American Nurses Association (ANA) Unveils National Standards for Safe Patient Handling and Mobility (SPHM)

On June 26, 2013, ANA released its publication, Safe Patient Handling and Mobility: Interprofessional National Standards, which was developed by an interprofessional group of subject matter experts including nurses, occupational and physical therapists, safety and ergonomics experts, risk management specialists and others. The Standards apply to multiple health care settings across the care continuum, such as hospitals, long-term care, rehabilitation, hospice, and nursing homes.

The goal of the Standards is to establish a uniform national foundation for SPHM and is intended to guide the development of practices, policies, regulations and legislation aimed at protecting the health and safety of health care workers and health care recipients. (Continued on page 4)
On June 28, 2013, the Centers for Medicare & Medicaid Services issued the following three Survey and Certification memorandums:

- **Public Release of the Five-Star Quality Rating System Three-Year Report** This contains the results of an analysis that examined trends in the first three years of the Five-Star Quality Rating System (2009-2011).
- **Reminder: Access and Visitation Rights in Long Term Care (LTC) Facilities** This reminder emphasizes that residents must be notified of their rights to have visitors on a 24-hour basis, who could include, but are not limited to, spouses (including same-sex spouses), domestic partners (including same-sex domestic partners), other family members or friends.
- **Changes to the Nursing Home Compare Website Data that is Available for Download on the Medicare.gov Website (Effective July 2013)** In July 2013, all users of the Nursing Home Compare website that wish to download the nursing home data will be redirected to the website (https://data.medicare.gov/). There will be new data layouts and additional nursing home data available for viewing and download on the Medicare website.

On July 12, 2013, the Centers for Medicare & Medicaid Services (CMS) issued the following Survey and Certification memorandums:

- **Changes to State Survey Agency Responsibilities in Obtaining Information for Civil Rights Clearances for Initial Certifications and Changes of Ownership (CHOWs)** This memo supersedes S&C: 09-57. A health care provider that applies for participation in the Medicare Part A program must receive a civil rights clearance from OCR, as set forth in 42 CFR 480.10(b).
- **Compliance with the Life Safety Code (LSC) in End Stage Renal Disease (ESRD) Facilities** This includes a Life Safety Code Attestation for Exempt ESRD Facilities.

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New Events/Save the Dates Added on LNHA E-Calendar

New events have been added to the e-calendar. Check the website today to view upcoming dates for conferences and trainings.

**New events include:**
- August 13-14: Director of Nursing Boot Camp (Marksville, Paragon Casino)
- Sept. 23-25: 2013 LNHA Fall Convention (Hilton New Orleans Riverside Hotel)
- October 8-11: Resident Activity Director Certification (Marksville, Paragon Casino)

To register for an event, visit [www.lnha.org](http://www.lnha.org) and click the calendar icon on the homepage and select the appropriate event. Register today, spaces are limited! Some events will be listed on the calendar at a later date.
Prizes Galore!
The Third Annual LNHA Service Corp Raffle Supports the Louisiana Long Term Care Foundation and Benefits YOU & YOUR RESIDENTS, too!

Here’s how it works:

• You purchase as many books of raffle tickets as you wish for a discounted price of $2.50 per ticket (sold in books of 20).

• Sell the raffle tickets to your staff, vendors, and residents’ families for the full price of $5.00 per ticket.

• Use the difference for your activities fund, a special field trip, or an addition to the residents’ lounge. Use it any way you wish!

• If you sell one book of 20 tickets, you will raise $50 for your fund. Sell two books, and raise $100! The more tickets you sell, the more you raise for your residents’ activities!

Everybody Wins!
One lucky winner will receive an Apple iPad and another will win an overnight stay with a golf and dining package at Paragon Casino Resort! The grand prize winner will be the owner of a new 42” smart 3D HDTV!

Most important, several nursing students will win by being awarded scholarships with the funds raised in the raffle. Everyone wins if you pre-sell tickets to benefit your residents’ activities. Plus, if you sell a winning ticket, you receive $100 cash!

☐ YES! I would like to participate in the LNHA Service Corp Annual Raffle Pre-Sales Event!
• Send me _____ books of 20 tickets ($50 per book).
• Enclosed is my check for $___________ (# of books x $50).

Name: _____________________________

Facility: _____________________________

Address: _____________________________

Phone: ____________ Email: _____________

Make checks payable to the Louisiana Long Term Care Foundation.

Payment for pre-sales tickets must be received in advance. Drawings for prizes will be held at the LNHA Fall Convention on Wednesday, Sept. 25. Participants do not have to be present to win.

Return check payment & form to:
Louisiana Long Term Care Foundation Raffle
LNHA
7844 Office Park Blvd., Baton Rouge, LA 70809
225.927.5642 (phone)
For the last decade, the ANA has worked to eliminate manual handling of patients. No broadly recognized government or private sector standards for safe patient handling and mobility exist, and regulations adopted in several states with safe patient handling laws are inconsistent. Nurses are still suffering some of the highest rates of musculoskeletal injuries and illnesses among all occupations, according to 2011 Bureau of Labor Statistics data.

The complete Standards and other useful information can be found by clicking the following links.

- The ANA teleconference can be heard by clicking [here](#).
- The ANA News Release can be read by clicking [here](#).

Members who have questions about this issue should contact Mass Senior Care Associate Member Sallop Insurance Agency at 617-488-6541. (Source: Sallop Insurance Agency)

But what if a resident wanted to visit the same stylist they’ve been seeing for 30 years or even grab a sandwich at their favorite deli? In most cases, their options to do so were limited to scheduling a ride with the campus transport or asking a relative to drive them.

In many ways, the notion of loading a campus with lavish amenities, such as a movie theater and café, only further isolates the residents—solidifying the disconnect between seniors and their surrounding community. Although such an all-inclusive design will still be the right fit for many seniors, there is a growing demand for mixed-use, intergenerational housing that is built into the community. AARP’s 2011 Boomer Housing Study reports that 84% of those surveyed expressed a strong preference to stay in places and communities they have called home.2

“I think it’s one obvious trend of the future,” said Dodd Kattman, a partner in MKM Architecture + Design in Fort Wayne, Ind. “Recent statistics have illustrated that consumers’ preference of the traditional CCRC model has grown stagnant. In addition to existing all-inclusive campuses, providers should consider a pluralistic approach regarding housing style, location and alternative approaches to the delivery of services and care to these future residents. It’s headed in a new direction,” he said.

Kattman, whose firm has been at the forefront of this trend for several years, believes that it is here to stay. He explained that the model of building large, insulated sites can be traced back to a post-World War II romanticization of sprawling development and the subsequent rise of suburbia, but what’s changing this is an exceptional convergence of different generations’ views on living a connected life.

“We’re at this unique period of time where the walkable, connected lifestyle appeals to college kids, to young families and to retired people. People of all ages are looking for a place to live where they can walk to restaurants, stores, coffee shops, etc. That style appeals to people across the spectrum. We haven’t seen this conversion of choice in the United States since World War II.” (Continued on page 5)
Pursuing a model of connectivity is not a one-size-fits-all process. There are several different ways a developer can achieve a sense of civic inclusion, although three dominant themes have emerged:

- **Mixed Use**—Incorporating retail units, often on the first floor of a multistory building, not only allows residents to frequent independent businesses, but encourages outside citizens to visit.

- **Intergenerational**—This can take many forms, be it integrating market-rate residences with senior restricted IL apartments or incorporating a CCRC within a greater community using a connected design. Another approach is mixing senior housing with universities. The Kendal Corporation, a Quaker-inspired senior housing developer, has built several such communities near colleges and universities, including one at Cornell University in Ithaca, N.Y.

- **Walkability**—Location is essential for those facilities seeking enhanced connectivity. Facilities located near a vibrant community have an inherent marketing edge. The Mather South, for example, takes advantage of its downtown Evanston, Ill., location with walkable connections to urban amenities and the lakefront historic district.

Such developments are not without their challenges, however. Rob Vogt, a partner at real estate research firm Vogt Santer Insights in Columbus, Ohio, cites security, mixing populations and dealing with walk-in traffic as top concerns.

“If I had a mother in a high-rise, I would be concerned with how she would be evacuated in an emergency,” Vogt pointed out. “It’s also a challenge with how you mix residents. Often independent living residents don’t want to mix with memory care. How do you provide these levels of services, these variations?”

Despite these and other challenges, examples of mixed-use, intergenerational developments are popping up across the country, particularly in urban areas. One such example is Armstrong Place Senior Housing located in San Francisco’s Bayview District. Developed by nonprofit BRIDGE Housing, it offers apartments for low-income seniors along with market-rate units and local retailers on the ground floor. Its proximity to the city’s newest mass transit rail line links its residents to downtown, further enhancing its connectivity.

The Townhomes at Hendricks Place, a less urban example, benefits from a great location within the historic town of Lititz, Pa., recently named America’s “Coolest Small Town” by Budget Travel. Hendricks Place is part of Moravian Manor, a CCRC that offers the full spectrum of care. In the early 1970s, the Moravian Church donated 22 acres in town to build the initial retirement home. Over the years, ownership has made a conscious effort to expand its footprint seamlessly within the community. Instead of constructing a large campus and trying to recreate a small town feel within it, Moravian simply brought the CCRC to the small town.

“There’s just not a distinct separation between where our facilities start and stop,” said Moravian Manor CEO and President David Swartley. “You’ll see community members, school kids and seniors all using the same sidewalks and interacting. Community integration is essential for us.”

Recently constructed, The Townhomes at Hendricks Place offers its residents an interconnected sidewalk system that links to both the town and the personal care and health care facilities of Moravian Manor. Even seemingly minor steps are taken to ensure the facilities are integrated into the community, including minimizing signage associated with the CCRC buildings to better blend with the aesthetics of the neighborhood.

**Finding Financing**

When it comes to financing this new trend of senior living developments, there are as many questions as there are answers.

“The financing aspect is the great unknown,” Kattman said.

In today’s economic climate of low interest rates and limited traditional bank loans, often the preferred option for funding senior projects is to obtain financing through a U.S. Department of Housing and Urban Development (HUD)/Federal Housing Administration (FHA) program. There is an existing model in the market today for such a financing and plenty of lenders with ample experience executing it; however, this is not the case with mixed-use, intergenerational facilities. Financing can still be obtained, but things can get complicated. (Continued on page 6)
Kattman has seen many such deals get done with a grab bag of funding options. Different sources include tax credits, bonds, grants and various governmental set-asides. Securing financing for these developments encourages partnerships and nontraditional relationships because it often takes multiple organizations and a lot of creativity to complete the funding picture.

For the financing of Armstrong Place Senior Housing, BRIDGE Housing used several grants, including one from HUD/FHA's Sec. 202 program and one from the Federal Home Loan Bank’s Affordable Housing Program (AHP). When financing The Townhomes at Hendricks Place, ownership did not pursue HUD/FHA or any other type of permanent financing. Instead, it opted for a construction loan and included $1 million of its own equity. Moravian Manor, a tax-exempt organization with strong community support, financed its prior facilities with bank-qualified mortgages placed with two local banks.

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<th>Sources of Funds: Armstrong Place Senior Housing</th>
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<tr>
<td>HUD/FHA Sec. 202 Capital Advance</td>
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<td>California Department of Housing Community Development</td>
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<td>San Francisco Redevelopment Agency</td>
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<td>Enterprise Community Investment</td>
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<tr>
<td>Fed Home Loan Bank AHP</td>
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<tr>
<td>General Partner Equity</td>
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<td><strong>Total</strong></td>
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**Ways to Use HUD/FHA**

Incorporating construction or permanent HUD/FHA financing into these developments can be done, however. One could use the HUD/FHA Sec. 221(d)(4) or Sec. 223(f) program to finance the entire project if the units are market rate and IL only. Once the “licensed” line is crossed and AL and SNF units are introduced, things start to get complicated as there are additional restrictions with licensed care. In that case, one could finance a project under two separate loans—one under a MAP program, such as Sec. 221(d)(4) or Sec. 223(f), for the IL or market-rate portion and one under the LEAN program, such as Sec. 232 or Sec. 232/223(f), for the AL and SNF portion.

The Sec. 232 program generally allows for up to 25% of the units to be unlicensed IL. However, if the number of IL units proposed would exceed that 25% threshold, a financing solution through HUD would be simultaneously processing two loans. For example, when TDM Management was constructing Sugar Grove Senior Living in Plainfield, Ind., its plans called for both IL and AL. Its lender recommended using the Sec. 232 program for the AL units and the Sec. 221(d)(4) for the IL units. That strategy permitted more than 25% of the overall campus units to be IL. The lender authored, submitted and worked with HUD, so that the two loan applications would be processed simultaneously, permitting the bifurcated loan structure to close on the same day. In this case, both facilities were age restricted; however, this approach would work for an intergenerational facility where one loan financed an age-restricted portion (Sec. 232) and the other loan financed the market-rate portion (Sec. 221(d)(4)).

Another example of using HUD/FHA financing for a mixed-use development can be found in the condominium carve-out structure used by Tip Top Apartments in Omaha, Neb. The guidelines of the Sec. 223(f) program limit commercial space to 20% of net rentable area of a project and 30% of Tip Top’s space was occupied by commercial tenants. The solution was to carve out, or separate, the commercial area from the transaction and finance the residential units under a condominium regime. All the residential condominium units would then be under one mortgage with a covenant that the developer maintains them as rental units. (Continued on page 7)
The likelihood of HUD changing the requirements of its programs in the future to accommodate this trend is doubtful. The line that separates unlicensed units, such as IL or market rate, from licensed units, such as AL or SNF, is one that will likely remain solidly in place. This is not only because of the vast differences in managing IL versus AL or SNF, but also to ensure that should one aspect of the business falter the other can continue. As such, a common strategy is to have two separate ownership structures, each running a different aspect of the overall campus.

### Commercial Space and Income Limitations

<table>
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<tr>
<th>FHA Program</th>
<th>Allowable % of Total Net Rentable Area</th>
<th>Allowable % of Effective Gross Income</th>
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<tr>
<td>221(d)(3) &amp; (4) and 231</td>
<td>10%</td>
<td>15%</td>
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<tr>
<td>220</td>
<td>20%</td>
<td>30%</td>
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<tr>
<td>223(f)</td>
<td>20%</td>
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**Looking Beyond the Trend**

Whether financed with HUD/FHA, privately placed bonds, traditional bank loans or an assortment of tax credits and grants, developers are finding ways to successfully finance this new and growing trend. Although, at first glance, most might presume that mixed-use, intergenerational sites are best suited for dense urban areas, Kattman believes that the ideal fit is actually small to midsize communities.

“I think this trend is actually most fruitful to the small rural community with a population of 5,000 to 25,000—towns and cities that are struggling to keep their downtown areas active. The economic development benefits are even more important to these cities because they need that influx of capital and economic activity to revitalize their downtown.”

Kattman’s insight suggests that although we are learning plenty about this new trend in seniors housing, there likely remains plenty we do not know. And as the massive influx of baby boomers used to having a variety of options in their connected, intergenerational lives begin exploring retirement, one thing that appears certain is that the emphasis on connectivity is here to stay.


Member Spotlight: Eddie Gardner
Senior VP of Operations for CommCare Corporation

Growing up in Shreveport, Louisiana, Eddie Gardner spent a great deal of time at the nursing facility where his mother was the Director of Nursing. Each day as he walked to and from elementary school, his route included a stop at the facility. As a child, he could not have imagined he would devote his professional career to long term care; however, he has spent the past 27 years doing just that. For him, working in nursing facilities has been a rewarding profession, fostering caring environments and leading others to strive to continually improve care and quality of life for seniors and their loved ones.

Eddie attended Louisiana Tech University earning a B.S. in Business Management and in 1986 was given an opportunity to enter an administrator-in-training program with Louisiana based Magnolia Management. Within six months of passing the required course and test, he was named administrator of a 120-bed skilled nursing facility. After working for Magnolia Management for nine years and accepting three transfers and new facility assignments, Eddie took a position with Integrated Health Services, a national skilled nursing facility operator at a facility in Gonzales, Louisiana.

Over the next 14 years as administrator of Gonzales Healthcare Center, he helped the facility achieve five no-deficiency surveys. This cemented a reputation in the community as facility of choice for Gonzales Healthcare Center. Gonzales Healthcare Center always achieved key objectives. Eddie was promoted to oversee other company facilities as they transitioned corporate ownership to Nexion Health, Inc. As an Executive Director for the corporate region, Eddie helped foster other centers’ success.

In addition to attaining quality and corporate initiatives, Eddie has spent a great deal of time over the past 25 years working to advance initiatives in the profession as a whole. Among the Louisiana Nursing Home Association committees Eddie has served on are the Education Committee, Agency Liaison Committee, Spring Conference Committee, and Convention Committee. Service in state leadership positions, including as a Louisiana Nursing Home Association Board Member during this period, also provided valuable experience.

Eddie volunteered his facilities to implement several quality initiatives, including participation in a Continuous Quality Improvement Pilot, AHCA’s First Quality Program, Culture Change Initiatives and volunteering to pilot the QIS Survey. He has also ensured his centers’ participation in the My InnerView Satisfaction Surveys which serves as a quality improvement tool as well as a benchmark for quality.

In 2009, Eddie was approached by CommCare Corporation, a nonprofit healthcare group with 13 skilled nursing facilities to open their new flagship property, Old Jefferson Community Care Center in Baton Rouge. CommCare was looking for senior long term care leadership and within the year Eddie assumed the role of Regional Supervisor for six skilled nursing facilities. In 2011, Eddie was promoted to Vice President of Operations over long term care with responsibilities for 1,500 employees and 13 facilities. 2012 brought the elevation to Senior Vice President of Operations with the full direction of long term care for CommCare.

Among the professional accomplishments that he is most proud of are working with the teams at CommCare’s Centers and having these facilities achieve four and five star ratings from CMS, along with the advancement of culture change initiatives. Eddie’s goals are to continue to grow personally, professionally and improve the lives of the CommCare facilities’ residents through Culture Change and environment enhancement.

He lives in Baton Rouge Louisiana, has a wonderful wife, Lisa, and two boys, Greer (19, LSU student), and Graham (17, Senior at Catholic High of Baton Rouge, All-Metro Swimmer).

For more information on CommCare, visit their website at www.commcare.com.

For Eddie Gardner’s advice to new administrators, see page 9.

If you would like to nominate yourself or someone else for our Member Spotlight, email kmiller@lnha.org.
LNHA: With over 25 years of work experience in the long term care industry, I imagine you’ve seen it all! Do you have any career advice for new administrators?

Eddie Gardner: I have found long term care to be a great career, but it can have difficult and sometimes frustrating struggles that any tenured person in long term care can attest to. I have struggled myself with my career and only after caring for and losing both my ailing parents did I realize my calling and how to embrace being in long term care. It is truly a calling, not a job. So, as many with career advice say, search yourself, and choose a career you love and you’ll never go to work. Be dedicated, consistent, and fair with everyone; your employer, staff, residents, families, etc. and you will be successful. There are no “get rich quick easy” methods in long term care these days; it is a challenging, yet rewarding path.

LNHA would like to thank Eddie Gardner for his time and participation for this edition of Lagniappe’s Member Spotlight.