



2010 Pathways to Greatness Award

A Recognition Program for Aging-Services Organizations

Foulkeways at Gwynedd Gwynedd, Pennsylvania

October 2010

If you hear a buzz around Foulkeways at Gwynedd, it might be from the honeybees in the Meadow, or it could be from its active community members who contribute more than 23,000 volunteer hours to 150+ nonprofit organizations and more than 100 on-campus committees that help define the lifestyle at Foulkeways. Foulkeways was founded in 1967 as the first continuing care retirement community in Pennsylvania. Its Quaker values of volunteerism and the “unique worth of every human being” clearly permeate the lifestyle here. Foulkeways was selected as the 2010 Pathways to Greatness recipient for its outstanding performance on all of the program’s criteria. Here are a few highlights that made them stand out:

- **Culture change:** Fully embraced on every level—care, programming, environment, even marketing where two unique programs help turn “wait-listers” into community members
- **Distinctive impact:** A green technology project, aiming to achieve a carbon neutral footprint
- **Quality:** Strong benefit strategy and empowerment result in low staff turnover and high quality care for residents
- **Leadership and governance:** CEO was given a three-month sabbatical to explore new services and programs; and the board mentors its members and encourages regular interaction with residents
- **Financial:** Eliminated market volatility from the budgeting process

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2010 Pathways to Greatness Award Recognizes Foulkeways at Gwynedd for Leadership and Superior Performance

LarsonAllen LLP, a national CPA, consulting, and advisory firm, and the [American Association of Homes and Services for the Aging](#) (AAHSA) sponsor the Pathways to Greatness program. This is a nationwide effort to help AAHSA members improve the quality of their organizations. Pathways to Greatness is designed to define the primary attributes of high-quality aging-services organizations and recognize them for their excellence.

Key organizational attributes and practices leading to greatness

Pathways to Greatness recipients are selected by a panel of industry experts who evaluate five key attributes of a successful aging-services organization: leadership, superior performance, distinctive impact, best practices and innovation, and the ability to inspire public trust and confidence. This year's honoree, Foulkeways at Gwynedd, demonstrated outstanding results in all of these categories, but their approach in the following areas was particularly unique:

Culture change: fully embraced on every level—care delivery, programming, environment, even marketing to prospective residents

“Two heads are better than one, and 400 are better than two.”

—Foulkeways' CEO Doug Tweddale reflecting on their philosophy about resident engagement

“Culture change is never easy, and it never ends,” says CEO Doug Tweddale. At Foulkeways, a resident-centered approach has been part of the culture from the start. Staff attributes much of this to the organization's Quaker values. However, Foulkeways takes it one step further by including residents in the decision-making committee process. These committees are made up of board members, staff, and the residents. All residents are encouraged to voice their opinions and feel comfortable providing feedback to the committees' resident-members, as well as staff and board members. “We uphold each resident's right to articulate their own definition of quality of life and to integrate this into their involvement in the overall community,” says Tweddale.

The Community Center Redesign Project offers one example of Foulkeways' resident-centered approach. In 2009, following a year of meetings by one ad hoc committee, input was sought from all community residents on the design plan for the renovation project. Foulkeways' leadership received 246 resident letters that picked apart every aspect of the design. So, the committee reviewed the input and literally went back to the drawing board. The result was the development of a new plan for the Community Center that cost \$2 million less than the original plan and had buy-in from the community members.

- **Home-like care:** The skilled health care center is designed around the neighborhood concept. Each neighborhood has 10 rooms, its own nursing care base, living area, kitchen, and dining room. Each room has a private bath with a European shower and walk-in closet.
- **Dining choices:** Residents in any level of care may dine in any venue on campus, and every level of care has an outdoor dining option. Independent living residents have a new flexible meal plan option where they decide quarterly how many meals they want. This allows them to vary the number of meals they purchase daily based on their needs.
- **Resident needs at core of decisions:** Staff explains that at every interdisciplinary team meeting where they discuss resident care and needs in the skilled nursing facility, one staff member

automatically serves as the residents' advocate, making sure their perspective is taken into account in crafting a solution when the resident or family are not present.

- **Residents personalizing the experience:** Residents serve as campus tour guides, which offers prospective residents an opportunity to ask frank questions about life at Foulkeways. In addition, the Resident Welcome Committee assigns a resident host for every new resident based upon their shared interests to ease the transition to their new home.
- **Moving Forward program:** For the past two years, in response to the challenges older adults face in selling their homes, Foulkeways initiated the Moving Forward program. This program helps future residents by providing a zero percent swing loan for six months or until they sell their home (whichever comes first). This effectively defers their entry fee. This program also connects them with a real estate consultant (no charge) who advocates on their behalf with the realtor. Once the house is sold, a moving and packing service helps them decide what to move and then packs and moves the items to their Foulkeways' home (Foulkeways pays a portion of the cost of this service).
- **Mini-getaway program for prospective residents:** Another unique program that has helped Foulkeways maintain its occupancy throughout the latest recession is their mini-getaway program for prospective residents on their wait list. For a nominal fee, prospective residents can spend two nights and three days trying out life at Foulkeways. In advance of their getaway, they complete a questionnaire that helps staff match the individual or couple with current residents who have similar interests. Twenty-five percent of those who participate in this program enter the community sooner than they had previously planned.

Distinctive impact: aiming to achieve a carbon neutral footprint

Based on an idea initiated by a resident committee, the Foulkeways' board of directors set a goal to achieve carbon neutrality, as part of its Green Technology Project. Green committee members worked for a year to develop a three-phase implementation plan to achieve the goal. They've started by tackling the "low-hanging fruit"—upgrading to energy saving windows and doors, installation of low-flow toilets and water saving shower heads, and educating residents on using certain high-energy appliances during non-peak hours. The result to date is a 6 percent reduction in electricity and 46 percent reduction in water usage. They are also phasing-in geothermal heating and cooling systems in 261 units over the next four years. They are tracking their progress towards their goal and using real-time data to affect behavior and to educate the entire Foulkeways' community. Phase II plans are underway.

Going green also means eliminating use of pesticides, reducing land maintenance needs (e.g., mowing, watering) and preserving/growing green space on the campus. Three hives of honeybees have been placed in the Meadow—an area that has been allowed to grow wild to reduce the frequency of mowing. The hives are maintained by local beekeepers from Drexel University. Community members benefit from the honey produced by the bees and the pollination of the plants and flowers at Foulkeways.

Quality: strong benefits and empowerment equal low staff turnover and high quality care

Foulkeways' Quaker values are not only woven into the campus' fabric but are taught to staff when they start working at Foulkeways. These shared community values guide many of the benefits and opportunities offered to staff and likely contribute to the low staff turnover—roughly 6 percent. This high retention rate undoubtedly has made it easier for Foulkeways to achieve its latest zero-deficiency survey and a consistent five-star rating on Nursing Home Compare. Staff is empowered to address issues as they arise, encouraged to listen to residents, and banish "We've always done it that way" from their vocabulary. "By keeping our ear to the ground on a daily basis, we're able to hear if a stampede is coming," says Tweddale.

The board has committed to paying salaries in the top 25 percent of the industry and continues to offer employees a defined benefit plan (extraordinarily rare for any business these days) in addition to a 403(b) plan, where they match up to 50 percent of the first 3 percent of staff contributions. Various assistance funds, supported by residents and the board, have been established for staff to help pay tuition to advance their education, and pay Foulkeways' entrance fees should they choose to live there when they retire (up to a 30 percent discount based on years of service).

Staff development is supported through mandatory training days, which were started five years ago. Each training day has a theme where information is disseminated through fun activities like skits and games (e.g., Foulkeways Family Feud). Because all staff is required to attend, it creates an opportunity to interact with staff from other departments.

Leadership and governance: board member mentoring and CEO sabbatical

Effective leadership and strong governance practices are highly valued in Pathways to Greatness organizations. In an effort to develop an involved, working board of directors, Foulkeways assigns one or two experienced board members to help mentor new board members. Board members regularly dine with residents after board meetings to engage residents and hear concerns, both large and small. Over the years, the board has always remained committed to keeping Foulkeways on the leading edge of the aging-services industry.

CEO Doug Tweddale believes Foulkeways' goal to stay on the leading edge of retirement living is one of the reasons the organization has had success. The board recognized that to reach this goal the organization not only needed to meet today's members' needs, they also had to implement programs and services to attract new residents. So, they gave long-standing CEO Doug Tweddale a three-month sabbatical to explore new services and programs offered around the country. During this hiatus, the senior leadership team stepped up to manage the day-to-day operations of the campus.

Financial: a history of discipline

Foulkeways' leadership and its board have been on a path of continuous financial improvement since the organization's inception. In the 1980s, the organization adopted zero-based budgeting. Then around 2000, the board decided to remove investment income from the operational budget after hearing this recommendation at several AAHSA educational sessions. This budgetary change was implemented gradually (completed in 2004) allowing them to remove a variable they couldn't control and smooth out rate increases for residents to no more than 3.5 percent per year (much lower than other facilities in the area). Rate increases are transparent and residents receive a chart each year showing the rate increases every year since the organization opened.

**“If it's ugly;
don't hide it.”**

—Foulkeways' CFO
Edna Cristinzio on their
approach to budgeting

As the recession began in 2008, the board's finance committee requested a series of dashboard reports from staff to take a hard look at occupancy rates for the coming year and budgeted conservatively for unoccupied units. As a result, they beat their budget for unoccupied units for the past two years. Foulkeways' CFO Edna Cristinzio stresses that a realistic approach to budgeting and “keeping their feet to the fire on expense control and income control” helped Foulkeways build its reserves.

Congratulations, Foulkeways at Gwynedd!

LarsonAllen and AAHSA are proud to recognize Foulkeways at Gwynedd for its remarkable accomplishments in the aging-services field. We congratulate the staff, leadership, and board for their commitment and dedication to the *Pathways to Greatness* journey and the residents they serve.