

## September 2011

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### AACM and You:

#### How we use the Accountable Partners Program

At Accountable Aging Care Management, we want to provide seniors and their families with guidance and resources so they can make smarter choices, the first time. Family dynamics and personal circumstances range broadly, so AACM works hard to stay up-to-date on a wide variety of resources available to seniors.

One of the ways we do this is through the Accountable Partners Program. We invite administrators from residential facilities, home health care, and personal assistance services to fill out a survey specific to the service they offer.

These surveys provide an opportunity for a company to give more detailed information about their service or facility than is normally available in a standard marketing brochure. If we have more than one company's Accountable Partner Survey on file when we give recommendations, this can help a client do a line-by-line comparison when making their final choice.

By having an Accountable Partner Survey on file for a company, we are able to better clarify differences and distinctions between companies, when making a referral.

We do not receive any kind of compensation when making a referral, nor do we guarantee referrals to any Accountable Partner. Our goal is always to provide the best information to the client.

If you are not yet an Accountable Partner, and would like to be (it's free), please go to our website now and [fill out a survey](#). To see a sample Accountable Partners Report, access a [Sample Profile](#).

### Changing Spaces

Here at Accountable Aging Care Management, we help elders and their families with a wide range of concerns. One of the most common questions families ask is "When is the right time to move into a residential care facility?" And this is quickly followed by "What type of facility would be the best fit?"

This can be a confusing and stressful time for both the elder and for their family, but it doesn't have to be. **With enough advance planning and forethought, "changing spaces" can actually be an enjoyable process for both the elder and their family.**

In fact, changing spaces *now* can make changing spaces *later*, much easier. Such was the case of one couple we knew. We'll call them Jack and Jill.

When Jack began to need help with his daily needs (dressing, bathing, etc), he and his wife, Jill, decided to move to an assisted living facility, where they could both be supported. With the extra help the facility provided, Jack and Jill could spend more time as husband and wife, and less as care recipient/caregiver. Sadly, after some time had passed, Jack became very ill and passed away.

Fortunately, for Jill, the facility where she lived was part of a larger community that also had independent living. Since she did not need help with her daily needs, she was able to move to the independent side, without having to change much of her lifestyle. She still had her same friends and could continue with her activities. For Jill, this made the grieving and transition process much easier, than if she and Jack had still been living in their own home.

**So not only is it important to choose the right time to move, but also the right kind of facility into which to move.**

In this issue, we will focus on this decision-making process. We have invited administrators from three different types of facilities to share their perspective on how families can best address these challenging questions. We hope this information will be useful, and that you will begin to consider these questions before it is too late.



## Page 2 – When is the right time?

Before discussing when the right time is to move to a facility, it may be helpful to first understand what kinds of facilities are available, and what services they offer for residents. The Educational Institute on Aging, a part of the Texas Association of Homes and Services for the Aging ([www.tahsa.org](http://www.tahsa.org)), has prepared an excellent summary of the Continuum of Care (Independent Living, Assisted Living, and Nursing). You can view this document [here](#).

In a nutshell, while Nursing Homes are primarily a “Medical Model” (i.e. the move-in requirements are primarily dictated by medical needs or doctor’s orders), Independent Living and Assisted Living, including Personal Care Homes and Dementia Care, are “Social Models” (i.e. move-in requirements typically dictated by social needs).

In the article below, we’ve invited administrators from three types of facilities to share their thoughts on the decision-making process. **Jil Utterback** is the Executive Director at [Morningside Ministries at The Meadows](#), an **Independent Living** facility in San Antonio. **Kathy Key** is the Community Relations Director at [Emeritus at the Medallion](#), an **Assisted Living** facility in Dallas. **Jennifer Scott** is the Administrator at [Collinfield House](#), a Personal Care Home in Austin, but writes from her perspective as an expert on **Alzheimer’s care**. Please note, we have condensed their responses below, but for more in-depth information, we encourage you to read the full article from each type of facility: [IL](#), [AL](#), or [Alz](#).

### When is the ideal time to move from living in one’s own home to living in a residential facility?

#### Independent Living:

- When depression or loneliness are interfering with living a day to day normal life.
- When fixing meals and housekeeping & yard work become difficult to manage.
- When someone loves to have fun and be social, and can participate in all the activities. Don’t wait too late!
- When your family member can make their own decision and be a participant in a move.
- When a move can be seen as an exciting adventure.

#### Assisted Living:

When we were children, our mothers knew how we were to progress through the first year until age 5. They had Dr. Spock’s book telling them what to expect. The aging older adult does not come with a manual. Every person, every individual is just that, individual and unique as far as a timeline goes. The ideal time to move from one’s home would be before a crisis has occurred and it becomes a necessity to make a move, rather than an anticipated event. I think the most important aspect of deciding when it is time is safety. For example: are they having frequent falls, forgetting medications, not eating properly, fearful of being alone and isolated, opening the door to strangers and not properly maintaining their environment?

#### Alzheimer’s Care:

There is no simple answer, as each caregiving situation is different. But when the caregiver simply can no longer provide the care, either because they are exhausted (most often the case) or the care needs have far outgrown what the caregiver can provide, it is usually time for placement. Often, a move occurs when there has been an emergency situation, such as a fall resulting in serious injury, an episode of aggression or ongoing combativeness with personal care, or an episode of becoming lost. A move at this time is too late and decisions are rushed. (Please see the full article, for a list of the twelve reasons to consider moving to an Alzheimer’s facility.)

### In choosing a facility, what are the three most important factors that a family should consider?

#### Independent Living:

- Does the “personality” of the community “fit” with my family member? The best way to judge this is to eat a meal and observe the surroundings. Do the residents look happy and are they interacting with one another? Is there a sense of respect and family atmosphere of caring between staff and residents?
- Is the organization time-tested and financially stable? Are resources allocated to assure a well maintained and updated facility?
- Is there a continuum with different levels of care for different needs as they arise? Ask how those needs can be accommodated. How much will that cost?

#### Assisted Living:

- Look at the amenities through the family member’s eyes and not yours. So often a perfect facility for Mom according to the daughter is not at all what would be comfortable to Mom.
- If Dad has beginning Alzheimer’s disease, is there a licensed unit so he can age in place versus having to find another facility later?
- You may also want to observe how the staff relates to her: welcoming, friendly and concerned? What is the family’s comfort level with the staff, as well?

#### Alzheimer’s Care:

- Is the community licensed and certified for dementia or Alzheimer’s? Certified communities have much higher staff education and in-service requirements, higher standards for activity programming, and are permitted additional safeguards against wandering.
- Sometimes it is better to drive a longer distance to receive the best care, than selecting a community that is closer.
- Many families look for a community where their loved one can remain until death. This should not be the deciding factor. The decision of where to place a loved one should focus on how well they will be taken care of every day and how well they will be engaged in their daily life.

### Once a person moves into a facility, what are some of the ways a family can help make this transition easier?



#### Independent Living:

- Let the new resident help decide where to put things—even if sitting in a chair in the center of all the boxes. Too often I have heard “my kids unpacked everything and I have no idea where anything is.” It is an extreme time of turmoil as is, but this can help!
- If the community has a Welcome Wagon type program where current residents help a new resident get acclimated, then step back and let it work! Let your family member “fly” on their own. If there is no such program, then go with them to a few meals and activities until a few new friends are established.
- Make the move fun! Bring the time treasured items, but suggest getting something new. Go shopping together and Enjoy!

#### Assisted Living:

The family can make a big impact by throwing a small party at the facility the week the “new” resident moves in. Invite some of their old neighbors or friends, so they can stay connected. While the family is responsible for moving in the furniture, it is very important that the family member help make decisions on which pieces they want to bring. It is so comforting to have those familiar pieces around. Favorite items from treasured collections, scrapbooks and picture albums are a must. These items not only keep everyone connected but also serve as an item with “bragging rights” as new friends are cultivated.

#### Alzheimer’s Care:

- Don’t visit too frequently at first. This can make it more difficult for the person to transition into the community and new routine. Frequent visits at first are also emotionally difficult for the caregiver.
- When visiting, leave the purse in the trunk of the car and put car keys in a pocket. Grabbing the purse and keys at the end of a visit is a big flag to the person that the caregiver is about to leave.
- Give hugs when you first arrive instead of when leaving. The less of a production at the time of exit the smoother the exit will be for both the caregiver and the person.
- Ask the staff to help with a diversion activity so the person is occupied when the caregiver leaves.

### In working with families who have waited too long to make a move, what do you see as the primary causes?

#### Independent Living:

- Not knowing the financial circumstance of their family member, and being afraid to ask.
- Fear of being the “bad guy” to siblings—not wanting to be seen as the one “forcing the move”
- Denial of the situation—a couple may compensate for each other, and as a whole seem to be doing ok, but one may be carrying too heavy a load and the adult child/person helping does not see true picture.
- Fear of the unknown...most communities offer a trial stay for a night or two...go with the person if possible and have a pajama party!
- The biggest is the fear of change—something we battle all our lives. Once settled, I’ve heard so many times over the years, “Why didn’t I do this sooner?”

#### Assisted Living:

The major cause I see is communication. It is not always easy to talk about important issues with an older adult, but these barriers have to be overcome for the safety of the family member involved. At the Assisted Living level, the family is probably already joining their loved one on doctor’s appointments and helping with transportation. The conversations have now changed in dynamic and must include more in-depth issues like money and care. I can’t stress enough how important communication is to the safety and wellbeing of older adults. Take the time, ahead of time, for proper planning, comfort and safety.

#### Alzheimer’s Care:

- Family doesn’t agree that placement is needed. This is common with siblings when the primary caregiver doesn’t have the support of those not managing the day-to-day care. No one truly knows the toll it takes on the caregiver unless they are the direct caregiver.
- Making promises the caregiver cannot keep, such as “I promised Mom I would never put her in a facility”.
- Caregiver is afraid their loved one will “never forgive them” or will be “angry with them”. It is fairly rare the person is able to think in “cause and effect”, so although they may be angry at first, this soon fades and the person doesn’t really know who to blame.

It has been my experience that making the transition is much more difficult on the caregiver than the actual person who is receiving the care. The caregiver thinks they are “giving up the care” and “failing” when in actuality they are still the primary caregiver and decision maker. The difference is the facility is doing the work instead of the family caregiver. A transition returns the family dynamics back to a family relationship instead of a “working” relationship. Many families have expressed this has been a blessing for them.

### AACM Educates

Mary Koffend is a regular [contributor](#) to Caring.com, and on September 6, she was featured in an educational webinar titled, "Help Choose Home: A Basic Primer on In-Home Care", sponsored by the Private Duty Homecare Association and Caring.com. If you missed the live session, you can still hear Mary's responses to the frequently asked questions about home care [here](#).

In the last edition, we mentioned [www.mmlearn.org](http://www.mmlearn.org) an educational resource offering online courses. We've partnered with mmlearn.org, and now have our own online video describing our services and explaining how care management can help families. The video is now live, and you can view it [here](#).

### AACM Gets Around

On Saturday, September 10, AACM participated in two eldercare events in Austin. Mary Koffend presented "Sources of Long-Term Care Financing" with Tyler Sutliff ([The Home Option](#)), at a breakout session at the 10<sup>th</sup> Annual Striking a Balance Caregiver Conference. Meanwhile, across town, Mick Koffend was an exhibitor for AACM's services at the Fall Conference and Annual Meeting of the Texas chapter of the National Academy of Elder Law Attorneys (NAELA).

In November, look for us at the National Association of Personal Financial Advisors (NAPFA) conference in Dallas.

### AACM Changes Faces

As we eagerly await the real arrival of the Texas Autumn (where is that rain?!), we have already felt the winds of change here in the AACM offices. Earlier this summer, we welcomed Jennifer Tobey as the new Coordinator for Bill-Paying Clients and Resources. Jennifer is also an accountant and has already improved the efficiency of our bill-paying system. We are excited to have Jennifer on our team! Then on September 1, we said good-bye to Cheryl Usry, Registered Dietician and another long-time member of our administrative staff. Cheryl is now working with Medifast as the nutritional oversight of their regional offices in Austin and San Antonio. We wish her the best of luck!

**Because referrals are the lifeblood of our business, the best way you can thank us, as a satisfied client, is by referring a friend, neighbor or colleague to us! We appreciate all your referrals.**

### Accountable Aging Care Management Team

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Visit us online: [www.accountableaging.com](http://www.accountableaging.com)

Accountable Aging Care Management is an eldercare consulting and care management firm.

Accountable Aging is a single source for seniors and their families to attain knowledge, resources and on-going assistance with the challenges related to aging or caring for an elder loved one. We serve seniors in Austin, Dallas, San Antonio and the surrounding areas.

With this newsletter, our aim is to provide a trusted conduit for eldercare information and resources and to highlight the services we offer that meet the needs of senior adults and their families.

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