



Association of Senior Referral  
Professionals of Washington

# Annual Report 2021

December 13th



# The Association of Senior Referral Professionals of Washington 2021 Annual Report

## **Executive Board**

### **President 2021**

Lauren Ward, Thrive Senior Advisors, Inc.

### **President Elect for year 2021**

Greg Cranford (for most of 2021) Dedicated Care Solutions

### **Past President 2016**

Lisa Doyle, CayCare Inc.

### **Treasurer 2016-2021**

Abby Durr, Silverage LLC

### **Secretary 2019 -2021**

Rob Young, Oasis Senior Advisors

## **Board of Directors**

### **Communications Chair**

Greg Cranford, Dedicated Care Solutions (served most of 2021)

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

Lisa Satin, The Right Place-Senior Options

Lauren Ward, Thrive Senior Advisors Inc.

### **Ethics and Best Practices**

Abby Durr, Silver Age LLC

### **Legislative Chair**

Heidi Sheldon, Options for Seniors LLC

### **Membership Chair**

Alice Wilkinson, Oasis Senior Advisors

Abby Durr, Silver Age LLC

## **Past Presidents of ASRP WA**

Heidi Sheldon, Options for Seniors LLC	2010 thru 2013 (WA regulated in 2011)
Stan McKenzie, A Change is Afoot	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 Senior Housing  
A Caring Choice Agency  
A1 Senior Care Advisors, LLC  
Alderwood Senior Care Advisory Service  
Adult Care Placements  
Assisted Living Options, LLC  
Authentic Referral Agency for Seniors  
Benevolent Care Solutions/Oasis  
Care Patrol  
CayCare, Inc.  
Concierge Care  
Dedicated Care Solutions  
Family Values  
Forever Care Services LLC  
Nexus Senior Services  
Oasis Senior Advisors  
Options For Seniors  
Pinnacle Senior Placements, LLC  
Silver Age Housing & Care Referrals  
Senior Placement Services  
The Right Place – Senior Options  
Thrive Senior Advisors Inc.

## **Affiliate Members**

Aegis Living  
A Serenity AFH  
Bellevue Manor AFH  
Blue Horizon AFH  
Era Living – The Lakeshore  
Ideal AFH  
Madison House  
Martha Lake AFH  
MBK Senior Living  
Oregon Senior Referral Agency Association  
Retirement Connection  
Stellar Living  
Sunrise Senior Living - 7 locations

## **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 2021

*Lauren Ward, Thrive Senior Advisors Inc.*

For the sake of brevity and changing things up as these past 2 years have brought us major change, this report is formatted in bullet points. The World is still in the throws of C-19 facing the Delta Variant and now the new Omicron Variant which needs further research to learn of it's effects, etc.

Happily at this report, ASRPWA members have successfully survived all of the monumental challenges that we've had to contend with in the Referral/Placement Industry.

- 1) The Paycheck Protection, under the CARES Act was once again offered to small businesses which assisted some Referral Agencies.
- 2) The President mandated that all Health Care workers and government employees receive Vaccinations while Booster shots have been released for everyone.
- 3) As Essential Workers we, as Referral/Placement Agency Owners and Staff serving clients and entering LTC environments and Hospitals, must continue to follow all WA State and Federal guidelines and mandates.
- 4) Touring in person is now commonplace unless Communities or AFHs experience outbreaks consisting of 2 or more persons working and/or residing there who have tested positive for Covid. Such outbreaks force us back to virtual tours until the senior living environment outbreak is over. Again, following appropriate protocols for entering senior living environments and hospitals are still a MUST.
- 5) During these unprecedented times we've witnessed some major changes, and continue to do so in the Adult Family Home Industry with many Providers/Owners retiring or selling their businesses. We wish those who have left the industry a fond farewell as they begin new chapters in their lives while we look to success of the new Providers and partnering with them.
- 6) Following WA State guidelines for increased occupancy a number of AFHs have increased their ability to now accept 8 residents.
- 7) Covid has had a dramatic downward effect on the WA State Budget as well, which is elaborately explained by Heidi Sheldon in the Legislative Report.
- 8) Membership remains approximately the same while participation in Zoom meetings has lowered attendance. This past November was our 1<sup>st</sup> in-person and Zoom membership meeting since February of 2020!

- 9) This year's educational presentations have been excellent as well as very informative which included such topics of Geriatric Mental Health and HB 1218 – Improving the health, safety and quality of life for residents in long term care facilities, as outlined by Lisa Satin in the Education Report.

The ASRP Board wishes to thank Greg Cranford of Dedicated Care Solutions for all of his time and contribution he's made to this organization for the past number of years as Communications Chair. His work has been no small feat! Late last Spring Greg had to take a step back from Chairing the Communication Committee to "Dedicate" his focus more fully on his business and family. We wish him, his business and family well and may they have a grand 2022!

Although we aren't on the other side of Covid-19 it's wonderful to see that our members are still in business as we continue to contend with this virus and that our Referral Partners still know that we are their advocates in following appropriate C-19 protocols and respect their partnership with us.

It is with great sadness that the ASRPWA wants to acknowledge the passing of a longtime Referral/Placement Advisor, Jerry Graham, who passed away in October. We continue to hold Michelle Graham, his wife, and his family in our hearts. In his honor the ASRPWA donated to a charity of Michelle's choice.

I wish everyone comfort, peace and togetherness for this Holiday Season hoping that all of you continue to prosper while serving our clients with your usual compassion, understanding and gentleness while working in the same manner with our Referral Partners.

May 2022, dare I say, bring us an end to this virus leaving us with a renewed sense of peace, gratitude, compassion and relief.

Please don't hesitate to reach out to ASRPWA with any ideas, questions or concerns as we look forward to seeing everyone in person once again!

It's been my greatest pleasure to serve on this Board as President and want to extend my deepest gratitude to all of the Board members as they've volunteered their skills and expertise to this organization along with previous Board members that have contributed their time and efforts for this year of 2021.

Respectfully,  
Lauren Ward  
Thrive Senior Advisors Inc.

## **Committee Reports 2021**

### **Communication**

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

***2021 Revised and abridged version of the 2020 Report (Lauren Ward)***

Communications was focused on Covid-19 updates via the website. [Once again] we kept information flowing between state regulations and care facilities. We posted continuous resources for licensed facilities so they could get proper help on how to handle the pandemic and visitations. No major changes occurred with the website in 2021.

The ASRP controlled email system via mailchimp.com will continue. This allows for quick email blasts to happen with announcements and any other content we feel is important.

The ASRP Facebook page was utilized in 2021. It was also used for announcements and information regarding guest speakers. It has also been a great place to thank our guests and speakers for partnering with the ASRP. More coordination between the website and Facebook will be developed for 2022.

An educational presentation was being designed for 2020 prior to all marketing events being cancelled. This project was placed on hold in 2020 and 2021, but hopefully will be further developed for 2022. This will be a way for all ASRP members to have an approved presentation about ASRP and how its members are truly the industry standard in senior care advocacy.

We close out 2021 looking to brighter 2022 with the hope that Covid-19 will be behind us. May our elderly stay safe, happy, and continue to receive many visitors!

### **Education**

***Co-chair - Lisa Satin, The Right Place-Senior Options***

***Co-chair - Lauren Ward, Thrive Senior Advisors***

***Report by Lisa Satin, The Right Place-Senior Options, LLC***

ASRP Education Chairs work closely with our other ASRP committees to provide the most relevant speakers and topics for our membership. We strive to offer opportunities to help train and educate our members on topics that are important to our members, affiliate members, as well as our clients and their wellbeing. Our speakers join our quarterly, general membership conferences and are invited to stay for the entire conference.

This year, we held our February meeting and most other meetings via a Zoom virtual platform due to the current Covid restrictions and safety concerns.

For the record: In 2020 Dec 8<sup>th</sup> was our Annual meeting for the year 2020. Our guest speaker was Chandra Lewnau, principal attorney at Wall Group Law. She spoke on VA Benefits as well as Medicaid planning. Heidi Sheldon also spoke about the State Budget and Medicaid Rate Advocacy.

Our February 9<sup>th</sup> Zoom conference included Paul Raines, Associate Director of WA Governmental Relations, who presented WAHCA's plan and priorities for the 2021

Legislative session. Paul was followed by Heidi Sheldon, our Legislative Chair who spoke on WA Legislative updates pertinent to our industry.

The April 13<sup>th</sup> Zoom conference focused on Benefits of ASRP Membership and a discussion on what makes a Referral Agent with respect to the RCW definition of a Referral Agent in WA State. We also had a brief legislative update by Heidi Sheldon.

The June 8<sup>th</sup> conference date was changed to June 29<sup>th</sup> in order to host a timely Zoom presentation by David Clemmons regarding the new WA State LTC insurance mandate. David's presentation was informative and explained ways to "opt-out" and other important details about this new State Insurance program.

Our October 12<sup>th</sup> conference was held in-person at Holden Retirement Community in Sea-Tac, WA. Our guest speaker was Karin Taifour, MA LMHC GMHS. Karin focused on Mental Health in Seniors and mental health during Covid in particular. Karin was followed by Heidi Sheldon who presented our Legislative update.

Our Dec 14<sup>th</sup> meeting will be held via Zoom and we plan to have a DSHS AFH inspector speak to us about interpreting State surveys and deficiencies. This meeting includes our Annual Report and if time allows, we hope to have a discussion on Best Practices led by Abby Durr to end our year as an Association of Senior Referral Professionals as well as to kick off 2022 in the best of lights.

The Education committee will continue to provide speakers and information at our quarterly conferences, with relevant content to promote professional development for our members. Topics of discussion will include ethics and best practices, RCW 18.330, legislative updates, DSHS regulations regarding LTC housing & care facilities, AFH status and update as well as any peripheral and industry-related topics that will help our members better serve their clients.

### **Ethics/Best Practices**

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

In 2021, the Ethics and Best Practices committee kept up on WA State pandemic guidelines for LTC providers and made sure fellow ASRP members had notification and clarification about how the state guidelines specifically pertained to referral agencies. We did not do much updating to the ASRP Code of Ethics this year. In 2022, we would like to recruit 2 new Ethics and Best Practices Committee members and have an Ethics and Best Practices committee meeting.

### **Legislative**

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

COVID-19 has had a dramatic impact on LTC, and on the state's economic well-being. With a projected **state operating budget deficit of over \$4 billion**, the Governor's Office of Financial Management has **ordered all state agencies to submit recommendations to achieve an overall reduction of 15 percent.**



On July 28, 2021 DSHS floated its [Budget Reduction Proposals](#) for fiscal year 2021 (FY21), which runs from July 1, 2020, through June 30, 2021, as well as the next biennium which runs from July 1, 2021, through June 30, 2023. To cut Medicaid

reimbursement rates during FY21, the Department will need the Legislature to take action.

The [report](#) anticipates 3% reductions in Medicaid reimbursement for nursing homes of \$17M in FY21 and an additional \$45M for the 2021 – 2023 biennium. In addition, the Department is also contemplating eligibility cuts for skilled nursing providers of 684 Medicaid recipients representing 7.3% of the nursing home Medicaid caseload. Assisted living providers serving Medicaid resident will also see cuts under the DSHS plan. The report anticipates 3% reductions in Medicaid reimbursement for assisted living of \$3.4M in FY21 and an additional \$9.2M for the 2021 – 2023 biennium. In addition, the Department is also contemplating eligibility cuts for ARC/EARC providers of 1,366 Medicaid recipients representing 46.7% of the ARC/EARC Medicaid caseload as well as the reduction of the assisted living caseload by 2,423 Medicaid recipients representing 62.8% of the assisted living Medicaid caseload.

Modeling of MPC Elimination and NFLOC Eligibility Change By Setting	Total client population served May snapshot	Estimated number of clients losing service if modeled level of eligibility change occurred	Estimated % client reduction
AFH	7,472	1,469	19.6%
ARC/EARC	2,925	1,366	46.7%
Assisted Living	3,854	2,423	62.8%
In-home Home Care Agency	15,853	7,037	44.3%
In-home Individual Provider	30,331	8,043	26.5%
Ancillary Services*	N/A	N/A	N/A
ESF	52	42	80.7%
PACE	933	390	41.8%
HCBS TOTALS:	61,420	20,572	
Nursing Home	9,410	684	7.3%
<b>TOTALS:</b>	<b>70,830</b>	<b>21,256</b>	<b>30%</b>

What does the new eligibility look like?

The eligibility reduction that was modeled for this budget exercise would:

- Eliminate the MPC program.
- Change the NFLOC eligibility model to increase the functional impairment level required for eligibility in the following ways:

- Previously, where one method required a specific treatment need under the supervision of a nurse, the types of **treatments and provider types are reduced.**
- The method that previously **required an unmet need with at least three ADLs is removed.**
- The method that previously required an unmet need with at least two ADLs is **increased to at least four ADLs.** When Medication Management is one of the ADLs identified, it has changed from requiring assistance at any frequency to needing daily assistance.
- The method that previously required an unmet need with at least one ADL in addition to a cognitive impairment is increased to at least two ADLs in addition to a cognitive impairment. When Medication Management is one of the ADLs identified, it has changed from requiring assistance at any frequency to needing daily assistance. The **data elements that compose identification of “cognitive impairment” have also changed.**
- **Removes the ability for a client to decline assistance and become eligible.**
- **Narrows the situations where a client can become eligible** because an activity didn’t occur because they didn’t have a caregiver but would have accepted assistance if they had a caregiver.

It is up to each of us to ensure our legislators protect funding and care for Washington citizens requiring care. Please take the time this month before session starts in January to contact your legislators and start a conversation about the need fund Long Term Care for Senior’s in the State of WA.

How to contact your Representatives:

Step 1 - Follow this link: [Washington State Legislature](#)

Step 2 - Verify your legislative district and your address

Step 3 - Your legislator names should show up – click on your senator

Step 4 - Enter your contact information

Step 5 - Enter your bill position and comment

Step 6 - Send your comment

Thank you, for taking the time to advocate.

**Membership**

***Alice Wilkinson, Oasis Senior Advisors***

During 2021 ASRP has welcomed Alderwood Senior Advisory Service serving Greater Seattle & Eastside of King County, and South Snohomish County.

An Affiliate Membership Benefit trifold has been created to assist our organization’s

affiliate members gain better understanding of ASRPWA along with many benefits of joining our organization and partnering with ASRP Referral/Placement Agencies.

It's exciting to report that we have 22 Members and 13 Affiliate Members. We look very forward to growing our membership vis-à-vis in person meetings and through the use of the newly created ASRPWA Membership and Affiliate Membership Benefits Brochure.

### **Financials for the year**

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

In 2021, 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, 2021, was \$3845.79. Membership dues in 2021 generated \$2,400.00 so far and we anticipate another \$1500.00 to come in before the end of the year.

Operating expenses were as follows:

- Bereavement to a grieving member & colleague: 200.00
- Website Hosting: \$187.69
- Brochure Design and Print + printing for events: \$0
- WHCA Membership: \$500.00 (Coming in December 2021)
- Conferences (AFNA, Sr Citizens Foundation): \$0
- Insurance:
  - Directors and Officers \$1064.00
  - Liberty Mutual \$268.00 (coming January 2022)
  - Secretary of State Filing: \$10.00

The current bank balance is \$5,971.72 (12/1/2021) and is the only asset of the Association of Senior Referral Professionals of Washington.



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