



## Pathways to Greatness: Improving Quality and Delivering Value

The *Pathways to Greatness Program* (P2G) recognizes high-quality aging-services organizations for excellence in programming and a strong commitment to quality improvement. This white paper describes what has been learned from exploring the workings of some of the most successful aging-services providers in the field.

P2G honoree organizations are selected by an industry expert panel that assesses applicants on five key attributes of successful aging-services providers. CliftonLarsonAllen, a national accounting, consulting, and advisory firm, and LeadingAge, a global network of nonprofit aging-services organizations, sponsor the nationwide initiative to help improve the quality of aging-services providers. The rigorous application process requires eligible organizations to share financial and operational details with CliftonLarsonAllen and its expert panelists to compare applicants' data to industry benchmarks.

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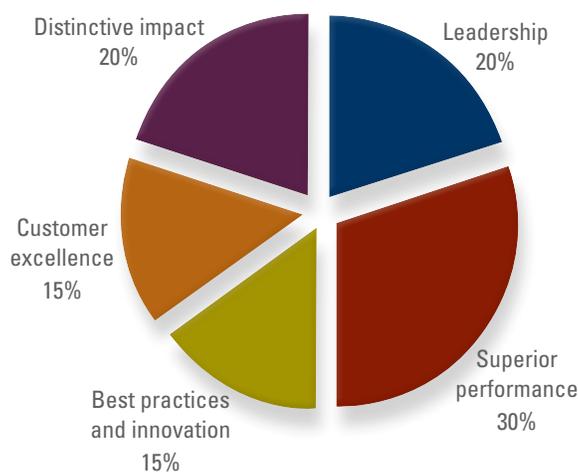
## Elevating quality in aging-services organizations

Publicly recognizing organizations that are successfully improving quality is one way to educate others in the industry about best practices. By highlighting extraordinary programs, we hope to inspire other aging-services providers to aggressively pursue the improvements in quality that will be necessary to thrive as health reform continues to reshape the health care industry. It has been encouraging to observe over the past six years of the P2G program, that if an organization passionately pursues quality in broad terms, the financial side of the equation is inevitably strengthened as well.

P2G focuses on five primary attributes of high-quality aging-services organizations:

- Leadership
- Superior performance
- Distinctive impact
- Customer excellence
- Best practices and innovations

Many organizations perform well in one or two of these categories, but those recognized by the P2G program — the ones who are focused on improving quality and delivering value — demonstrate success in all five areas.



\*Categories are weighted for evaluation purposes

### Leadership

Leadership and culture are central to high performance. Leaders of organizations that have been honored by the P2G program have an unwavering focus on the needs of residents. In assessing the strength of an organization's leadership, we generally observe the leadership team as well as the board of directors. These key people influence the culture and set the tone of the workplace.

P2G honorees have taught us the following about leadership:

- A committed and engaged leadership team models the cultural behaviors they value.
- Close working relationships between leaders and staff facilitate this transfer of knowledge.
- Strong leaders encourage ideas from anyone.
- Aging-services organizations with distinguished performance records have leaders who measure performance, provide feedback, and strive for improvement.
- Identifying the specific skills needed on the board results in a well-rounded board that is capable of fulfilling its strategic directives.

The leadership of Mather LifeWays (MLW), the 2012 P2G honoree, embraced unique brand ideas that now permeate the culture. Throughout the organization, the color orange became a rallying point and a mark of distinction that reminded everyone of MLW's differences. 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.

Foulkeways at Gwynedd, the P2G honoree in 2010, demonstrated extraordinary vision regarding its leadership. To meet the future needs of residents, they gave their CEO a three-month sabbatical to explore new services and programs offered around the country. During this time, a competent senior leadership team stepped in to manage the day-to-day operations of the organization. This innovative and visionary board helped build the strength and vision of their leader, which in turn has improved the organization as a whole.

### Superior performance

P2G honorees have also taught us much about performance improvement. Organizations that routinely utilize dashboards or other tracking and reporting tools have the greatest success in achieving their specific performance goals. Tracking tools help organizations identify which areas need the most improvement, and then require staff at all levels to focus on those issues. They also offer staff a view of their progress toward the goal. Other findings brought to light by the P2G program demonstrate that:

- Using performance tracking tools helps measure the effectiveness of programs and leads to better care, as well as stronger financial performance.

- Attention to improvement can also benefit morale and offer opportunities to recognize and celebrate group or individual successes.
- Superior performance is closely linked to a culture of improvement.

Long before health reform established the need for such tools, Mary Wade Home, the 2007 P2G honoree, had integrated a quality dashboard into their regular routine with staff and in their communications to the board.

The 2011 P2G honoree, Deerfield Episcopal Retirement Community, Inc., sought to reduce resident infection rates and staff illness by improving hand washing protocols. As a result, resident infections (urinary tract, upper respiratory, and wound infections) decreased by 30 percent in two years. Staff illness also declined. The overall result was improved quality of life for the residents as well as cost savings for Deerfield.

When the 2008 honoree, Jewish Geriatric Services, Inc., wanted to find a way to retrain and attract clinical staff, it implemented the Journey to Nursing Excellence Program sponsored by the American Nurses Credentialing Center. The program is executed through six shared governance councils that work to increase staff input and influence, improve clinical quality, and improve employee satisfaction.

### Distinctive impact

The P2G program highlights innovative thinking in an organization by trying to quantify its distinctive impact. Though the category is open to interpretation, past honorees have demonstrated distinctive impact in a variety of ways:

- Many overtly position themselves as good stewards of local resources.
- Aging-services organizations that participate in research on older adults and share it with the industry contribute to a better understanding of aging issues at the local level.
- Providing continuing education opportunities for residents, staff, and community members enriches the overall community.
- Many organizations participate in community programs to contribute to a vibrant local environment.

The 2009 P2G honoree, Well•Spring, encourages management to “pursue their passion” by including an annual community involvement goal in their performance plan. Well•Spring is involved either financially or through staff volunteering in more than 47 different community and industry-related organizations.



The 2009  
Pathways to Greatness Award

Strong leadership inspires superior performance. Superior performance has a distinctive impact. Best practices and innovations contribute to superior performance. The boundaries between the categories are sometimes hard to distinguish.

In 1997, the Carol Woods board began a systematic review of how the organization participates and demonstrates their commitment to their community. As a result, several initiatives were developed. For instance, Carol Woods sponsored a summer camp on campus for children with special needs for many years. In 2006, its residents received the Social Accountability Award from the North Carolina Association of Nonprofit Homes for the Aging for this effort. Carol Woods also collaborates with more than 15 higher education institutions and school districts to provide training and local internship and research opportunities.

Other honorees have developed relationships with universities or educational institutions, and participate in formal research projects. Foulkeways embraced a unique idea presented by a resident committee, and the responsive board of directors incorporated the 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 have installed energy-saving windows and doors, low-flow toilets, and water-saving shower heads. The result was a 6 percent reduction in electricity and a 46 percent reduction in water usage. They are also phasing-in geothermal heating and cooling systems in 261 units. They are tracking their progress towards their goal and using real-time data to affect behavior and to educate the entire Foulkeways’ community.

Because of the Green Technology Project, Foulkeways also eliminated the use of pesticides, reduced land maintenance needs (e.g., mowing and watering), and preserved green space on the campus. Local beekeepers from Drexel University maintain three hives of honeybees in an area that has been allowed to grow wild to reduce the frequency of mowing. Community members benefit from the honey produced by the bees and the pollination of the plants and flowers at Foulkeways.

### **Customer excellence: public trust and confidence**

High-performing aging-services organizations understand the importance of communication inside the organization and within the communities they serve. They seek out information, and they respond decisively when they receive complaints or suggestions from residents, employees, or community members. Strong P2G applicants have the following in common:

- They develop communications tools to engage residents and encourage feedback.
- Leadership respectfully addresses issues raised internally or externally.
- They use feedback tools, such as peer reviews, employee surveys, or focus groups.

One of the important goals of the P2G program is to highlight the successes of extraordinary organizations in order to inspire other aging-services providers to pursue improvements in quality.

The leadership at Deerfield responded to both employee feedback and resident preferences to address staffing concerns. Deerfield adjusted its staffing ratio to 4.2 hours/resident/day, which is twice the state requirement and 0.6 hours 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 assigned personnel to care for the same residents every day, which resulted in lower staff turnover, improved resident outcomes through more accurate documentation and observations by the assigned caretakers, and cost savings.

Foulkeways requested architectural plans be redrawn for a campus redesign project following extensive input from residents. While it cost money and time to redraw the plans, the new project plan cost \$2 million less than the original proposal and had resident buy-in.

MLW is deeply committed to quality and communication. It reports a 98 percent overall resident satisfaction rate,

based on 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.

Having systems in place to facilitate communication demonstrates a receptiveness to input and, perhaps more important, an openness to change.

### **Best practices and innovations**

One of the important goals of the P2G program is to highlight the successes of extraordinary organizations in order to inspire other aging-services providers to pursue improvements in quality. Successful innovations often use the latest technology and tap into or establish best practices in the industry. However, over the years, the P2G program has taught us that many unique programs are initiated by staff or residents.

The Mary Wade Home demonstrated its commitment to the community even when resources were limited. They developed a project using municipal and federal grants to help buy and renovate neighborhood properties to serve low income families. They further invested in the neighborhood by installing additional street lamps and participating in the Block Watch program. Their approach was creative, cost effective, and directly aimed at solving neighborhood issues.

Well•Spring's Growing Green initiative embraces innovation by exploring and implementing alternative energy sources. Well•Spring now utilizes solar energy to pre-heat water for the kitchen and dining facilities. They use Energy Star appliances, coreless paper towel and toilet paper dispensers, and they recycle appliances through the Habitat Restore Program.

### **Conclusion**

Over several years of screening applicants for the P2G program, we've been inspired by the leaders and the organizations who continuously strive to improve their programs and the lives of their residents. We have learned that, as much as we try to objectively assess and quantify the five P2G attributes, these areas are intertwined. Strong leadership inspires superior performance. Superior performance has a distinctive impact. Best practices and innovations contribute to superior performance. The boundaries between the categories are sometimes hard to distinguish.

Many applicants are strong in one or two of the attributes — which is encouraging. However, when an organization has all five of the attributes, the results are profound. And performance — from staffing turnover rates to

patient satisfaction to financial outcomes — is nothing less than extraordinary.

The Pathway to Greatness has many roads. Those involved in the aging-services industry will meet many fellow travelers along the way. The honorees of this program are leading the way, and we all have much to learn as we follow along, observing their successes and using their wisdom to find our own path.

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