

2014 Annual Report



WWW.THECEAL.ORG

LETTER FROM THE CHAIR

It was my distinct pleasure to serve as the Board Chair for the Center for Excellence in Assisted Living (CEAL) as we completed our first decade in 2014. CEAL is an unusual organization, bringing together 11 national organizations to find common ground and speak with on issues critical to excellence in assisted living. This mission leads us into many areas, including research, public policy, affordability, and best practices.

Over its 10-year history, CEAL has fulfilled our mission by leveraging the knowledge and experience of our board members to engage in a variety of activities, including:

- Hosting symposia in 2004, 2005, 2006, 2008, and 2014 on topics related to excellence in assisted living, including affordability, medications management, infection control, person centered care, assisted living's key components, and its place in the home and community-based care spectrum (2004–2014)
- Publishing white papers, letters, and reports based on the symposia and other collaborative efforts (2005–2014)
- Partnering with the University of North Carolina to research and create a manual about Community-Based Participatory Research (CBPR) in long-term care (2008) and a Toolkit for Person-Centeredness in Assisted Living (2014)
- Collaborating on AHRQ's Assisted Living Disclosure Collaborative (2006 – 2008)
- Creating and publishing a pocket guide for medication administration with the American Society of Consultant Pharmacists (2009)
- Creating and publishing a pocket guide for infection control in partnership with Med-Pass (2011)
- Providing technical expertise to the National Center for Health Statistics (NCHS) National Survey of Residential Care Facilities (2010 to present)

As CEAL celebrated our first ten years, the Board of Directors also wanted to look forward. We worked throughout 2014 with a keen awareness of the new challenges facing excellence in assisted living, including healthcare reform and its many demands on long-term care, heightened consumer and family expectations regarding self-direction, and the rapidly increasing older population. The convergence and interplay of these significant issues will demand advocates' and providers' continued focus on assisted living's core principle of resident direction while we all work to evolve key practices. CEAL's support of this evolution over the next 10 years will be as important as ever to insure assisted living's continuing role as a pioneer in high quality and affordable community-based long-term care.

To understand where CEAL can best support this evolution, CEAL hosted a diverse stakeholder symposium in October. "The Future of Assisted Living: Consumer Preferences and the Era of Healthcare Reform" focused on assessing the current state of assisted living and visions for its future. The findings from the symposium are shaping our 2015-2020 strategic plan.

The CEAL Board of Directors looks forward to working with all assisted living stakeholders to realize our mission and strategic plan. As we begin this next phase, we want to express our deep appreciation to the organizations and individuals whose hard work and generosity have gotten us to this point. We especially want to express our thanks to Don Redfoot who retires from the AARP this year. Don led the charge to form CEAL and has worked tirelessly as a board member and advisor over the last ten years. Don's wise, patient, and inclusive approach contributed immeasurably to CEAL's vision and accomplishments. CEAL would also like to recognize Don's broader contributions to the transformation of long-term care as one of the most effective advocates for person-directed home and community based care over the last 3 decades. We know he is not finished with his work and for that, we are very grateful.

Sincerely,

Robert Jenkins

Board Chair, Center for Excellence in Assisted Living

Director of Social Impact Initiatives, National Cooperative Bank (NCB)

THE CEAL VISION, MISSION AND GUIDING PRINCIPLES

VISION

CEAL envisions a society that supports quality of life for all individuals and their right to age with respect and dignity.

MISSION

CEAL is a national coalition of diverse stakeholder organizations dedicated to advancing excellence in assisted living.

GUIDING PRINCIPLES

CEAL supports assisted living communities that:

- Are licensed and operate in accordance with all applicable laws and regulations.
- Are person-centered, consumer driven and actively engaged with the community at large.
- Foster the professionalism of their work force through education, training, sharing of best practices, as well as providing competitive wages and benefits that reflect the local market area.
- Advance programs, policies and research to ensure high quality person-centered care for all residents.
- Provide access to high quality assisted living for all individuals, regardless of income.
- Operate in a responsible, ethical, and professional manner.

A UNIQUE ORGANIZATION

CEAL is a non-profit collaborative of 11 national organizations representing a unique balance of key stakeholders in assisted living including: four consumer advocacy organizations; four assisted living provider organizations; an organization focused on promoting the availability of affordable assisted living; a national assisted living nurse's association; and an organization focused on championing quality for aging services. A member from each organization comprises the 11-member volunteer Board of Directors.

The Center for Excellence in Assisted Living (CEAL) was created as an outgrowth of a national initiative known as the Assisted Living Workgroup (ALW). The ALW was formed at the request of the U.S. Senate Special Committee on Aging in 2001. Nearly 50 organizations representing a broad range of stakeholders came together over the course of 18 months to develop consensus recommendations to assure quality in assisted living. The 110 recommendations were presented to the Aging Committee at a hearing held in April 2003.

The first ALW recommendation was to form and fund an entity to continue the work of the ALW and to serve as an ongoing information clearinghouse. The recommendation further stipulated that the entity should include a governing board comprised of diverse key stakeholders. Eleven of the key stakeholder organizations involved in the ALW formalized this recommendation to create CEAL. CEAL was incorporated in the District of Columbia in November 2004 and subsequently granted 501 (c) (3) status by the IRS.

CEAL promotes high-quality assisted living in a variety of ways. Serving as a convener, CEAL brings together diverse stakeholders and thought leaders to examine issues related to assisted living. CEAL also helps to bridge research, practice and policy gaps that foster quality and affordability, and maintains an objective national center of information and resources about assisted living.

For more information about CEAL, please visit www.theceal.org.



CEAL ADVISORY COUNCIL

The CEAL Advisory Council was formed in 2005 and includes a diverse representation of the assisted living stakeholder community. In 2014, the volunteer Advisory Council met three times in Washington, DC, including attendance at the 2014 CEAL Assisted Living Roundtable Symposium, and served a critical role in developing recommendations that help to shape and inform CEAL's annual goals and objectives.

To advance quality in assisted living, the CEAL Advisory Council:

- Provides a forum for a diverse representation of stakeholders to discuss key topics of importance to assisted living
- Facilitates exchange of information and ideas related to current developments in areas such as research, technology and affordability.
- Raises timely policy issues and provides recommendations for the CEAL board's consideration.

CEAL ADVISORY COUNCIL PARTICIPANTS

Bev Laubert

Ohio Department of Aging

Bonnie Ruggles-Ruechel, ACC/EDU, AFL, MC

National Certification Council
for Activity Professionals

Chris Herman, MSW, LICSW

National Association of Social Workers

Dan Haimowitz, MD

American Medical Directors Association

Dan Timmel

Centers for Medicare and Medicaid Services

David Farrell, MSW, LNHA

NCB Capital Impact

Deb Merrill

National Association of State Units on
Aging and Disability

DEB Potter

DHHS, Office of Disability, Aging,
and Long-Term Care Policy
Office of the Assistant Secretary
for Planning and Evaluation

Joan Baird, PharmD, CGP

American Society of Consultant Pharmacists

Judi Lund Person, MPH

National Hospice and Palliative Care Organization

Linda Aufderhaar

National Association of Professional
Geriatric Care Managers

Louise Ryan

DHHS, Administration for Community
Living, Administration on Aging

Marianna Grachek

American College of Health Care Administration

Mauro Hernandez, PhD

Concepts in Community Living, Inc.

Paula Carder, PhD

The Gerontological Society of America

Randy Lindner, MHSA, CAE

National Association of Long Term
Care Administrator Boards (NAB)

Sheryl Zimmerman, PhD

Gerontological Society of America

Theresa Connor

Compassion & Choices

Vanessa Emm, ACC/EDU, AC-BC, CDP

National Association of Activity Professionals

W. Bradford Klitsch

Direct Supply Inc.

■ **Toolkit for Person-Centeredness in Assisted Living** – An Informational Guide and Questionnaires of Person-Centered Practices in Assisted Living (PC-PAL) - Released in July 2014, The Toolkit for Person-Centeredness in Assisted Living was developed through a close partnership between CEAL and the University of North Carolina at Chapel Hill, along with assisted living providers, residents, family members, and organizational representatives. Available for free download, the Toolkit includes questionnaires that measure Person-Centered Practices in Assisted Living, and are called the PC-PAL. [Click here to access the PC-PAL](#). Read the entire press release on the [CEAL website](#) or on the [UNC website](#).



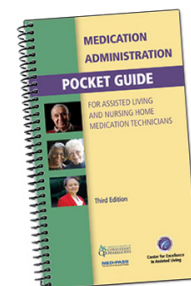
■ **2014 CEAL Assisted Living Roundtable Symposium** - Entitled “The Future of Assisted Living: Consumer Preferences and the Era of Healthcare Reform”, this CEAL event was held on October 9 and 10 in Washington, DC. The symposium was designed to provide a forum for key stakeholders to evaluate how assisted living may need to evolve within the current healthcare landscape to remain a viable senior living alternative. Attendees represented assisted living providers, state and federal government regulators, healthcare professionals, hospitals and healthcare organizations, investors, consumer advocates, provider advocates, researchers and academics. Outcomes include a 2015 CEAL White Paper. Follow-up reports on the event can be found at [LeadingAge](#) and the [ALFA Update](#).

■ **National Center for Health Statistics (NCHS)** — For the fourth year in a row, CEAL worked with this CDC agency on the development and dissemination of a survey designed to collect data on a national scale about the characteristics of long-term care facilities, including assisted living communities. Data collected in the 2014 [National Study of Long-Term Care Providers \(NSLTCP\)](#) is readily available on the CDC website.



■ **Advisory Council Meetings** — In 2014, the volunteer Advisory Council met three times in Washington, DC, in person or via conference call, to discuss and examine current assisted living topics from a diverse stakeholder perspective. Meeting topics in 2014 included “National Study of Long-Term Care Providers: Introduction and Selected Findings,” presented by personnel from the CDC; attendance at the 2-day 2014 CEAL Assisted Living Roundtable Symposium; and, the updated CEAL Vision, Mission and Guiding Principles.

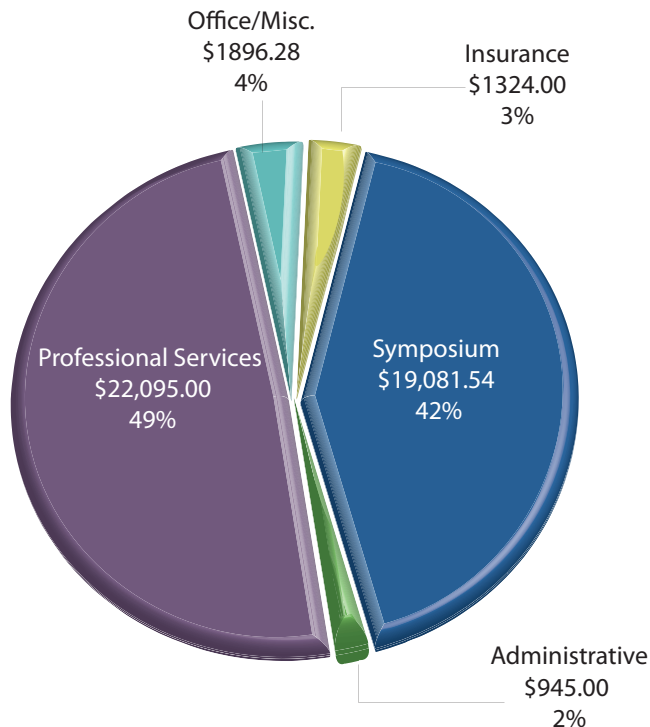
■ **Third Edition Medication Administration Pocket Guide for Assisted Living and Nursing Home Medication Technicians** - Initially published in 2009, this Third Edition was revised in 2014, and includes up-to-date information about Do Not Use Abbreviations, Medication Side Effects and Interactions, and more. This publication was codeveloped by CEAL, the American Society of Consultant Pharmacists (ASCP), and MED-PASS for the purpose of minimizing medication errors and improving resident outcomes.



FINANCIAL HIGHLIGHTS

2014 EXPENSES

Total: \$45,341.82

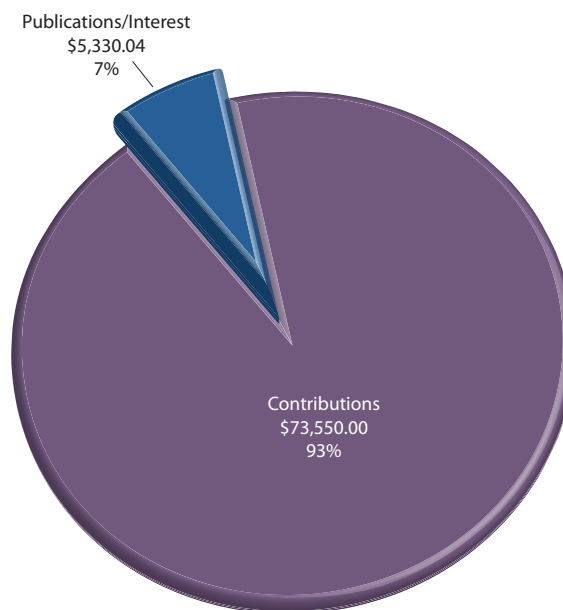


CEAL 2014 expenses reflect a year in transition. In second quarter 2014, a new Executive Director was contracted to fill the open position. Among top priorities was preparing for and executing on the 2014 CEAL Symposium, “The Future of Assisted Living: Consumer Preference and the Era of Health Care Reform”, which represented 42% of annual expenses.

2014 REVENUE

Total: \$78,880.04

CEAL revenues are primarily generated from annual contributions made by the eleven member organizations, who additionally contribute staff time and other in-kind resources. Occasionally donations are made for special projects, like the 2014 CEAL Symposium, by Board and Advisory Council member organizations. In 2014, the CEAL Board voted to hold excess revenues of just over \$33,000 in reserve for future projects.



2015 CEAL BOARD OF DIRECTORS

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