



Association of Senior Referral  
Professionals of Washington

# Annual Report 2019

December 10<sup>th</sup>



# The Association of Senior Referral Professionals of Washington 2019 Annual Report

## **Executive Board**

### **President 2018 - 2019**

David Lepsig, CarePatrol Seattle Eastside

### **President Elect for year 2020**

Daphne Davis, Pinnacle Senior Placements, Inc.

### **Past President 2017**

Heidi Sheldon, Options For Seniors LLC

### **Treasurer 2016-2019**

Abby Durr, Silverage LLC

### **Secretary 2019**

Rob Young, Oasis Senior Advisors

## **Board of Directors**

### **Communications Chair**

Greg Cranford, Dedicated Care Solutions

### **Education Chair Co-Chairs**

Daphne Davis, Pinnacle Senior Placements, Inc.

Lauren Ward, Thrive Senior Advisors

### **Ethics and Best Practices**

Abby Durr, Silver Age LLC

### **Legislative Chair**

Heidi Sheldon, Options For Seniors LLC

### **Membership Chair**

Diane Lepsig, CarePatrol

## **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, CayCare Inc.	2016
Heidi Sheldon, Options For Seniors LLC	2017
David Lepsig, CarePatrol Seattle Eastside	2018 – 2019

## **Current Members**

1<sup>st</sup> Place Sr Housing  
A1 Senior Care Advisors LLC  
A Caring Choice Agency  
Adult Care Placements  
Assisted Living Options  
CarePatrol Eastside  
CarePatrol Seattle  
CayCare Inc.  
Concierge Care Advisors  
Dedicated Care Solutions  
Family Values Adult Placement Agency  
Oasis Senior Advisors – King County  
Oasis Senior Advisors - Vancouver  
Options For Seniors LLC  
Pinnacle Senior Placements, Inc.  
Silver Age Senior Housing Referrals  
The Right Place Senior Options  
Thrive Senior Advisors

## **Affiliate Members**

All About Care  
Bellevue Manor Adult Family Home  
Hospitality Home Care  
Ideal Adult Family Homes  
In Home Senior Care  
Madison House a Koelsch Senior Community  
MBK Senior Living  
Oregon Senior Referral Agency Association  
Retirement Connection  
Stellar Senior Living Washington  
Sunrise Senior Living Washington  
The Lakeshore

## **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 2019

*David Lepsig, CarePatrol*

2019 marks the final year of my tenure as president of the Association of Senior Referral Professionals. ASRP added new members and saw a few leave or retire. 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 2019 membership is up from 2018. We now have 18 Referral Professionals and 12 affiliate members. The details of our growth are included in the membership report. An Affiliate member board position was introduced for 2019 and remained open after our nominee changed companies and was no longer available to complete the term.

Locally the ASRP represented our industry to the WA Attorney General's office. A follow-up to our 2018 meeting informed us that the complaint filed during our meeting was still in progress. Shortly after receiving this information McKnight News reported that A Place For Mom has agreed to settle for \$6 million a punitive class action lawsuit that claims the company violated the Telephone Consumer Protection Act.

The ASRP charter is focused on education that supports best practice for the Senior Referral Profession in WA State. In September we sponsored the COPS (Coordinators of Patient Services) luncheon. We teamed with the WA Attorney's General office and spoke again about the problems related to on-line referral agencies. My presentation was the introduction to the Attorney's General office informing the meeting about how to file a complaint when an agency violates RCW 18.330. Elena G. Huizar is the Outreach Services Supervisor in the Consumer Protection Division of the Washington State Office of the Attorney General. Elena presented the process and directed attendees to the AG's web site and how to file a complaint.

Nationally, our profession is under legislative pressure. Our neighbors to the south are the second state to enact a law regulating our profession. Below are two states regulations.

## **Oregon**

Oregon's new law H.B. 2661 went into effect in 2018, 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 law to our members in October of 2018.

## **Arizona**

A H.B. 2529 was implemented and the following rules are enacted:

1. 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.

2. 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 2018, 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), and myself. We met to establish a national certification program. The meeting was facilitated by Dr. Cynthia D Woodley. The testing process is nearly complete. Meetings were held in 2019 to finalize the 100-question examination. The Certified Senior Referral Professional test should become a reality in 2020. I encourage all industry professionals to check out: [www.NRPEAlliance.org](http://www.NRPEAlliance.org).

I want to thank my Board Members who volunteered to help improve our profession. The team met monthly, we held 4 great Association meetings and one public speaking opportunity at "COPS" to help educate our professional colleagues on the laws in WA State. Great work and dedication to our industry from all the professionals involved with the ASRP Board, and a ton of volunteer hours. A heartfelt thanks to everyone for all that you have done.

It has been an honor to be the President of the ASRP for the past two years. I feel that our Association is stronger and better organized as my tenure ends. We had a great board in 2019 that spent countless hours helping our fellow WA State Referral Professionals. I now assume the role of past president and I will continue to be involved in the ASRP. I look forward to the growth of our Association under the capable leadership of Daphne Davis and I look forward to seeing you at a meeting in the future.

David Lepsig  
CarePatrol

# Incoming President's Message

*Daphne Davis, Pinnacle Senior Placements, Inc.*

Hello to all our Members,

The effect we have as professionals in the senior care industry is far reaching and amazing. Whether your interaction is with other professionals, families or our beloved seniors, you truly make a difference! Thank you for all YOU do! The “ripple effect” of our daily decisions and actions is wide and truly unknown. It's from this understanding that I have chosen to serve you, the Association of Senior Referral Professionals of Washington (ASRP) membership.

I am Daphne Davis, the in-coming President for 2020. I have not yet met all the members, so please indulge me for a moment of introduction. I have worked in the senior care industry since 1999 starting as the administrator of 3 adult family homes that grew to 8 homes. At that time, I had 2 preschool-age boys at home and had no idea that my energy could also incorporate my love to contribute to the care of our seniors. But I did and I fell in love with our industry! From there I chose to work in the placement profession. The last 5 years I have been the owner of Pinnacle Senior Placements.

For 2020, the year of crystal-clear vision, let's start by recognizing our past leadership. We have been blessed with incredible leadership in the formation and growth of ASRP since 2010 to present day 2019. Every person in their leadership role has had a profound contribution in bringing us to where we are today; a vibrant and professional organization. It is because of this attention given to professionalism that we can give added focus to education on RCW 18.330 and our Ethics and Best Practices document. Education has always been a cornerstone of ASRP; now we are solidly established and ready to have a “ripple effect” that we may not even be able to envision.

It is my belief the Board of Directors exists to serve you, the membership. My hope is that you regularly engage your Board to let us know specifically what you want with your ASRP membership and, how we can best support you in the growth of your business and professional relationships.

I envision ASRP doubling its membership with the support of each of you inviting a new member. This is possible through joining forces to make our collective mission one to serve the senior care industry. Our “ripple effect” is wide and truly unknown! Our 20/20 vision is set on seeing how RCW 18.330 and our Ethics and Best Practices can continue to guide us to prosperity and healthy relationships.

I thank you all for past, current and future support, and trusting me to continue guiding us as we learn how to effectively and ethically let our “ripple effect” reach out in our industry. 2020, the year of crystal-clear vision is yours!

# Committee Reports 2019

## Communication

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

In 2019 the focus was on updating website content. Membership application, code of ethics and other internal documents were updated and posted to the website. We also kept the home page updated with quarterly meetings and links to hosting communities and guest speakers. An additional webpage was created to track all previous meetings and speakers. Other communication avenues such as Facebook has only been minimally used and still needs more work on how to best be utilized. Email blasting has been handled by David Lepsig and that has worked well to directly send updates to our current contact list. Brochures were redesigned in 2019 so we have accurate information to hand out in person and for marketing events. A new banner is also being ordered to best communicate our message during large events. We will continue to update and change the website based on needs to ensure clear and impactful communication going forward.

## Education

### ***Daphne Davis, Pinnacle Senior Placements, Inc. Co-Chair***

### ***Lauren Ward, Thrive Senior Advisors Co-Chair***

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 meetings with industry relevant speakers for the benefit of our membership and affiliate members as well as networking.

The April 9th meeting was very well attended and hosted by Farrington Court, Kent WA. David Lepsig opened the meeting with Abby Durr, from Silver Age, reviewing the Ethics and Best Practices document and the 2019 revisions. Our guest speaker was Alyssa Arley from A2Z Services. Alyssa is a consultant to the Adult Family Homes in WA State, and she is a former provider. She provides weekly podcasts to help the providers succeed. Alyssa discussed the challenges of launching a new AFH and the substantial regulations involved. We discussed the best way to partner with AFH providers and how the ASRP members can create the best relationship with providers.

July 17th was our Summer meeting hosted by the Aegis Gardens, Newcastle WA. We heard a report from our president, David Lepsig who also recapped our morning board meeting for the general membership. Our speaker, Patricia Hunter, is the WA State Ombudsman. Patricia presented an important subject that we deal with on a weekly basis; "Who Decides". She reviewed the process of Power of Attorney and other related legal documents that are required to make decisions for love ones that are incapacitated. This is our summer meeting, so we had time to network with our fellow professionals in a beautiful community.



September 10th was hosted by GenCare, The Lodge at Eagle Ridge, WA. We heard a report from our President, David Lepsig at the beginning of the conference. We had Karin Taifour, MA LMHC GMHS, of Aging Care Consultation Services, as our speaker. Karin aids older adults and their families as well as professionals. Karin's presentation focused on how to work better with care managers and discharge planners to achieve a better placement when there are behaviors, and when it is time for a move to an elevated dementia or mental health setting. She offered great insight and is a resource that we all need in the industry.

December, 10th will be our annual meeting where we will discuss our annual report and vote on new board members for 2020. This final 2019 meeting will be hosted by MBK at The Belletini Bellevue, WA. David Lepsig will welcome our attendees and start the introductions. David will then facilitate our Annual Report by having each board member read their report. We will have nominations for next year's board by our board committee members Heidi Sheldon and David Lepsig. During lunch, our guest speaker, Karen Nelson, a licensed insurance agent in WA State will present "Medicare - It Doesn't Need to be Confusing". We will wrap up the year presenting the Stark Act and Anti-Kickback regulations under RCW 74.09.240.

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 2019, the Ethics and Best Practices committee updated the Code of Ethics. Updates were made after receiving some feedback from the Adult Family Home Council and The WA State Ombudsman office. We plan to review the Ethics and Best Practices Code for Affiliate members and finalize it in 2020. With an increase in affiliate members this coming year we will be 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 2020.

### **Legislative**

***Heidi Sheldon, Options For Seniors LLC***

We actively advocated with legislators along with the Washington Health Care Association and the Washington State Senior Citizens' Lobby. The Washington State Legislature convened a 105-day long session where the Legislature is charged with adopting a two-year state spending plan. While the state's economy was performing well during the summer months, the impact of tariffs and stock market volatility are being felt now. When the Washington Legislature adjourned on April 28, 2019, the fight for adequate Medicaid funding for nursing home and assisted living centers was not over.

Throughout the 2019 legislative session, we argued that waiting 42 months to update rates is driving closures. That argument was borne out by 12 nursing home closures between February 2017 and December 2018. We pleaded with legislative leaders to correct this problem by implementing an annual rebase with an inflation factor. Despite having the opportunity to do so, majority Democrat budget writers failed to address the crisis. That failure to act has had a direct, detrimental impact. Five additional nursing homes have announced closure since the Legislature adjourned, at cost to patients, families, employees and local communities.

There are now 19 nursing homes that have announced closure or that have closed since February 2017. There are more closures on the horizon. Our message to the Legislature remains urgent: Failure to make Medicaid funding an immediate priority will lead to additional, unplanned facility closures that hurt patients, families and caregivers.

### **Background**

Until June 30, 2018, nursing facility Medicaid rates were based on 2014 cost data. During the 2019 legislative session, there was policy legislation that would update the Medicaid payment methodology to close the gap on the 42-month lag between the base nursing home Medicaid rates cost data and the Medicaid rates year. The update would have resulted in a rebase to 2017 costs on July 1, 2019. In a decision package to the Governor for 2019, DSHS also recommended annual rebasing for nursing homes. The Legislature failed to fund this recommendation.

The state's operating budget did include \$100 million for SNF Medicaid rates, but not until July 1, 2020. The July 1, 2020, rebase does nothing to close the 42-month gap between cost year and rates year, and as the result, current nursing home Medicaid rates are based on 2016 costs until June 30, 2020. Because that 42-month lag still exists, we expect additional nursing home closures.

### **Advocacy Matters**

It is imperative that you communicate with your legislators regarding this crisis. We cannot wait until the 2020 legislative session. Send an email to the Governor and your legislators TODAY regarding the nursing home funding crisis. We encourage you to personalize the message with your own experiences related to the challenges of serving patients with inadequate Medicaid funding.

### **Educating the Public and the Legislature**

While some have argued that people want to receive care in home and community-based care settings, there is not ready access to home and community-based care for Medicaid clients. We need to ensure the Legislature understands that Medicaid rates in assisted living don't cover the costs for 24/7 skilled nursing, let alone the recent and planned increases in the statewide minimum wage. While we appreciate the additional \$28 million allocated to Medicaid funding in assisted living in 2019, it does not fully fund the rates model adopted by the Legislature and will do little to create access at the front door for Medicaid-supported clients. We do not believe there will be an increase in the

Medicaid caseload in assisted living driven by updated rates; current funding still falls far short of the cost of care.

### **The Human Toll of Facility Closures**

The majority Democrats in the Legislature who failed to act must be reminded about the human toll of unplanned closures. A nursing facility closure is devastating for patients, families and employees. In almost all closures, a significant number of residents will not be able to receive services locally. Families lose access to their loved ones at a most critical juncture. Employees cannot afford employment interruptions, and a loss of seniority often means loss of preferred work shifts.

### **Bills supported by ASRP**

#### **HB 1023 – Allowing certain adult family homes to increase capacity to eight beds.**

Introduced by Adult family Home Council – John Ficker

Currently the bill has had three readings in both House and Senate. We expect it to pass and be signed into law during the 2020 session. Summary of Amended Bill: An adult family home provider may increase the home's bed capacity to seven or eight beds. A provider may apply for a license to operate with seven or eight beds if:

- the provider has held the initial adult family home license for at least 24 months;
- the home has been licensed for six residents for at least 12 months;
- the provider has completed two full inspections without any enforcement actions;
- the provider attests an increase will not adversely affect the health, safety, or quality of life of the home's current residents;
- the home is in compliance with DSHS rules regarding emergency evacuation;
- the home has a residential sprinkler system in place for residents who require assistance during an evacuation;
- the provider has paid any required fees; and
- the home attests to not serving individuals who have been committed to a state hospital after committing acts constituting a violent felony or individuals that have been committed to the state's Special Commitment Center as a sexually violent predator.

The home must demonstrate financial solvency and the ability to meet safety, health, and operating standards related to the operation of a seven or eight bed adult family home, including the mitigation of potential traffic impacts.

DSHS must consider current residents' comments related to quality of care, quality of life, and their views on adding more residents to the home. DSHS must provide written notification to the local jurisdiction in which the adult family home is located regarding the applicant's request to increase bed capacity, and allow the adult family home's local jurisdiction to provide recommendations as to whether or not DSHS should approve the adult family home's request to increase its bed capacity to seven or eight beds. In addition, DSHS must conduct an inspection of the home prior to issuing a license to determine if the home is able to meet the needs of eight residents.

DSHS may reduce the maximum number of beds to six if there has been serious noncompliance with licensing standards.

To change ownership of a seven or eight bed adult family home, the new provider must be a provider of an adult family home that has been licensed for at least 24 months and have had at least six residents for at least 12 months. The adult family home must have also completed at least two full inspections, the most recent two inspections must not have resulted in any enforcement actions, and the home must attest to not serving individuals who have been committed to a state hospital after committing acts constituting a violent felony or individuals that have been committed to the state's Special Commitment Center as a sexually violent predator.

The adult family home must notify all residents and their designated representatives about the increase in licensed beds, at least 60 days prior to admitting a seventh resident. The notice must be in writing and in a manner or language understood by the residents and their designated representatives. DSHS is only required to consider the interests of applicants, licensees, residents, or prospective residents when it takes action regarding adult family home licensing.

### **Membership**

#### ***Diane Lepsig, CarePatrol***

This past year the Association membership has welcomed 1<sup>st</sup> Place Senior Housing, Family Values Adult Placement Agency and Oasis of Vancouver as new members, for a total of 18 referral companies. The new affiliate member is MBK and their 6 Puget Sound communities.

We currently have total of 30 members, twelve 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 encourage you to join the efforts of the membership committee and personally inviting our cohorts.

## **Financials for the year**

### ***Abby Durr, Silverage, LLC***

In 2019, 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, 2019 was \$2410.45. Membership dues in 2019 generated \$ \$4,579.10. Notable operating expenses were as follows:

- Website Hosting: \$155.88
- Marketing Design and Print: \$436.66 (Plus an additional printing cost from Heidi and maybe Greg to be added soon)
- WHCA Membership: \$500.00
- Conferences (AFNA, Sr Citizens Foundation): \$0
- Insurance: Directors and Officers \$986.00 (December 2019), Liberty Mutual \$268.00 (January 2020)
- Insurance: \$986.00 paid and \$268 Due in January
- Secretary of State Filing: \$10.00

The current bank balance is \$4,901.75 (12/5/2019) and is the only asset of the Association of Senior Referral Professionals of Washington



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[www.asrpwa.org](http://www.asrpwa.org)