



## 2013 Pathways to Greatness

### A Recognition Program for Aging-Services Organizations

Bethesda Health Group, Inc. has been selected as the 2013 Pathways to Greatness honoree. This year's application illustrated a maturation of many of its programs and services. Bethesda also demonstrated strength in its responsiveness to consumer needs and expectations, its commitment to integrating technology to improve care and demonstrate outcomes, and its extensive community partnerships.

#### **Bethesda Health Group, Inc., St. Louis, Missouri**

Bethesda provides a comprehensive array of skilled nursing, residential and community care, service, and support options for seniors in St. Louis. Bethesda also offers many services free of charge to help its residents and other community-based seniors remain independent while providing peace of mind to their families. Bethesda's pervasive commitment to serving its residents has made it a key partner in the St. Louis health care community. The organization's holistic approach encompasses everything from the way it uses data to manage quality outcomes to its dedication to building careers for its employees.

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## Recognizing and responding to evolving consumer needs and expectations

Bethesda's focus on its consumer is reflected in the type and location of services it offers, its integration of technology into care delivery, and its extensive partnerships to ensure better coordinated care and outcomes for the people it serves. Bethesda has developed a series of integrated programs and services to support "aging in place" that not only identify the residents' needs, but also deploy services to them.

Like many senior service organizations, Bethesda offered traditional private duty nursing services in its communities and independent living apartments. In 2011, it re-envisioned these services and launched its Senior Support Solutions program. This program, under the supervision of Amy Trau, senior vice president, healthcare services, offers customized bundled service packages that combine typical private duty services with needed home health care. This approach delivers services more cost-effectively for the consumer and the family. The bundled packages range from a "Rise and Shine" program, which includes services for needs that occur upon waking, to a complete "Meet My Needs" program, in which the resident and family select from many different service options.

To complement the Senior Support Solutions effort and respond to declining occupancy, Bethesda piloted a Geriatric Care Management program and established office hours for a certified geriatric care manager to field questions from residents in their senior living communities. Its rapid success and popularity prompted leaders to create a new position and fully develop the program, including the addition of a community care coordinator to staff an information line available to both Bethesda residents, and non-Bethesda seniors and their families.

The geriatric care manager's role is to assess what residents need to remain independent and reinforce that Bethesda supports residents aging in place. Through the Geriatric Care Management program, it was discovered that residents had sometimes been afraid to ask for help out of fear that they would be asked to leave their independent living apartment. Sometimes the solution was non-medical and simple. For example, one daughter concluded that her mother wouldn't leave her apartment because she was afraid the heavy front door might cause her to fall. The Bethesda team merely replaced the old door with one that was easier to open, which eliminated her fears and allowed her to remain in her apartment and enjoy her current lifestyle.

Integral to the success of the Geriatric Care Management program is that all housekeeping, maintenance, and



Joseph J. Brinker, President and CEO,  
Bethesda Health Group, Inc.

caregiver staff have been trained to identify and report changes in a resident's condition to the Senior Support Solutions team. This helps ensure that the resident's needs are identified early, and services are delivered that enable them to remain independent.

The unique program also follows Bethesda residents to the hospital to coordinate care when an admission occurs. Bethesda's commitment to following its residents through the health care continuum, along with its partnerships with other community providers committed to lowering hospital readmissions and coordinating care, has provided referring hospitals with confidence in discharging residents back to Bethesda communities. The result has been service referrals to resources both within and outside of Bethesda, and a 27 percent reduction in attrition from Bethesda's senior living buildings.

What is most unusual about the consultations provided by the Geriatric Care Management program and other wellness program initiatives offered to independent living residents is that these services are provided free of charge.

Whether it's a new program developed specifically to serve residents better or investing in new technology to track outcomes more efficiently, Bethesda commits to improvements for the health of its clients as well as the health of the organization itself.

In the physically and emotionally demanding aging-services industry, many organizations struggle with high staff turnover rates. Bethesda leadership, led by Kathy Joslin, senior vice president, human resources and marketing, has made concerted efforts to address turnover by strengthening its entire human resource process, from hiring new employees to ensuring competitive benefits and wages.

One particularly challenging position to hire and retain is the certified nursing assistant. To improve the hiring process, Bethesda uses the Insure survey, a prescreening tool designed to gauge empathy, integrity, and caring qualities in applicants. Candidates take the survey and are then asked follow-up questions to further validate the results. Bethesda leaders believe the survey tool has helped keep its turnover rate well below the national average in this difficult job category.

Bethesda also emphasizes professional development and long-term career opportunities for employees through a number of different education programs, such as:

- The Bethesda Institute
- School at Work
- LPN to RN
- Certified nurse assistant training (in conjunction with St. Louis Community College)
- Tuition reimbursement

In fact, Bethesda underscores its commitment to employees by including the phrase, "... providing fulfilling career opportunities" in its mission statement. This commitment to employees has resulted in Bethesda being recognized as one of the "Best Places to Work in St. Louis" by the *St. Louis Business Journal* for the past two years. "We simply want to provide a good environment for employees," says Joe Brinker, CEO of Bethesda. "One staff member joined Bethesda as a food service worker when he was in high school. He's been with Bethesda for 15 years, and today he is the general manager of one of our senior living communities."

"Our attitude in approaching partnerships is to be good listeners. We're willing to talk with anyone about anything. We cultivate an attitude of openness." says Al Poelker, senior vice president, long-term care.

### Financial challenges

Bethesda has had a healthy balance sheet for many years but couldn't escape the 11.1 percent cut in Medicare funding nor the 2 percent sequestration cut in 2011 – 2012, which hit their 620-skilled nursing bed organization hard. However, leadership responded pragmatically by reducing expenses by \$2.8 million, refinancing its debt, and concentrating on strengthening its cash flow. Although Bethesda was meeting all of its debt covenants and was still well-positioned financially, leaders continued

outreach to the community to talk about their focus on quality and outcomes, and maintained strong relationships with their referral sources. The combination of back-to-basics financial measures and reaching further into the community to strengthen referrals has increased their independent living occupancy rates to over 90 percent and helped their skilled nursing facility census numbers exceed their budget for 2014.

### Integrating technology to improve care and demonstrate outcomes

Bethesda realized early on that technology was a vital part of the changes within the health care industry. Instead of just thinking of it as a cost center and necessary evil, the leadership viewed it as a tool to further its mission and vision. This shared vision about technology's importance and role guides the organization's approach.

Bethesda's technology team concentrates on the solution rather than product selection. Typically, the technology team examines staff needs and process needs to determine how technology can help address those needs. Once the team's analysis is complete, the strategy is created. Only then does product selection enter the discussion.

Strategy helps identify the appropriate products and tools and then builds connectors between them. Because product selection is based on analysis, if a particular product no longer meets the need or is no longer offered in the market, the organization can choose a new solution that better serves its needs.

A sampling of the products Bethesda is using in 2013 includes:

- One-record access system, which provides a single record of care by collecting appropriate data from all software products used within the organization, independent of service or location
- Cerner HomeWorks EMR application, which Bethesda helped Cerner Corporation develop for use in long-term care environments
- Biometric log-ins, to ensure an efficient and secure environment

While Bethesda has made significant investments in technology, they admit they are only part of the way down the path to where they need to be for a reforming environment. As Bethesda's senior vice president, administrative services and chief information officer Larry Hickman explains, "For us to succeed in the future, we need to understand costs by patients and by diagnoses, and we need to view outcomes in real time so that we can manage quality. We need technology to help us do that."



Consequently, Bethesda consistently invests in technology infrastructure necessary to facilitate ongoing efficiencies. When upgrades are required, Bethesda's approach is calculated and pragmatic: leaders carefully examine their processes before they invest, so they aren't tempted by all the "hot" products on the market that might look appealing but wouldn't effectively meet their needs.

"You need to locate your organization in the future," says Hickman, "then you invest in technology that will get you there."

Bethesda's technology investments have provided the tools to identify, track, and report performance metrics to help illustrate its efficiency to partners, and differentiate itself in the marketplace. The organization's one-record access system not only helps operations run smoothly, it demonstrates how its data, efficiency, and processes can make it an attractive collaborator.

### Embracing a diversity of partnerships

The leadership team at Bethesda consistently asks how they can be an asset to the community. "We want to give back as well as learn from the community," says Al Poelker, the current senior vice president, long-term care. In his new role as senior vice president, strategic development, Poelker will be responsible for identifying and bringing potential future partnerships to fruition.

One of Bethesda's most noticeable strengths is the quantity and diversity of the relationships it nurtures in the St. Louis community. Its partners include the Alzheimer's Association, the State of Missouri (on a workforce initiative), the regional Chamber of Commerce, community-based senior care organizations, Meals on Wheels, and even a local realtor. What distinguishes it from similar organizations is its persistence in initiating relationships and the willingness to move forward, even when it meets resistance. Often, Bethesda leaders don't exactly know how they want to work with another organization, but they begin the relationship with a conversation.

Bethesda has wisely positioned itself as a strong collaborative partner to take advantage of the opportunities provided by health reform. To help accomplish this, its leadership team added a new strategic development position to pursue the opportunities for prospective community affiliations. They are far ahead of some organizations in recognizing that the future will be filled with partnerships, and Bethesda is working to develop these relationships right away — in some cases, before partners are prepared to engage with them.

Hospital partnerships proved especially challenging early



The steering committee for the annual United Way campaign includes employees, former employees, and representatives from all the business units of Bethesda.

on, because hospitals are typically focused on shoring up their acute care services and relationships before identifying and building connections with preferred long-term and post-acute care providers. "We have to be more forceful with hospitals and tell them we want to be part of their programs," says Pat Kapsar, senior vice president, compliance. "We have to meet with them to show them how we might collaborate."

For example, when Bethesda leaders tried to connect with their key referring hospitals, hospital leaders said they weren't ready. Instead of waiting, Bethesda identified key performance metrics that demonstrated their value proposition to illustrate that they would be a good partner. Leadership developed a dashboard report and shared it unsolicited with their key referring hospitals/systems. Now, as these same hospitals are thinking about the role of post-acute providers, they are including Bethesda as a preferred provider in their networks.

Because this new era lacks examples of how organizations will interact with each other in the future, Bethesda is wisely positioning itself as flexible and functional to a variety of partners in the community. "A lot of organizations don't know how to interact as partners," says Poelker. "So our attitude in approaching them is to be good listeners. We're willing to talk with anyone about anything. We cultivate an attitude of openness."

### How does the future look for Bethesda?

Bethesda's leaders have a good idea of how their future will look because they consistently use a strategic planning process as a guide. And it is no coincidence that elements of health reform figure prominently in their future.

Their strategic plan includes the following:

- Embracing the recommendations of health reform
- Implementing an “aging in place” strategy to serve the expressed needs of their next generation of consumers
- Using technology to improve efficiency
- Using data to demonstrate outcomes
- Collaborating and partnering with other organizations

In some ways, the elements appear to be common sense. But as many high-performing organizations demonstrate, one of the secrets to success is approaching the obvious or simple — for instance, technology and relationships — with both precision and grace.

### Conclusion

CliftonLarsonAllen and LeadingAge congratulate Bethesda Health Group, Inc., its board, and its staff on receiving the 2013 Pathways to Greatness recognition. Bethesda’s example offers encouragement to the health care community that is striving to improve and evolve.

### About Bethesda

Bethesda Health Group provides exceptional senior living care and services through its retirement communities, skilled nursing communities, and home- and community-

based services. Bethesda is committed to offering a complete continuum of care — from independent retirement apartment homes to assisted living, skilled nursing, and innovative memory care environments. The nonprofit organization is comprised of more than 1,200 employees. It responsibly invests in upgrading physical facilities, cutting-edge medical technology, and ongoing employee training. In addition, the Bethesda Health Group Foundation supplements fees for residents who are unable to pay. For nearly 125 years, the caregivers at Bethesda have been dedicated to providing supportive and caring environments for seniors. For more information on Bethesda programs, call 314-800-1911.

### About the Pathways to Greatness Program

Now in its seventh 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 national CPA, consulting, and advisory firm, and LeadingAge, a global network of nonprofit aging services organizations, sponsor the nationwide initiative to help improve the quality of senior living providers.

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