

## 2011 *Pathways to Greatness* Award A Recognition Program for Aging-Services Organizations



### **DEERFIELD EPISCOPAL RETIREMENT COMMUNITY, INC., ASHEVILLE, NORTH CAROLINA**

Greatness is easiest to identify when it manifests itself in flashy new programs, but it often goes unnoticed when it's a culmination of many things done well. The 2011 *Pathways to Greatness* recipient, Deerfield Episcopal Retirement Community, Inc. (Deerfield), is an organization that does many things exceptionally well. While many applicants impressed the judging panel in a few of the five "greatness" areas, Deerfield demonstrated commitment to *all* principles of the program. Here are a few highlights that made them stand out.

#### **Resident focus and commitment to continuously improving quality of life**

Deerfield's consistent pursuit of best practices in staffing, clinical quality, assisted living (AL), and tools and technology complements a well established culture of caring that create an optimal environment for residents.

#### **Financial stewardship**

Deerfield maintained a focus on the future and moved forward with a \$100 million development during the nation's economic downturn. Through a relationship-based marketing strategy, the organization rapidly filled its new expansion to 90 percent occupancy, while maintaining strong financial outcomes and low fee increases.

#### **Relationship-based marketing strategy**

Deerfield has a targeted, relationship and web-based marketing approach for existing and future residents. This strategy helps prospects develop an affinity for the campus without the sales pressure through monthly workshops and introductions to existing resident mentors.

### **PATHWAYS TO GREATNESS PROGRAM**

The *Pathways to Greatness Program* is designed to recognize high-quality aging-services organizations for their excellence. Recipients are selected by an industry steering committee panel based upon the five key attributes of a successful aging-services provider: leadership, superior performance, distinctive impact, best practices and innovation, and the ability to inspire public trust and confidence. LarsonAllen, a national CPA, consulting, and advisory firm and LeadingAge sponsor the nationwide effort to help improve the quality of senior living providers.

"We have a commitment to always being better. We want to be better tomorrow than we are today."

—Deerfield's CEO Bob Wernet

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By upholding resident-centered principles, the transition from independent living to assisted living is no longer considered negative.

## WHAT MAKES DEERFIELD STAND OUT?

This year's honoree demonstrated superior results in all of the *Pathways to Greatness* categories, but Deerfield's approach in the following areas was particularly notable.

### Resident focus and commitment to continuously improving quality of life

Deerfield's philosophy is, "Do things in the best possible manner so that no task must be done over and every completed task is a source of pride." This commitment to quality is evident throughout the organization.

#### Staffing

Deerfield maintains a staffing ratio of 4.2 hours/resident/day, which is twice the state requirement and 0.6 higher than the industry standard. This allows staff to have a more balanced workload and provide significantly better care. In addition, seven years ago, they eliminated the use of agency staff and assigned personnel to care for the same residents every day. This approach has resulted in organizational cost savings, lower turnover (10.5 percent), and improved resident outcomes through more accurate documentation and observations by the assigned caretakers.

#### Resident-centered design standards

Deerfield made a conscious decision to make AL more enticing to encourage transitions when they are necessary. Unlike some senior living organizations that embrace aging in place, Deerfield does not encourage the use of supportive services in the independent living (IL). Its philosophy is that residents should have control over their environment rather than their environment controlling them. Therefore, the staff encourages residents to move through the continuum of care when their needs change.

The challenge then was to make assisted living attractive for residents when they needed that level of service. To achieve that objective, Deerfield placed the assisted living apartments in the heart of the Deerfield campus above the wellness center, business center, and riverwalk, at the center of all resident activities. Especially popular with both IL and AL residents and their families is the new AL Treetop Vistas dining destination that has spectacular mountain views overlooking the elegant Biltmore Estate. These features allow the AL residents to maintain their social connections by making campus activities more accessible and does not isolate them from their IL friends. The AL apartments were designed with short hallways, and a home-like environment that eliminates reminders of an "institution." By upholding resident-centered principles, the transition from independent living to assisted living is no longer considered negative (90 percent of those identified as needing AL have made the move). In fact, some residents are asking to transition well before they need it.

A striking outcome of Deerfield's commitment to creating a seamless, positive transition between IL and AL is the changing composition of the IL residents: decreased average entry age by 5 years to 75; increased number of couples in their 60s; and a growing number of single men.

#### On-site primary care clinic and geriatric fellowship program

Through a partnership with Mountain Area Health Education Center (MAHEC), Deerfield residents, staff, and even prospective residents have access to primary health care on campus. The clinic operates 4–5 mornings per week and provides a weekly coumadin clinic to check blood levels as well as an osteoporosis clinic. In addition, a geriatrician provides medication review services for all residents. Deerfield is also the training site for the MAHEC Geriatric Fellowship Program.

#### Tracking key metrics

To improve residents' quality of life, Deerfield identifies key quality metrics, tracks the progress, and holds staff accountable for the consistent application of best practices through the use of technology. The results are impressive.



Treetop Vistas has spectacular mountain views overlooking the elegant Biltmore Estate.

- In its nursing facility over the past five years, **50 percent of short-term admissions return to IL.**
- Rates of acquired wounds are less than **0.16 percent for short-stay** nursing residents and less than **0.8 percent for long-stay** nursing residents.
- Recognizing fall prevention as a critical health issue, Deerfield invested in SlideFree pads, which are non-absorbent high friction pads originally designed for wheelchair users, but can be used on any type of chair. The pad keep residents from sliding down and out of their chairs, reducing the incidence of falls. Within 30 days of using the new tool, **falls were reduced by 50 percent.**
- In 2009, Deerfield implemented CliniShield hand hygiene stations and hand washing protocols to reduce resident infection rates and staff illnesses. Placing hand hygiene stations in visible areas near the entry and exit points, elevators, common spaces, and in recessed areas within each of the “neighborhoods” created a visual reminder to residents, staff, families, and visitors alike to keep hands clean both on the way in and out of living spaces. Since implementing the new protocol, resident urinary tract, upper respiratory tract, and wound infections have decreased roughly **30 percent per year over the past two years.** General staff illnesses have declined as well. In addition, Deerfield provides flu shots for all staff each fall. As a result of this diligence, there hasn’t been a flu outbreak for the last three years.

#### Financial stewardship

In July 2008, Deerfield borrowed \$100 million to undertake a significant campus expansion including 83 IL units, 20 large, deluxe AL units, and 14 large, private nursing care rooms, in addition to numerous other new amenities and expanded common areas. Timing could not have been more challenging. Robert Chandler, CFO, said, “We had to keep our eye on the long term and not hit the panic button.”

Deerfield’s strong history of financial stewardship (e.g., BBB+ rating by Fitch) coupled with prudent short-term fiscal restraint during the project timeline (freezing wages, eliminating unnecessary travel, and reducing expenses as much as possible) helped it complete the expansion on time and under budget (by refining parts of the original plan).

Keeping the focus on the future was essential. Some companies cut marketing budgets when times are tough, Deerfield, however, increased it, recognizing the critical importance of filling its new units as efficiently and effectively as possible. The new independent living apartments opened in July 2010 and are currently 90 percent occupied and 95 percent reserved with a waiting list of more than 600. Deerfield was also able to pay off its short-term debt (\$20 million) early.

Another way Deerfield reduces operating costs and improves safety is through a new joint venture with four other area continuing care retirement communities (CCRCs). This risk management consortium will share best practices and purchase commercial insurance as a group. Members of the consortium are expected to obtain a third party evaluation of their risk management practices, and ultimately, maintain a minimum grade. The intent is to reduce insurance costs through greater buying power and reduce risk through best practices.

#### Relationship-based marketing strategy

Deerfield’s focus on building relationships with their residents, staff, and community is also reflected in how it approaches marketing and sales.

Deerfield recognized its customers have different information and communication needs, so it created one website, ([www.MyDeerfield.org](http://www.MyDeerfield.org)) for existing residents and maintained another website ([www.deerfieldwnc.org](http://www.deerfieldwnc.org)) for marketing to future residents. MyDeerfield.org operates like an Intranet site and includes the activity calendar, a resident directory (password secured), dining menus, transportation



Deerfield made a conscious decision to make assisted living more enticing.

schedules, the resident handbook, campus hiking maps, photo galleries, and resident council and committee meeting minutes.

Their marketing strategy focused on building genuine relationships directly with prospective residents. This interactive strategy combated the challenges posed by the economic downturn. In addition to the typical communications with depositors or prospective residents, Deerfield offered monthly “solution seminars” on pertinent topics for future residents, who were named the “Class of 2010.” Subjects included: “How to Choose a Realtor,” “How to Stage Your Home,” “How to Downsize,” and “How to Select a Moving Company,” all presented by local businesses.

These seminars offered an opportunity for the Class of 2010 to build rapport with each other, Deerfield staff, and existing residents, who could help them acclimate to the campus. The marketing efforts were so successful more than 30 percent of new residents moved into Deerfield before they were able to sell their homes.

### **CONGRATULATIONS, DEERFIELD**

LarsonAllen and LeadingAge are proud to recognize Deerfield 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.

This white paper only touches on a few of the ways in which Deerfield lives the Quality First principles and embodies the *Pathways to Greatness* goals. Deerfield CEO Bob Wernet said as a single-site aging-services provider, it is important for him to stay involved in industry associations and learn from his peers. We encourage you to learn more about what makes Deerfield a great organization and how you might learn from them.

To learn more about Deerfield visit  
[www.deerfieldwnc.org](http://www.deerfieldwnc.org) or call 828-274-1531.