



# Annual Report 2023

December 6th



# **The Association of Senior Referral Professionals of Washington 2023 Annual Report**

## **Executive Board**

### **President 2023**

Lauren Ward, Thrive Senior Advisors, Inc.

### **President Elect for year 2023**

Heidi Sheldon, Options for Seniors

### **Past President 2023**

Open

### **Treasurer 2023**

Abby Durr, Silver Age LLC

### **Secretary 2023**

Lisa Doyle, CayCare

## **Board of Directors**

### **Communications Chair**

Abby Durr, Silver Age LLC

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

Lisa Satin, Tailored Advisory Solutions

### **Ethics and Best Practices**

Abby Durr, Silver Age LLC

### **Legislative Chair**

Heidi Sheldon, Options for Seniors LLC

### **Membership Chair**

Open

### **Affiliate Board of Directors**

Dorina Ilisan, Ideal Home Care

Mary Miller, Aegis Living Kirkland Waterfront

## **Past Presidents of ASRP WA**

Heidi Sheldon, Options for Seniors LLC	2010 through 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 through 2019
Lauren Ward, Thrive Senior Advisors	2020 through 2021
Alice Wilkinson, Oasis Senior Advisors	2022
Lauren Ward, Thrive Senior Advisors	2023

## **Current Members**

1<sup>st</sup> Place Senior Housing  
A Caring Choice Agency  
A1 Senior Care Advisors, LLC  
Alderwood Senior Care Advisory Service  
Always Best Care Senior Services  
CayCare, Inc  
Concierge Care  
Dedicated Care Solutions  
Forever Care Services, LLC  
Oasis Senior Advisors  
Options For Seniors  
Pinnacle Senior Placements, LLC  
Senior Housing Advisory Services  
Senior Placement Services/Care Patrol Seattle  
Silver Age Senior Living Advisors  
Tailored Advisory Solutions  
Thrive Senior Advisors Inc.

## **Affiliate Members**

Aegis Living  
A Serenity AFH  
ERA Living  
Family Resource Home Care  
Grace Lodge LLC  
Ideal Senior Care  
Madison House  
Mariana's Adult Family Home Inc  
MBK Senior Living  
Oregon Senior Referral Agency Association  
Sunrise Senior Living

## **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 that 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) Referral professionals are used 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 association members to have a voice in future legislation and regulation regarding senior housing and care services.
- 10) The 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 2023**

*Lauren Ward, Thrive Senior Advisors Inc.*

### **Message from the President**

It's been a pleasure serving as the Board President for 2023. Now, I pass the baton onto Heidi Sheldon as she will take the helm as President for 2024 and hold the position of Legislative Chair, providing Members with up-to-date Legislative news.

It's been an exciting year with the many superb educational topics with presenters secured by Lisa Satin, which attracted excellent attendance. Meanwhile, the number of Members has increased to 19, with Affiliate Members up to 9. Additionally, the Board has voted to accept a company as an Affiliate Member instead of just one membership from each community of a company. Happily, the Board now has 2 Affiliate Board Members representing the Assisted Living and Adult Family Home industries, Mary Miller and Dorina Ilisan, respectively.

Besides ASRP offering presentations, new events have been scheduled periodically for after-hour get-togethers for Referral Agency Members and nonmembers to facilitate opportunities for everyone to socialize and learn more about each other.

A new ASRP pamphlet has come to fruition, which explains the many benefits of Membership in this organization. This was a collaborative effort provided by Lisa Doyle, Lisa Satin, Alice Wilkinson (previous member), and Abby Durr. It has been added to the ASRP website.

Graciously, Abby Durr has been volunteering her time to hold a number of chair positions, which include Ethics and Best Practices, Treasurer and Communications Co-Chair with Lisa Satin. With that, the board always welcomes new members for the positions of board chair or co-chair to contribute their knowledge and ideas.

As 2024 rolls in, the ASRPWA looks forward to its ongoing growth, new and exciting presentations, and periodic after-hours events.

Lastly, I want to thank the Board of Directors for all of their time, energy, knowledge, and ideas that they have contributed to this professional organization this past year and for the many years since the inception of ASRPWA!

Respectfully,  
Lauren Ward  
Thrive Senior Advisors Inc.

# Committee Reports 2023

## Communications

***Co-Chair, Abby Durr, Silver Age, LLC***

***Co-Chair, Lisa Satin, Tailored Advisory Solutions***

Abby emails Membership Meeting Notices utilizing Constant Contact, and she updates the ASRPWA website while both Abby and Lisa post on the Facebook/Meta page.

## Education

***Lisa Satin, Tailored Advisory Solutions***

We work closely with our other ASRP committees to provide relevant speakers and topics for our membership. Our responsibility is to be responsive to our members and procure speakers and panel discussions for the purpose of continuing education. This education benefits us as referral professionals, our affiliate members, as well as our clients and their welfare.

Our December 13<sup>th</sup> meeting took place at The Meridian at Stone Creek. We had James Alberson as a speaker on the topic of personality traits. We also held our Annual Meeting and went over all the committee reports for 2022. New nominations were made for our 2023 year.

Our March 14<sup>th</sup> meeting was held at Queen Anne Manor, where we had John Ficker, head of the AFH council, as our speaker on various topics, such as the huge number of new AFH providers buying or opening their new AFHs. John talked about our shortage of RCS agents and how reimbursement rates for residents are increasing, with the new low being \$110/day. He also touched on the importance of AFH council membership and the resources they provide their members. The program was well-attended and thoroughly engaging. Heidi Sheldon also gave a legislative update to keep us informed on what WA state is doing for our seniors.

Our June 13<sup>th</sup> membership meeting was held at The Lakeshore. We had David Haack as our speaker on the LGBT+ population and Modern Aging issues. Many discussions around these issues were helpful in understanding some of these complex issues. Abby Durr also spoke about the Top 10 Citations DSHS encounters on inspections. That was an interesting exercise, and we discussed learning what the state found versus what we all predicted would be more common. Heidi Sheldon gave a legislative wrap-up of the outcomes of House Bills for this past session.

Our August 8<sup>th</sup> Membership meeting was hosted by The Weatherly in Renton. We had a good turnout of members, affiliates, and AFH providers. Our speaker was Karla Jackson, RN, BSN, MN. Karla talked about assessments and what they include to create a care plan. The state has a formula for these DSHS-required assessments, and each assessor can make their own tool to create a useful assessment for the AFH providers. Karla had

lots of tips for us and shared information about the AFH Nurses' Association, as well as many other useful things regarding AFH assessments.

Our Annual meeting will be held at the Chateau Valley Center in Renton on Dec 6<sup>th</sup>.  
Speaker is TBD

### **Ethics/Best Practices**

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

In 2023, the Ethics and Best Practices Committee was available to fellow ASRP members who had questions about how the state guidelines specifically pertained to referral agencies. We did not do any updating to the ASRP Code of Ethics this year but continued to spread the word about our high standards and best practices. In 2024, we look forward to recruiting new Ethics and Best Practices Committee members and having an Ethics and Best Practices Committee meeting.

### **Legislative**

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

#### **Policy Round-Up For 2023**

**HB 1431—Clarifying that meals furnished to tenants of senior living communities as part of their rental agreement are not subject to sales and use tax.** Rep. Joe Timmons' legislation to clarify that senior meals are not subject to sales tax passed the House and Senate on unanimous votes and is now at the Governor's Office for signature.

**HB 1547—Increasing the health care workforce by authorizing out-of-state providers to practice immediately.** The legislation creates an expedited temporary practice permit process for registered nurses, advanced registered nurse practitioners, and licensed practical nurses who are licensed in Alaska, California, Idaho, or Oregon to practice in Washington. The legislation failed to advance but is eligible for reconsideration next year.

**HB 1694—Addressing home care workforce shortages.** The legislature is working to eliminate barriers to training and credentialing for healthcare workers, including home care aides employed in assisted living. Of particular note for providers is that the term "date of hire" is defined as the first day the long-term care worker is employed by any employer. Long-term care workers who are not currently certified or eligible to reactivate an expired credential may receive a new date of hire when either beginning work with a new employer or returning to work for a former employer. The bill has been signed into law.

**SB 5547—Concerning nursing pool transparency.** This legislation aims to ensure that nursing pools (staffing agencies) are registered with the Department of Health. The bill also establishes reporting requirements related to provided services. The bill has been signed by the Governor.

**SB 5499—Concerning the multistate nurse licensure compact.** Legislation that would make Washington a Nurse Licensure Compact state passed the Senate on a 40-8 vote earlier this month. The bill has been signed into law by Governor Inslee.

**SB 5278—Implementing audit recommendations to reduce barriers to home care aide certification.** This legislation is intended to address the Washington State Auditor's report about barriers to training and certification for home care aides. The legislation has passed the Senate and has undergone several revisions but, in short, is intended to provide easier access to training and testing for home care aides. The bill has been advanced to the Governor's Office for final consideration.

**SB 5582—Reducing barriers and expanding educational opportunities to increase the supply of nurses in Washington.** This legislation directs the State Board for Community and Technical Colleges (College Board) to develop a plan to train more nurses over the next four years, including the development of an online Licensed Practical Nurse program at two community or technical colleges. The bill modifies program approval and training requirements under the Nursing Care Quality Assurance Commission and creates a marketing plan to advertise available nurse training opportunities and jobs in Washington. The bill has been signed by the Governor.

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 to fund Long Term Care for Seniors 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

### **Membership**

***Lauren Ward, Thrive Senior Advisors Inc.***

The number of Members has increased to 17, with Affiliate Members up to 11. New members in 2023 included Sarah Cave with Always Best Care Senior Services and affiliates Tracy Morcam with Family Resource, Daniel Vidican with Grace Lodge, LLC, and Mariana Antonescu with Mariana's AFH, Inc. Additionally, the Board voted to accept a company as an Affiliate Member instead of just one membership from each community of a company. In 2023, the Board added two Affiliate Board Members representing the Assisted Living and Adult Family Home industries, Mary Miller and Dorina Ilisan, respectively.



### **Financials for the year**

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

In 2023, 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, 2023, was \$5,862.45. Membership dues in 2023 generated \$3,214.83 so far (as of Dec 5th), and we anticipate another \$200.00 or so to come in before the end of the year.

Operating expenses were as follows:

- Bereavement/thank you flowers: 190.35
- Website Hosting: \$201.89
- Brochure Design and Print for events: \$96.88
- WHCA Membership: \$500.00 (Coming in December 2023)
- Conferences (AFNA, Sr Citizens Foundation, host gifts): 0
- Insurance (estimated, real numbers coming soon):
  - Directors and Officers \$964.00
  - Liberty Mutual- General Liability & Crime: \$285.00
  - Secretary of State Filing: \$150.00

The current bank balance is \$8,402.79 (12/05/23) and is the only asset of the Association of Senior Referral Professionals of Washington.

