



2012 PATHWAYS TO GREATNESS

A Recognition Program for Aging-Services Organizations

The Mather LifeWays culture...empowers employees to create an interesting, productive, playful, and energizing workplace, resulting in a personalized experience for residents and customers.



Mather LifeWays is this year's honoree for its commitment to quality, organizational culture, financial strength, and focus on wellness.

MATHER LIFEWAYS, EVANSTON, ILLINOIS

The administrators, staff, and customers of Mather LifeWays (MLW) know that true greatness comes from within. As the 2012 Pathways to Greatness recipient, Mather LifeWays, is an example of what can be accomplished when a deep commitment to quality permeates the culture and guides an aging-services organization.

In choosing MLW, our industry expert panel looked at five "areas of greatness" — leadership, superior performance, distinctive impact, best practices, and innovation. This year's honoree received high marks in every area. This document highlights just some of the programs, services, and attitudes that distinguish MLW and make it an example for those who strive for greatness.

THE MATHER LIFEWAYS CULTURE

Organizational culture has two sides: what staff and employees experience, and what customers and the public experience. The MLW culture is strong and dynamic on both sides, with a goal of turning things upside down and departing from the expected. It is built on a foundation of empowering employees to create an interesting, productive, playful, and energizing workplace, resulting in a personalized experience for residents and customers.

Eliminating My Impossibilities (EMI)

Employees are encouraged to remove barriers that prevent them from trying new things, to celebrate successes, and to take pride in their association with MLW by Eliminating My Impossibilities (EMI). EMI is a constant reminder of the power of positive thinking for employees and customers, and meshes with an underlying commitment to the potential in everyone.

To assist customers and employees in achieving the Mather EMI experience, MLW has developed an acronym, TOPPE, to describe what EMI looks and feels like:

Transformational: Explores dreams, hopes, and goals, and asks more questions of residents/customers to learn their needs; encourages good change and positive impact on the lives of others.

Orange: Makes people feel empowered, unique, good-natured, positive, quirky, and welcome (more on orange later).

Purposeful: Demonstrates clear intentions with a positive goal, and includes others in achieving goals.

Possible: Draws out the best in people and acts to eliminate fear, making it possible to move beyond our abilities to our possibilities.

Extraordinary: Creates meaningful moments that are irreplaceable, irresistible, and uniquely Mather.

The language of possibilities

EMI was evident in the recent repositioning of The Mather, a continuing care retirement community (CCRC) in Evanston. New signage was created to show that change had taken place at The Mather in a dynamic and positive way. Employees, residents, and guests now see signs that call administrative offices “The Suits,” a multipurpose room is named “Possibilities,” physical therapy is “Moving Parts,” occupational therapy is “Other Moving Parts,” and skilled nursing is the “Life Centre.”

MLW’s language surprises people in a good way and engages them in conversation. For example, you won’t find the word “repriorment™” in a dictionary, but it has a very real meaning for MLW residents. Repriorment is the act of rediscovering the joy of long-forgotten pursuits often pushed to the side earlier in life. In similar fashion, administrators are “experience directors,” a cook becomes a “manager of culinary delight,” public areas are “possibilities spaces” and “experience centers,” and the management team is the “possibilities team.”

The importance of being orange

Consistent branding is at the core of MLW’s image with all of its audiences. Throughout the organization, the color orange has become a rallying point and a mark of distinction that reminds everyone of MLW’s differences. Experience directors, staff, and employees are often seen wearing orange as a sign of unity and strength of purpose. The playfulness of bright orange wigs, party hats, and shoes — not to mention a life-sized orange corporate mascot — is not lost on residents and board members, who frequently join in the fun.

A flavor of quirkiness and fun even permeates *The Mather Resident’s Handbook*, which would typically be a dry, factual document. Here, we find statements like this one: “If you find or lose a personal article, please notify the concierge. If you lose your mind, please call our spa — sanity is often restored with a good foot massage.”

The culture is embraced

Many older adult service organizations talk about their cultural philosophy or implementing culture change for their residents, but talking about it and achieving it are two different things. According to resident, customer, and employee surveys, it is clear that the Mather LifeWays culture is having an impact on customers and employees.

Ongoing measurement and monitoring of customer satisfaction show consistent outstanding performance in all areas of MLW operations.

- Mather LifeWays reports a 98 percent overall resident satisfaction rate (results from Life Service Network’s Confidence Satisfaction Survey in 2011).
- Nearly 100 percent of residents say they are satisfied with staff, feel safe and secure in their communities, and are satisfied with their quality of life.
- In a survey of customers participating in Mather’s — More Than a Café wellness programs, 79 percent said they had tried new things as a result of the programs, 74 percent said they had improved their health behaviors and their overall health.

Customers said that participation in programs made them more self-reliant, enhanced their lives, and helped them pursue things meaningful to them.

MLW conducts a bi-annual internal employee survey and participates in an annual employer survey by the *Chicago Tribune*. Approximately 89 percent of employees participated in the 2010 Employee Quality of Work Life Survey, and in 2010 and 2011, MLW was named one of Chicago’s Top 100 Workplaces. MLW has also received the Excellence in the Workplace award from LeadingAge, and the Com Psych Silver Award for wellness in the workplace.

Clearly, MLW is having a positive impact on the lives of employees, who in turn bring their satisfaction and fulfillment to their interactions with each other and with customers. Employee retention rates for MLW communities are outstanding when compared to state and national rates. In 2011, the turnover rate for nurses at Mather Pavilion was just 7 percent, while the rates nationally and in Illinois were both 46 percent (national rates based on survey of long-term care facilities; Illinois rates based on Life Service Network’s annual survey).

Maintaining and advancing quality is an organization-wide effort.

ORGANIZATIONAL FOCUS ON QUALITY

MLW communities span the breadth of senior living options, from the Mather Pavilion skilled nursing community in Evanston, to the CCRCs in Tucson (Splendido) and Evanston (The Mather), and the intimate neighborhood convenience of Mather Place of Wilmette, an independent living community in Illinois.

MLW also takes its mission into the neighborhoods where older adults live. Three Chicagoland Mather’s — More Than a Café locations serve meals and support older adults in continuing to live, work, contribute, and play. In partnership with churches, health care providers, and senior services organizations, Mather Edgewater connects older adults with opportunities to grow through

festivals, wellness programs, caregiving resources, and volunteering. These programs are not feeders to the organization's other service and residential offerings, they are designed to meet specific community needs.

Maintaining and advancing quality is an organization-wide effort. Employees, staff, and experience directors are deeply involved in the risk management and quality improvement processes. Unless she is traveling, CEO Mary Leary attends every risk management and quality improvement meeting to reinforce the belief that quality improvement starts at the top. MLW deploys the best practices of utilizing root cause analyses to learn and improve, and monthly dashboards to review and track critical issues, like regulatory compliance, survey results, monthly safety walkthroughs, mock OSHA audits, and tornado drills. MLW also tracks readmission rates to understand and communicate the organization's value to area hospitals.

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One of the most important indicators of success in any older adult service organization is the feedback from customers and employees (satisfaction and turnover). MLW's results in both areas are outstanding, but that wasn't good enough for the board of directors, which set a new benchmark by asking the organization and its staff to improve their 2012 results by another 10 percent — a tall order since satisfaction levels were already nearing 100 percent.

The Center for Medicare and Medicaid Services has given The Mather's Life Centre, and Mather Pavilion five-star ratings following its annual survey on a variety of quality and performance metrics.

FINANCIAL STRENGTH AND STABILITY

While five Chicago-area CCRCs filed for bankruptcy during the recent recession, Mather LifeWays, benefits from a generous endowment that enables it to grow and continue undertaking innovative endeavors. Its leaders have adopted a conservative and thoughtful approach to the use of both endowment and resident funds. This approach includes:

- 1) **Strong stewardship of the endowment:** In a typical year, MLW aims to spend approximately 4.5 percent of its endowment in fulfilling its mission of creating Ways to Age WellSM. In fact, the organization's leadership notes that operating losses are

“purposeful spending as part of our mission.” Even so, MLW took a more conservative approach to its mission spending during the most recent recession in order to better preserve its endowment.

- 2) **A financially sustainable operating model:** Leadership has deliberately established financial practices that ensure monthly fees, not entrance fees, cover operating costs at its CCRCs. This puts the organization in a position to refund entrance fees within the terms of the contract (150 days or less) and lessens its vulnerability to swings in turnover.
- 3) **Strong debt management:** The Mather's two-phase construction began in 2007 and was completed in 2012 at a cost of \$200 million; just \$27 million of that debt remains today, with the balance scheduled for repayment in the coming year. A substantial endowment also remains.
- 4) **A collaborative approach to cost cutting:** Rather than dictating targets of budget cuts in 2009, MLW sought input from employees to achieve an 18 percent budget reduction without staff layoffs. This approach gave employees a greater sense of ownership in their jobs and the organization's success.
- 5) **Strong lender relationships:** MLW leaders have diligently cultivated strong relationships with lenders, and then publicly lauded those institutions for their support. The result: financial institutions want to be a part of the solutions that MLW offers. Many have become enthusiastic supporters as well as creditors. This investment in relationships paid off when lenders eliminated covenant requirements early following the organization's 2009 major capital replacement project in Evanston.

FOCUS ON WELLNESS

MLW's mission of creating Ways to Age Well for its customers also extends to its employees. They know that healthy employees stay in a job longer, perform better, and serve customers with greater enthusiasm. MLW provides a variety of wellness programs designed to increase and sustain healthy behaviors and encourage employees and customers to try new things. The MLW employee benefit program encourages vacation, “repriorment,” and “learning to age well” programs such as cooking classes, foreign languages, health screenings, smoking cessation, and even financial health.

Nearly 90 percent of employees who participated in health screenings at MLW's annual wellness fair say they have made positive lifestyle changes as a result. Employees are offered discounts on health insurance premiums if they make certain lifestyle changes and enhance wellness.

About CliftonLarsonAllen

CliftonLarsonAllen's ThirdAge Solutions provides you with unique capabilities and a team of diverse professionals to guide you through today's increasingly complex aging-services issues. These capabilities aligned with our national health care practice help to achieve our vision of being thought leaders impacting the future of health care. We are committed to serving the health care industry and accomplish this with more than 300 health care professionals operating in every region of the country. Your success is our success. CliftonLarsonAllen is one of the nation's top 10 certified public accounting and consulting firms. The firm has a staff of more than 3,600 professionals, operating from more than 90 offices across the country. For more information about CliftonLarsonAllen, visit www.cliftonlarsonallen.com.

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In 2011, employees showed improvement in 18 out of 22 key health risk factors. Health insurance premiums for 2012 increased only modestly as a result of MLW's focus on wellness. Similar savings have been confirmed for 2013.

Caregiver initiative

Mather LifeWays also makes significant contributions to the field of older adult services through national initiatives, surveys, programs, and research studies conducted by its Institute on Aging. The Institute's many programs are focused on person-centered care, enhancing the quality of life of aging adults, caregivers, and senior living professionals.

One such program began with the recognition that an aging population is placing stress on resources and people throughout our society. MLW implemented a demonstration project in 2000 to provide online guidance and resources for employees who are caregivers for older adults. Other employers not in the senior care industry soon recognized the value that such a program could bring to their employees, and MLW has since assisted in implementing caregiver support programs in six Fortune 100 companies with employees in 11 countries. For information on the available resources, visit: www.matherlifewaysinstituteonaging.com/family-caregivers.

CONGRATULATIONS

CliftonLarsonAllen and LeadingAge congratulate Mather LifeWays, its board, experience directors, staff, and employees on receiving the 2012 Pathways to Greatness recognition. Mather LifeWays embodies the Pathways to Greatness goals in so many ways that it is impossible to detail them all here. We encourage you to learn more about the initiatives described above and other endeavors at Mather LifeWays by calling 847-492-7500 or visiting www.matherlifeways.com.

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About Mather LifeWays

Founded in 1941, Mather LifeWays' mission is to enhance the lives of older adults by creating Ways to Age WellSM. The multi-faceted nonprofit organization offers services in three areas: senior living communities, neighborhood programs, and research and education programs. The MLW board, administration, and employees are continuously improving and setting higher expectations without losing sight of the organization's mission and core values.

About the Pathways to Greatness Program

Now in its sixth year, the *Pathways to Greatness Program* (P2G) is designed to recognize high quality aging-services organizations for excellence. P2G honoree organizations are selected by an industry expert panel based on five key attributes of a successful aging services provider, and the ability to inspire public trust and confidence. CliftonLarsonAllen, a top 10 national CPA, consulting, and advisory firm, and LeadingAge, a global network of not-for-profit aging services organizations, sponsor the nationwide initiative to help improve the quality of senior living providers.