terrace. In October we were exhibitors at the WA Senior Citizens Foundation annual conference in Tacoma.

Efforts from our Legislative Committee's trip to Olympia in February resulted in a meeting with the WA Attorney General's office. Chuck Bongiovanni, NPRA President, traveled at their expense and presented the NPRA research on the negative impact on-line agencies have on vulnerable seniors. Our attending members presented complaints from WA residents, collected from our members. The AG's office is reviewing the information.

Nationally, our profession is under legislative pressure. Our neighbors to the south are now the second state to enact a law regulating our profession. Oregon's new law H.B. 2661 went into effect on July 1, part of Oregon's law includes a registry that requires agents to pay \$750 for a two-year registration. Liz Fisher, President of OSRAA presented the new law to our members in October.

In Arizona, Gov. Doug Ducey signed and implemented H.B. 2529. The new law requires referral agencies to disclose the nature of the business relationship between the agency and a community, including whether the two entities share common ownership or control, as well as the fact that the community pays a fee to the agency for the referral. The amount of the fee that an assisted living community will pay the agency, or a good-faith estimate, must be disclosed before or at the time of a resident's move-in.

Also, under the new law, referral agencies must provide assisted living communities and residents or their representatives with electronic or paper copies of the disclosures, and assisted living communities must keep a copy of each disclosure on file. A community must wait to pay a referral fee until it has received the related disclosures. Referral agencies that don't comply with the law can be fined up to \$1,000 per violation.

With regulation passed or proposed in several states the National Placement and Referral Alliance (<https://npralliance.org>) began the process of self-regulating our industry. In August, the NPRA and Professional Testing, Inc. (<https://www.proftesting.com>) hosted a

team of 11 industry professionals in Denver CO. Representing WA State were ASRP members Lisa Doyle of CayCare (2016 ASRP President), Michelle Graham of Graham and Graham and myself. We met to establish a national certification program. The meeting was facilitated by Dr. Cynthia D Woodley.

For three days we conducted a Job/Task Analysis to properly serve a senior and their loved ones. This resulted in a Planners Job Description and a DACUM Chart to establish standards for our industry.

The Job Description reads:

*“A Certified Placement and Referral Specialist is an educator and advocate, who is knowledgeable about the resources of their local communities. A Certified Placement and Referral Specialist assesses and prioritizes the unique needs of each client and family, researches solutions, and provides them with information on the options, laws and system. The Certified Placement and Referral Specialists presents vetted care providers, arranges tours, explains finances, and personally guides each client through the process, facilitating the selection of a customized care solution.”*

Sounds accurate!

The next step is a survey of industry professionals to rate the DACUM Chart for relevance and value. Revisit the process once the survey is completed for modifications based upon survey scores. A different team will meet to create a 100-question exam. Each question will have three variants and a computer will randomly select the exam questions for each participant. NPRA will seek additional input from member volunteers in 2019 to help finalize the process. If you want to participate in this important industry milestone, contact the NPRA.

[WWW.NPRAlliance.org](http://WWW.NPRAlliance.org)

### **Special Thanks:**

The Association of Senior Referral Professionals ([www.ASRPWA.org](http://www.ASRPWA.org)) is an all-volunteer organization. At first, I did not realize the amount of time this takes, but I am happy to contribute. Our committees make the Association and we are always open to new volunteers. Several committee members have volunteered their time since the ASRP was formed in 2010.

A special thanks to Lisa Satin, The Right Place Senior Options, for her volunteer time as the Education Committee Chair. Lisa has been responsible for “packing them in”. She suggested great topics, located outstanding speakers and secured the venue for our meetings. Lisa is one of the original members of the ASRP and has dedicated personal time to our profession since 2010. She has decided to step down as Education Chair and focus more time on her own business and family.

Abby Durr, Silver Age, has been the past President of the ASRP (2015), responsible for the Code of Ethics and has been our Treasurer since Diane and I joined the Association. Abby recently added to her family and will step down as Treasurer in 2019. She represents our

industry with professionalism and grace and will be missed. She told me she will be available for volunteer work in 18 years when the youngest is in college! Thanks Abby, for all you have done for our industry and Association.

Finally, I need to call out the efforts of our past President and Legislative Committee Chair, Heidi Sheldon. Heidi's efforts secured our meeting with the AG's office. Her direction on protocol and Roberts Rules of Order have been invaluable to me in 2018. The time Heidi volunteers for our profession is matched by few others.

I would like to say a special thanks to each of you for all that you have done for Referral Professionals in WA State. We look forward to seeing Lisa and Abby at future meetings and working with Heidi in 2019.

2019 will be the ASRP's 10<sup>th</sup> anniversary. I look forward to and my second term as President and the start of our next 10 years. Ask your colleagues to join the ASRP and volunteer to help our profession.

## **Committee Reports 2018**

### **Communication**

#### ***Greg Cranford, Dedicated Care Solutions***

We had three avenues of communication focus for 2018, website, Facebook and email blasts. The website updates were minimal as it had a bit of a learning curve. Membership lists were maintained accurately. Changes to the new member application were completed and uploaded. Facebook is becoming a more important form of communication. How this is managed has been in a bit of flux. It's been a great way to reach a larger audience directly and should be a greater focus in 2019. Email blasting programs have been utilized more. This has been another change for 2018 and we are trying to grow our email list. Blasts for events and updates are going out monthly and a great foundation should be in place for more growth.

### **Education**

#### ***Lisa Satin, The Right Place-Senior Options LLC***

In keeping with ASRP's mission, we strive to increase our knowledge in all aspects of our senior's needs through educational opportunities for our members. These opportunities include discussing our RCW 18.330 with new members, keeping lines of communications open to our members so they can stay abreast of the rules and guidelines surrounding our industry, modelling Ethics and Best Practices in the community, and offering quarterly conferences with industry relevant speakers for the benefit of our membership and affiliate members as well as networking.

The April 10<sup>th</sup> meeting was very well attended and hosted by Overlake Terrace in Redmond WA. Our speaker was Jill Leon with Providence Elder Place, also known as the

PACE program. It is a “managed” Medicaid non-profit program that offers seniors an alternative to Medicaid. This was very useful information for our membership to be able to help our clients find affordable housing. We heard a legislative report from our Legislative chair, Heidi Sheldon who keeps us informed on senior industry relevant legislative happenings in Olympia throughout the year. We also had an update on the Fair Market Initiative by our President, David Lepsig as well as his report from our board meeting.

July 17<sup>th</sup> was our Summer meeting hosted by the Lakeshore retirement community in South Lake Washington, Seattle. We heard a report from our president, David Lepsig who also recapped our morning board meeting for the general membership. Our speakers were all representatives or nurses from our local Hospice companies. We were fortunate to have Kline-Gulland, Kindred, Providence, Hospice of the Northwest and CHI Franciscan attend our panel discussion. They all answered so many questions and explained many things our clients frequently ask about. This was a rich educational opportunity for us to soak up so much knowledge and experience that is relevant to our clients.

October 9<sup>th</sup> was hosted by The Meridian at Stone Creek in Milton, WA. We heard a report from our President, David Lepsig at the beginning of the conference and then heard from our speaker, Liz Fischer, the President of the Oregon Senior Referral Agency Association, OSRAA. Liz was gracious to come to Washington to speak to our ASRP referral association about their new state laws surrounding senior housing referral agents. We realized that although our laws (rules) are quite similar, Oregon referral agents need to be registered with their DSHS, and ours do not. She was a valued speaker and we had a lively discussion sharing between our very similar organizations.

December, 11<sup>th</sup> will be our annual meeting where we will discuss our annual report and vote on new board members for 2019. This final 2018 meeting will be hosted by Madison House in Kirkland, WA. Abby Durr or David Lepsig will welcome our attendees and start the introductions. Abby Durr will then lead a discussion on Best Practices in our industry and Review some highlights from RCW 18.330. David will then facilitate or Annual Report by having each board member read their report. We will have nominations for next year’s board by our board committee, Heidi Sheldon and David Lepsig. During lunch, Chandra Lewnau of WALL Law Group will speak about the new rules for the VA Aide and Attendance benefit. This is a timely topic due to the very recent changes in the VA benefit program in which many of our clients participate.

Our membership appreciates topics that are relevant to our work in the senior industry. Our Education chair will continue to provide such speakers as a benefit of membership, and in the interest of increasing our knowledge and skills so we can continue to grow in our profession.



## **Ethics/Best Practices**

***Abby Durr, Silver Age, LLC***

In 2018, the Ethics and Best Practices committee drafted a code of ethics for businesses who join ASRP as Affiliate Members. We hope to have this finalized by the beginning of 2019. We plan to review the Ethics and Best Practices Code for members and the Affiliate member code draft by the end of the year 2018. We are excited about increasing our number of affiliate members and gathering their input about the new Affiliate Member Code of Ethics. We plan to recruit 3 new Ethics and Best Practices Committee members and have an Ethics and Best Practices committee meeting at the beginning of 2019.

## **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 21-23<sup>rd</sup> 2018. We also, attended the Washington State Senior Citizens' Lobby event where I was able to make an introduction of ASRP WA to Bob Ferguson, Attorney General for the State of Washington. We provided him with education about our industry and began a dialog with the Attorney Generals' office that led to a meeting in June of 2018.

## **2018 the bills in Review**

The supplemental state spending plan was adopted for the period of July 1, 2018, through June 30, 2019, and fully funds a scheduled skilled nursing facility rebase, as well as provides limited relief for assisted living Medicaid providers with 60 percent or greater Medicaid population.

**SNF Rebase:** The SNF rebase moves the budget dial for nursing homes from the current level of \$200.47 to \$216.46 for 2019. With the rebase, Medicaid rates are updated to 2016 costs for the 2019 fiscal year.

**AL High Census Medicaid Funds:** For assisted living Medicaid providers, the budget provided additional funding for those providers serving a 60 percent or higher Medicaid census. The additional \$2.2 million total funds will result in a rate increase of approximately \$2.25 per resident day. The additional funding is appreciated yet there is concern about driving dollars to the newly-adopted Medicaid rates methodology in next year's 2019-2021 operating budget.

**AL License Fees:** Assisted living license fees are increased from \$106 to \$116 in the supplemental spending plan. DSHS cited the increase in complaint investigations as the rationale for increasing fees. Under state law, providers are required to bear the cost of regulatory oversight by DSHS Residential Care Services.

**LTC Workforce Study:** The supplemental budget also includes a proviso requiring the Nursing Quality Care Assurance Commission to convene a workgroup to address the LTC staffing crisis in skilled nursing and assisted living centers. The proviso requires the

Commission to convene and facilitate a workgroup to assess the need for nurses in long term care settings and to make recommendations regarding worker recruitment, training, and retention challenges for long term care providers in the sectors of skilled nursing facilities, assisted living facilities, and adult family homes. The work group must:

- Determine the current and projected worker vacancy rates in the long-term care sectors compared to the work load projections for these sectors;
- Develop recommendations for a standardized training curriculum for certified nursing assistants that ensures that workers are qualified to provide care in each sector, including integration into the curriculum of specific training for the care of clients with dementia, developmental disabilities, and mental health issues;
- Review academic and other prerequisites for training for licensed practical nurses to identify any barriers to career advancement for certified nursing assistants;
- Identify barriers to career advancement for long term care workers; and
- Evaluate the oversight roles of the department of health and the department of social and health services for nurse training programs and make recommendations for streamlining those roles.

**Personal Needs Allowance:** The personal needs allowance (PNA) for residents relying on Medicaid is increased to \$70/month for skilled and assisted living beneficiaries. The PNA will be adjusted annually in January by the percentage of change in the cost of living adjustment to Social Security benefits.

**LTC Trust Act:** The Legislature allocated an additional \$200,000 to update the Milliman actuarial study that determined the feasibility of a worker-funded long-term care benefit. While the legislation to implement the program did not pass this year, there is continued momentum for adopting a \$100/day long term care benefit. The Legislature allocated an additional \$100,000 for a work group to develop recommendations on how family caregivers could be compensated for providing care under this program.

**Eight Bed AFH:** Adult Family Home Council of Washington State introduced legislation to allow certain adult family homes to increase to eight beds. Although the legislation did not pass in the 2018 because of concerns from the Fire Marshall. The legislation is expected to be amended to address those concerns on 2019. This increases to eight beds will provide resources and creates a larger economy of scale for homes serving many Medicaid clients in Washington.

## **Policy Legislation**

**HB 2515 Medicaid Rates Methodology for AL:** WHCA's priority legislation to establish a statutory framework for Medicaid rates passed the Legislature and signed into law by the Governor. DSHS estimates the new methodology will cost an additional \$100 million, and will be a multi-year, staged implementation plan to help achieve full funding for the new methodology. This legislation took many years to achieve, we look forward to the difference this legislation will make in creating opportunity for housing options for Medicaid clients.

**HB 2750 Quality Measures and Fines for Assisted Living:** Legislation championed by the LTCOP passed the Senate and House floors and the Governor's Office for signature. The legislation requires DSHS to convene a workgroup to make recommendations by September 1, 2020, for a quality metric system, a process for monitoring and tracking performance, and a process for informing consumers. The legislation also requires DSHS to provide information to consumers about assisted living facilities and site visits and inspections, and uses a multi-year phased-in approach to increase assisted living civil penalties to up to \$3,000 per incident. Skilled nursing facilities and adult family homes are already subject to fines at the \$3,000 level.

### **Membership**

#### ***Diane Lepsig, Care Patrol***

This past year the Association membership has welcomed; Aves Senior Placement, LLC, Pinnacle Senior Placements, Inc and Thrive Senior Advisors as members, for a total of 21 referral companies. The new affiliate members are; All About Care, All In-Home Senior Care Solutions LLC, Hospitality Home Care, Ideal Adult Family Homes, In Home Senior Care and Madison House.

We currently have total of 32 members, eleven are affiliate members. Our goal is to grow our membership through the use and exposé 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 2018, 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 and are non-voting members of ASRP.

Our fiscal year is January 1 - December 31. Our bank balance on Jan. 1, 2018 was \$1,997.22. Membership dues in 2018 generated \$4182.30 (as of 12/5/2018). Notable operating expenses were as follows:

- Website Maintenance: \$187.86
- Marketing & Advertising: \$748.39
- WHCA Membership: \$500.00
- Conferences (AFNA, Sr Citizens Foundation): \$600
- Insurance: Lee Insurance Services 939.00 (December 2018), Liberty Mutual 268.00 (January 2018)
- Speaker fees: 110.00
- Secretary of State Filing: 10.00

Current bank balance is \$2798.57 and is the only asset of the Association of Senior Referral Professionals of Washington.



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