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SPECIAL REPORT

Rebuilding with a Fresh Perspective: How to Use Lessons Learned During the Pandemic to Strengthen Your Senior Care Facility

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A Message from the President

The pandemic affected every industry, but its impact on the senior care industry was particularly devastating. The COVID-19 cases that swept through senior care facilities were highly publicized, eroding public trust in facilities and leading to a decline in census.

That's in addition to the challenges that senior care communities faced daily, from sourcing PPE to protecting staff and residents to working to establish physical distance in spaces that were originally designed to be communal and to promote socialization.

To say that the pandemic was challenging and trying would be an understatement, but senior care facilities persevered, implemented creative solutions, and have successfully navigated the pandemic thus far. In the process, we've learned important lessons and identified solutions to many of the obstacles that arrived.

Those lessons learned and innovation that was generated have value that will continue on far beyond the pandemic. Revisiting policies, revising marketing efforts and messages, and focusing on building those essential relationships with residents and their families may have been prompted by the pandemic, but they'll serve the industry well for years to come.

In this report, we're pleased to share some of those lessons learned. Not only are they important now, but they'll continue to be important as the industry rebuilds and moves forward, stronger for having endured this test.

Best Regards,



Matt Humphrey
President

Institute for the Advancement of Senior Care

iAdvance Senior Care

Memory Care Forum

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How to Forge Strong Relationships with Residents' Families

When your [senior care](#) facility engages with potential residents, you're also likely engaging with their families. Residents' families play an important role in helping them to choose the right facility, but your relationship with those families doesn't have to end there.

In fact, focusing on building strong, ongoing relationships with residents' families has many important benefits for everyone involved, and it isn't difficult to do.

Why It's Important to Develop Relationships with Families

Developing relationships with residents' families can help in multiple ways. Melissa Milanez, RN, executive director of Sunnyside Assisted Living in Sunnyside, Washington, explains that positive communication and relationships with residents' families are key to building trust.

Focusing on building strong, ongoing relationships with residents' families has many important benefits for everyone involved, and it isn't difficult to do.

"Our overall goal at Sunnyside Assisted Living is to provide the best life possible for our residents through connection, comfort, and [safety](#)," she says. "Maintaining a trusted partnership with our residents' families is an important part of that process. When everyone feels comfortable with the [quality of care](#) being given, we're able to work as a team to make sure that each resident's needs are properly being met."

The pandemic made maintaining that communication challenging and, in many cases, it required that facilities pivot how they communicated with families. Milanez explains that during the pandemic, Sunnyside Assisted Living largely communicated with families over the phone, through email, or through letters.

"Ensuring ongoing communication and trust during this time wasn't the same or easy, but we managed well and did the best we could. We are so grateful that the foundation of our relationships prior to the pandemic was built on trust, and so, transitioning from in-person communication to virtual for a period of time was received well and understood," she says.

Strategies to Successfully Build Relationships with Families

Transparency is essential in any relationship, and Milanez notes that transparency is the basis of the relationships she develops with residents' families. Milanez describes an "open door policy" that encourages families to freely voice concerns or complaints about any care their loved one receives. "We find that offering our families a platform to be heard opens a huge opportunity for building trusted relationships that are built on honesty and commitment to the resident we're serving," she explains.

Social media also provides a way to maintain that important transparency. By posting photos of residents participating in [activities](#) to the facility's Facebook page, families can see that their loved ones are participating and enjoying life.

In addition to social media, Milanez tries to email or call families weekly, too. She credits those extra efforts as being key to maintaining relationships, particularly during the pandemic.

Milanez encourages other senior care facilities to embrace that same transparency and to keep in touch with families regularly. "Approach the relationship from the standpoint of compassion and knowledge," she says. "The shared relationship we have with our families is that our ultimate goal is to maintain the physical and emotional [well-being](#) of our residents; that's also all our families want.

"By keeping open lines of communication, being honest, and sharing the joy that their loved one is experiencing under our roof, relationships naturally strengthen, and trust naturally grows."

"We find that offering our families a platform to be heard opens a huge opportunity for building trusted relationships that are built on honesty and commitment to the resident we're serving."

Melissa Milanez, RN, Sunnyside Assisted Living

Partnerships Can Help Facilities Prepare for a Demand Surge

The long-term care industry is facing increased demand that will more than triple in the coming three decades. According to the [Pan American Health Organization](#), the number of adults age 60 and over who need long-term care will more than triple from 8 million people to between 27 and 30 million people by 2050. Life expectancy continues to increase, but the number of people who have disabilities has also increased by 12.6% since 2009.

These factors amount to a significant increase in demand for long-term senior care, and the industry will need to be prepared to meet that demand. Nancy Losben, chief quality officer at Omnicare, shares her thoughts on the challenges the industry is facing and how we can best prepare for them.

With the rate at which the U.S. population is aging, what does this mean for aging populations today and in the future? Can you describe the importance of today's Assisted Living Programs?

NL: As Americans live longer and the numbers of persons with [dementia](#) climb, our assisted living communities are being compelled to meet the market's needs for increased levels of [care](#) and additional services, such as incontinence care, [memory care](#), and medication administration. Pharmaceuticals and new age treatments will promote the participation of pharmacies and pharmacists to manage unique medication delivery systems and collaboration in patient [safety](#) programs to support aging in place.

With that said, not only will the aging U.S. population continue to rise dramatically, but a large portion of the individuals in need of this crucial care will not be able to afford it. Today's seniors are active and have diverse needs, and organizations are innovating daily with programs, services, products, and resources that help people better care for their health proactively, so they can keep costs down and conveniently access the care they need before it becomes critical.

“As Americans live longer and the numbers of persons with dementia climb, our assisted living communities are being compelled to meet the market's needs for increased levels of care.”

Nancy Losben, Omnicare

However, with the rate at which the U.S. population is aging, many resources will struggle to handle the number of citizens who are expected to require 24/7 hands-on care in the coming

decades. There is a future for skilled nursing facilities and assisted living facilities that have the capability to plan for the future, and the time to start planning is now.

What steps should senior living facilities take today to ensure they're prepared for the increased need that we'll see in the coming years?

NL: As an industry, we need to work together to rebuild trust in the eyes of consumers and address some of the challenges [facilities](#) are facing, from [staffing](#) shortages to decreased revenue and low bed counts. Forming and strengthening partnerships is a great way to take some of the burden off facility staff by outsourcing things like pharmacy services, food services, cleaning, and other tasks. Working with third-party partners ensures things are being done with a certain level of expertise and frees employees up to focus on patient care.

What types of systems do you feel are most beneficial for senior care facilities to start implementing? What are the best types of investments they should be making?

NL: Implementing systems that can speed up or streamline operations are always beneficial investments for facilities. Specifically, investing in automation is a great way to save time and money. When it comes to pharmacy services, for example, smart [technologies](#) that streamline ordering or dispensing can enhance patients' overall [well-being](#), keep facilities in compliance with regulations at every level, and create a more comprehensive approach to medication management.

“Implementing systems that can speed up or streamline operations are always beneficial investments for facilities.”

Nancy Losben, Omnicare

Staffing is an ongoing challenge in the health industry — do you have any tips to help facilities streamline their operations and make the most of the staff they already have? Should they be creating a long-term staffing plan to help prepare them for increased demand?

NL: Unfortunately, there is no one-size-fits-all solution that will magically help every facility, but to meaningfully address staffing challenges, it takes a combination of efforts. Long term staffing plans are certainly worth considering, but ultimately freeing up staff from administrative tasks and introducing operational efficiencies that allow them to spend more time with patients is in everyone's best interest — the facilities', the staff, and the patients.

[As an example, from a pharmaceutical perspective], bringing additional geriatric clinical expertise and knowledge, and lending support within facilities where support is needed, clinical consultant pharmacists [may be] able to ease the burden on facility staff while helping to increase efficiencies and streamline operations.

What to Look for When Choosing a Staffing Agency for Your Senior Care Facility

The nursing shortage means that staffing is a constant concern for most senior care facilities. According to the [American Nurses Association](#), more than 100,000 registered nurse job openings become available each year. By 2022, there will be more registered nurse job vacancies than there will be vacancies within any other profession.

Additionally, more than 500,000 registered nurses are projected to retire by 2022, meaning that the nursing shortage is likely to get worse.

As a result, [senior care](#) facilities need to find effective ways to staff shifts, and staffing agencies can help. But to get the best results out of working with any staffing agency, a senior care facility needs to carefully screen it to make sure it's the best fit.

How Staffing Agencies Can Help

Staffing agencies can help senior care facilities to ensure they have the staff they need, but facilities benefit from increased staff in other ways, too. Tony Braswell, CEO of Gale Healthcare Solutions, explains that trying to make do with insufficient staff can lead to issues like higher worker's comp claims, increased staff burnout, and more potential patient injuries.

"When you have people work a proper number of hours, that changes everything," says Braswell. "It can lower stress, reduce staff absences, and actually cut costs if you're not having to constantly offer bonuses and boosted rates to get your own staff to cover extra shifts."

"When you have people work a proper number of hours, that changes everything."

Tony Braswell, Gale Healthcare Solutions

For many facilities, working with staffing agencies in itself can be a change. "I think a lot of facilities have done things the same way for 30 years," says Braswell. "But today, they've got options they never had before. For example, companies with on demand apps can add an unfilled shift and see it filled in seconds."

Braswell suggests that if a facility is considering working with a staffing agency, then the following tips can help ensure that they find an agency that's a good match.

Know What You're Looking For

Before approaching a staffing agency, it's beneficial for a facility to take some time and determine what type and amount of staffing they need. "Maybe [a facility needs] per diem staff for weekend, or maybe it's a travel nurse to cover a short-term vacancy, or maybe what they really need is for us to help them find a permanent employee," Braswell says. When a facility has already determined its budget, its staffing needs, and the shifts it needs covered, that makes it easier for a [staffing](#) agency to determine how to best help that facility.

It's also important for a facility to share the skill set that its staff need to have. "If most of your needs are for nurses, and the agency mostly has nursing assistants, that's not going to help. It's very important that an agency have staff that meets a facility's needs," says Braswell.

"It's very important that an agency have staff that meets a facility's needs."

Tony Braswell, Gale Healthcare Solutions

Be Prepared to Ask the Right Questions

When interviewing a staffing agency, be prepared with a list of questions. Braswell suggests that facilities ask each agency if they can provide credentials for their staff on demand. Particularly, can that agency provide those credentials during off-hours and on weekends when that information might be urgently needed, or will a facility have to wait until weekday business hours? "If a state official walks in your building, having easy access to staff credentials can help you address concerns quickly," said Braswell.

Asking about the agency's staffing numbers can also help to identify which agencies could be the most helpful to a senior care facility. An agency with more people on staff may be better able to help a facility looking to fill larger staffing needs. That help may also come sooner when an agency has more staff to be able to contact.

It's also important to ask about how [clinical](#) performance issues are addressed, says Braswell, as well as what kind of a pay rate a staffing agency offers staff. "You don't want to see agencies paying outside of the market rate, because not only will it cost you more, but it can make your staffing situation worse. Your own facility staff may want to quit and go to work for the agency, instead," he explains. He notes that same-day pay can be a big motivator for staff to accept an extra shift.

Braswell recommends asking the additional following questions:

- How soon can you help us with our staffing needs?
- What are your on-call hours?
- If there's a problem, how can I reach someone?

- What type of continuity of care can I expect, and will I be able to get the same nurses often?
- How experienced are your staff, and do you require any skills and knowledge testing prior to hiring?

Solving the Staffing Problem

In light of the nursing shortage, staffing agencies can help senior care facilities to ensure that their shifts are covered and their residents can receive the [quality care](#) they need. “We’re losing more nurses than we’re gaining,” says Braswell. “We can’t quickly train all the nurses this country needs overnight. But we can make it a lot easier for facilities to send out an alert of their staffing needs, and for nurses to get that alert quickly. When you scale that approach, you’ll start to see a lot more shifts getting covered.

“We can’t quickly train all the nurses this country needs overnight. But we can make it a lot easier for facilities to send out an alert of their staffing needs, and for nurses to get that alert quickly.”

Tony Braswell, Gale Healthcare Solutions

“Staffing companies aren’t here to be adversarial. Our job is to get you to a place where you don’t need us. We can help your facility secure adequate staff, so you can better retain your employees, and have the time to hire the additional permanent staff you need. I want to come to work one day to find that no one needs me. For all of us who’ve had loved ones in a healthcare facility, and known the consequences of understaffing, that would be a wonderful thing.”

How One Senior Living Community Makes Staff Retention a Priority

For senior living communities, staff retention is an ongoing priority. Not only does the current nursing shortage make attracting and retaining talented staff essential, but staff are the lifeblood of [senior care](#) facilities. Innovative staff retention facilities are more important than ever, and one community has demonstrated the value that comes with that innovative thinking.

Pandemic Benefits That Solved Real Problems

Management at Goodwin House, Inc., which has locations in Alexandria and Bailey's Crossroads, Virginia, quickly realized that they needed to find unique ways to support staff during the pandemic.

"We recognized how difficult it was to obtain anything at the grocery store, and how uncomfortable it was initially to go to the grocery store," explains Fran Casey, chief people officer at Goodwin House, Inc. "We were doing all that we could to keep residents and staff as safe as possible, and we determined that if we could provide items on site, that would reduce the need to go to the store. It would help our staff find difficult-to-find items, and it would allow us to provide these items at cost."

In response, Goodwin House created an onsite grocery store, saving staff trips and helping them to access the items that were frequently out of stock in stores. Staff paid between nothing to the at-cost price for these items.

As the pandemic evolved, Goodwin House pivoted to offer staff grocery gift cards. "So many people were adversely affected by [COVID-19](#)," says Casey. People lost jobs, or lived with spouses who lost jobs. "We provided gift cards to anyone in need."

Unique Staff Benefits That Make a Real Difference

In addition to the unique COVID-19 staff support, Goodwin House supports staff in other ways. "Like many organizations, we provide a very competitive rich benefit package that includes life insurance, dental insurance, disability, and healthcare," says Casey. "Some of the other things that we do are a bit unique, like our citizen assistance."

Currently, the nearly 900 staff at Goodwin House represent over 65 countries, but the cost of applying for U.S. citizenship is often a barrier to staff submitting an application. The Goodwin

Innovative staff retention facilities are more important than ever, and one community has demonstrated the value that comes with that innovative thinking.

House Foundation was founded in 1989, and its citizenship assistance program began in 2018. Through that program, the foundation provides employees with grants to help cover the cost of the citizenship application fee. Eighty-nine employees have received citizenship application support from the Goodwin House Foundation so far.

Goodwin House also offers a tuition assistance program, but takes a non-traditional approach in paying upfront and not predicating the assistance on grades. “In our opinion, a grade doesn’t necessary reflect intelligence,” explains Casey, “especially if someone’s coming from another country where English isn’t the first language.” She notes that the tuition assistance is a widely-used benefit among staff. “It benefits us, it builds investment in the organization, and it allows people to grow.” To date, 89 employees have received tuition assistance, with \$250,000 in tuition assistance being provided to staff over the last two years, alone.

Staff also enjoy a very generous 401(k). “For many of our staff, we know this is their primary investment for their future,” says Casey. “In difficult times, we haven’t pulled back on our contributions at all, and we match dollar-for-dollar up to 4%. We also offer an employer discretionary contribution that began in 1999. Even in the most turbulent times, including during the pandemic, we were able to continue to provide that.”

Goodwin House also offers an emergency loan program. Staff in need can access interest-free loans that they can pay back over the course of a year.

Positive Results

This employee-centric approach has brought real results. Casey notes that Goodwin House regularly receives messages of gratitude from staff. Goodwin House was ranked as one of the top 10 organizations in The Washington Post 2021 Top Workplaces in the Washington, D.C. area ranking. This award is based on employee feedback.

Goodwin House continues to look for ways to improve its staff offerings. Staff feedback received in the community’s engagement survey helps identify what elements are most important to address. “We look to our staff to tell us what’s needed,” says Casey. “We do a lot of communication and involvement of staff in the decision-making process. When you take feedback, share information in both good and more troubling times, I think that goes a long way.”

“We do a lot of communication and involvement of staff in the decision-making process. When you take feedback, share information in both good and more troubling times, I think that goes a long way.”

Fran Casey, Goodwin House, Inc.

As far as future initiatives go, Goodwin House is currently working on a living wage initiative. Under the initiative, no staff member will earn less than \$18 per hour, and no clinical staff member will earn less than \$20 per hour, by 2023.

The Key to Staff Retention: Listen

Casey recommends that facilities looking to improve their staff retention focus on really listening to staff. “Don’t assume you know what’s most valued, needed, or wanted. Ask the questions and then follow through.”

Even more importantly, if your facility isn’t able to do something, it’s essential to share the why. “Listen, follow through on your promises, and overcommunicate,” Casey recommends.

“Don’t assume you know what’s most valued, needed, or wanted. Ask the questions and then follow through.”

Fran Casey, Goodwin House, Inc.

Ensure Follow Up for Your Senior Care Facility Marketing Leads

Effective marketing is an essential aspect of ensuring that [senior care](#) community vacancies are filled, particularly after the erosion in public trust prompted by [COVID-19](#).

Your community may already have a marketing funnel established and in place, but if your marketing leads aren't getting the proper follow-up, you could be missing out on opportunities and wasting your marketing dollars.

The marketing lead follow-up is one of the most important elements of your marketing funnel, but it's also often misunderstood and overlooked. If you want to improve your marketing and lead conversion, then you might want to focus on your follow-ups.

Why Follow-Ups Matter

Amy Osmond Cook, Ph.D., founder of Osmond Marketing and CMO of Simplus, explains that follow-ups are critical marketing elements. "Proper follow-up allows the business to build a relationship with the potential customer, leading to stronger connections and higher patient enrollment," she says.

Allison Wert, Marketing Manager at SmartBug Media, notes that the importance of follow-ups is backed by research. "Research shows that the time between a lead being submitted and sales follow-up has a direct impact on conversions, so prompt follow-up from qualified leads is critical! In addition, teams can leverage automation to send follow-ups that keep prospects engaged and informed about the next steps, making a great first impression."

"Proper follow-up allows the business to build a relationship with the potential customer, leading to stronger connections and higher patient enrollment."

Amy Osmond Cook, Ph.D., Osmond Marketing

Designing the Ideal Follow-Up Process

The ideal follow-up process will depend on your marketing funnel, but Wert highlights the importance of implementing follow-ups at all stages of your funnel. It's also important to keep the content relevant and targeted to the stage of the funnel, so prospects stay engaged.

According to Cook, "the golden rule is to follow up with leads within seven minutes. The sooner a follow-up takes place, the higher the probability of turning that lead into a customer."

There are multiple ways you could potentially perform follow-ups, and these might vary based on your marketing and sales teams and your marketing funnel. Cook notes that when possible, it's best to perform follow-ups by phone. "Real human interaction establishes a stronger connection with the lead, as the conversation is often more personalized and meaningful over the phone versus email correspondence."

If a lead reaches out via live chat message or social media DM, Cook says it's best to answer their questions and obtain their contact information. Then, follow up by phone within 24 hours of that initial correspondence and verify that all questions were answered.

According to Wert, leads who are ready to talk to a sales person should receive a follow-up from the sales team. "Marketing can supplement this with an automated acknowledgment of the form submission and additional resources. For leads that are not sales-ready (MQLs), marketing can really shine and warm up leads through nurturing and useful resources until they are sales ready."

You may wish to appoint staff to focus solely on follow-ups and contacting leads. If you choose this method, Cook notes that it's important that these individuals have strong communication skills and be familiar with your business' protocols.

Keys to Creating Effective Follow-Ups

It's essential to carefully design your follow-ups so that they're effective. "An effective follow-up should add value to the conversation and the patient's journey," says Cook. "Each time you follow up with a lead, think of what you can bring to the conversation. This could be key information that would aid them in their decision process, the contact information of an individual who could assist them, or content that would resonate with them and their experiences."

"An effective follow-up should add value to the conversation and the patient's journey."

Amy Osmond Cook, Ph.D., Osmond Marketing

Wert explains that it's important for marketing and sales to be aligned on lead stages and definitions, who's responsible for follow-ups, and how those are documented in the [CRM](#). Ensuring that staff within both departments are on the same page can help those staff to perform appropriate handoffs, making for a smooth and appropriate lead progression through your sales funnel.

How to Implement a Follow-Up Process

If your facility hasn't previously implemented a formal follow-up process, you could be missing out on valuable leads. Cook explains that it's helpful to appoint an individual to be in charge of managing and creating the follow-up process. She says that many healthcare facilities hire marketing professionals to provide in-house [training](#) to staff, while some outsource their follow-up process by hiring a marketing company to perform the follow-ups for them. This arrangement leaves facilities with more time to focus on delivering quality resident [care](#), rather than focusing on marketing.

If your facility hasn't previously implemented a formal follow-up process, you could be missing out on valuable leads.

Strategies for Improved Staff Communications

Strong staff communication is essential to a senior living community's success, but ensuring that communication is timely and effective can be challenging. The pandemic created additional communication obstacles, especially when situations were rapidly changing and timely updates were necessary.

Leandra Negrete, vice president of operations at Kisco Senior Living, shares how the organization invested in communication before the pandemic and found new communication solutions during the pandemic.

Cross-Community Communication

Kisco Senior Living is based in Carlsbad, California, but the operation owns 20 senior living communities throughout six states. That complexity added a challenge to reaching all staff at all locations across all shifts. Negrete shares that Kisco works to communicate with employees in a number of ways.

Kisco management teams host a "Daily Line Up" meeting every morning. All associates attend the meeting, where they learn important information about the day, residents, events, and more. "This is a meeting where everyone has a voice, can ask questions, and can make requests. We end it by reciting our principles, values, and beliefs as a reminder of what matters most in our culture," explains Negrete. All Kisco communities host these meetings seven days per week. The home office also hosts a weekly meeting, virtually connecting more than 65 remote- and home-based corporate staff.

The home office also hosts monthly virtual meetings with service groups, like the dining, [care](#), and [wellness](#) groups. These meetings allow peer groups to share best practices, provide training, and stay connected with other managers companywide.

Meetings allow peer groups to share best practices, provide training, and stay connected with other managers companywide.

The pandemic prompted increased communication and some alterations to the existing communication practices. The Daily Line Up continued, but was held in larger rooms to allow for increased spacing between staff. "But, we didn't pause this important outlet to infuse culture and critical updates to start each day," says Negrete.

"We moved monthly department support calls to a weekly cadence to help managers feel connected and supported with ever-changing [COVID](#) protocols, and to share rapidly developing

best practices to serve our residents in new ways,” she notes. “To ensure we reached all associates regularly, we sent weekly messages through our Human Resource Information System (HRIS), which enabled us to reach all associates companywide via their mobile app.

“This proved to be one of the more important vehicles for communication, as it was a quick and comprehensive way to keep our staff informed, and updated, and to share much-needed words of praise and encouragement throughout the pandemic.”

Kisco adheres to the mantra, “7 different ways, 7 different times,” an important reminder of the need for repetition and multiple sources to ensure effective communication. The effectiveness of that approach was reflected in a recent associate survey; Kisco received higher scores on its companywide communication and overall support related to the pandemic than ever received previously.

Trust Through Transparency — and Technology

Technology — primarily Kisco’s existing HRIS system, Dayforce — allowed for faster and easier communication during the pandemic. “We leveraged this tool more than ever as the best way to reach every single person in the organization,” Negrete explains.

“We were able to send messages and videos from our CEO and other communities, in addition to COVID status and protocol updates. We have always built trust through transparency, and our associates felt safe and informed throughout the pandemic because we maintained a constant feed of communication through email, video conference calls, and HRIS mobile app messages.”

Communication Trainings

In addition to quality communication practices and technology, Kisco also offers **trainings** to help its associates communicate more effectively. “Communication norms and trainings are tailored based on a subject from recruitment to consultative sales to crisis management and effective performance conversations,” says Negrete. While communication skills are important, Negrete notes that Kisco focuses on sustaining its culture through its principles, values, and beliefs. Many of those elements focus on how communication takes place, with an emphasis on open communication, being professional, honesty, and more.

How Great Communication Fundamentals Play a Role in the Pandemic

Having effective communication practices in place made it easier for Kisco to transition to the increased communication demands of the pandemic. “We certainly responded differently than other senior living providers during the pandemic,” notes Negrete.

Having effective communication practices in place made it easier for Kisco to transition to the increased communication demands of the pandemic.

"If we had a COVID case, our staff and residents would be informed within a couple of hours from receiving the positive test result. Executive directors would write letters to share with our families, and we would even post the letter to our website and social media outlets. We didn't delay bad news. We felt an obligation to keep our community informed of COVID status updates, what was being done, and protocol recommendations.

"While we may have leveraged technology more, from using video conferencing to conducting virtual tours to sending mobile messages, I feel that our communication over the last year solidified what we've always valued and feel our residents, associates, and families deserve — honest, timely, and open communication."

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Leandra Negrete, Kisco Senior Living

Top Ways to Ensure a Smooth Transition for New Residents

A new resident's transition into your [senior care](#) facility is a key time. A smooth transition can reduce resident stress, make a positive first impression, and help a resident to immediately feel a part of the community.

But these transition periods are tricky, and ensuring that they go smoothly can be a challenge. If you want to improve your residents' experience from the very beginning, it may be time to reexamine how you're handling transitions.

Transition periods are tricky, and ensuring that they go smoothly can be a challenge.

Why Transitions are Challenging

Marcy Baskin, eldercare consultant and managing director at Senior Care Authority, explains that there are many challenges to transitions, and those challenges can show up differently depending on the circumstances that surround the resident's move. "The experience depends on physical, emotional, and cognitive abilities of the person who is moving," says Baskin.

"If a person is moving because, for example, they just lost their spouse, the impact of leaving their home of many years is compounded by their grief and sadness," Baskin explains. "Care needs that make living alone unsustainable have psychological impact and may leave the older adult feeling vulnerable and dependent."

Baskin notes that the transition can feel foreign and institutional to residents. "Even something as simple as learning their way around the new community or deciding where to sit in the dining room (not unlike being the new kid in the high school cafeteria) can be unsettling," she says.

New residents may also experience challenges around:

- Smaller living quarters requiring them to leave possessions behind
- Eating in a group dining setting or being very particular about food
- Not knowing anyone, especially for residents who are naturally introverted
- Feeling out of control, such as when someone comes by to dispense medications, rather than being in charge of one's own medications
- Anxiety surrounding change

- Learning new routines
- Pet issues

Senior care facilities can help to make the transition easier in multiple ways.

How to Prepare for a Smooth Transition

Thorough preparation can play a significant role in making transitions smoother for new residents, and much of this preparation starts while the resident is still at home. Baskin notes that efficient packing and preparation for the move is important, and residents and their families also need to spend time thinking about what to do with possessions that residents can't take with them.

Other preparation steps, like setting up the cable and phone ahead of time, and making sure that mail is forwarded, can help residents to settle in.

Baskin also recommends that it's often beneficial to work with a professional advisor. That advisor can ensure that the new environment "checks all the important boxes for the person who is moving." Baskin adds that most of these work at no cost to the person moving, as communities pay them a fee when they introduce a new resident professional.

Best Practices in Creating a Smooth Transition

Certain best practices can help senior care facilities to ensure that residents experience as smooth a transition as possible. Baskin notes that some of her favorite senior care communities share a common feature: "They have a welcoming committee, a buddy system for new residents, a resident ambassador, or some other system in place for integrating a new resident," she says.

"Having something like this in place can greatly reduce the anxiety of living in this new and unfamiliar environment. Feeling welcome and accepted play a huge role in the comfort level of new residents."

Baskin also encourages communities to do some research into a resident before they move in. Find out what they enjoy, what their life was like in the decades before their move, and who their closest friends and family members are.

It's also important to ensure that new residents are reminded of the community's daily scheduled activities. "If you notice someone is not attending any of the offerings, have your activity director make it a point to knock on their door and personally invite them," suggests Baskin.

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Marcy Baskin, Senior Care Authority

Ensuring that staff are aware of the new resident is also essential. “One pitfall I have seen is that because staff are very busy, they may not stop to greet or do a real check in,” says Baskin. “Thirty seconds of “Good morning Mrs. Smith — you look lovely today, how are things going? Are you enjoying the food?” can go a long way to making someone feel less invisible and welcomed.”

Baskin also encourages communities to hold daily check-ins with caregivers, med techs, activity directors, dining room staff, and other personnel. These check-ins should take place during a resident’s first week or two within the community. The check-ins can help the community to troubleshoot for [isolation](#), loneliness, boredom, or any other dissatisfaction. She also urges communities to track the new resident’s satisfaction on all levels. “Food, in particular, can be a comfort if enjoyable and a problem if it isn’t.”

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The initial transition into a senior care community can be challenging for residents, but communities can take many steps to help make that transition easier. With preparation and extra effort to make the resident feel welcome, communities can help new residents to connect and engage with staff, other residents, and the [activities](#) available.