The Key Concepts of Residential Aged Care Management

A Conference for Managers in the Aged Care Industry

On Tour in New Zealand
3rd - 13th April 2017
The Key Concepts of Residential Aged Care Management

A Conference for Managers in the Aged Care Industry

VENUE: Aboard the Celebrity Solstice Cruise Ship
LOCATION: Sydney to the South Island of New Zealand
DATE: 3rd to the 13th of April 2017

An opportunity to gain key industry insights, enhance your industry knowledge, boost your decision making confidence, network and establish industry contacts, network and establish industry friendships.

Being a Manager in Residential Aged Care in Australia can be one of the most rewarding managerial roles. Conversely it can also be one of the hardest that you could sign up for. The expectation of Managers is huge. These expectations come from the clients, their families, the broader community, various government departments, your staff, your staff’s families, various industrial bodies, your Board, your line Manager, and most importantly the expectations that you place upon yourself.

You will be required to have a full understanding of the various pieces of legislation that provide the framework for services to be delivered in this sector. You are also required to manage a large number of staff who come from very different professional backgrounds; but who all need to work together as a team to ensure quality service delivery. And you do all of this whilst balancing a budget where operational income and costs can alter from week to week depending on resident acuity.

This conference aims to provide you with the knowledge you need to cover the key concepts of Aged Care Management. We also aim to provide you the opportunity to meet other Aged Care Managers and thus create yourself a network of colleagues that will form the basis of your ongoing professional support network.

This conference has been designed for Managers in Aged Care irrespective of your role - whether you are the Chief Executive Officer of the organisation or the Care Manager – you will benefit from the content that is being offered.

What's included:

- Ten nights aboard the Celebrity Solstice with a range of accommodation options
- Drinks and canapés evenings on day one and day ten of the cruise
- Networking sessions each evening to create the industry friendships and relationships that you can draw on to seek advice and brainstorm ideas.
- A conference program delivered by recognised experts in the field – Pam Bridges from Pam Bridges Consulting and President of NIMAC, Julie McStay Director Hynes Legal, and James Grealy Chief Executive Officer Tierra Health.
- Optional Tours:
  - Dunedin – including a visit to a Residential Aged Care Facility and discussion of facility design and the impact on service delivery.
  - Akaroa
  - Wellington – including a visit to a Residential Aged Care Facility and discussion regarding facility design and the impact on resident happiness
  - Picton
### The Program

#### 3rd April 2017: Day One – Depart from Sydney

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<tr>
<th>Time</th>
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<tr>
<td>1800 - 1900</td>
<td>After boarding our vessel and settling into our rooms, we commence our conference with a welcome reception and registration session in the Sky Observation Lounge as our ship departs from Sydney.</td>
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#### 4th April 2017: Day Two – At Sea

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<tr>
<th>Time</th>
<th>Presenter</th>
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<tr>
<td>0850</td>
<td>Sue Walker</td>
<td>Conference Opening&lt;br&gt;Sky Conference Centre</td>
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<tr>
<td>0900 - 1000</td>
<td>James Grealy</td>
<td>Value Driven Leadership&lt;br&gt;It’s all about leadership – management is the easy bit!&lt;br&gt;During this session James will explore creating high performing teams and how to structure structuring your team for success. The use of psychometric testing will be discussed and how to use it to manage key staff and drive success will be investigated.&lt;br&gt;This session includes a number of real life anecdotes and includes:&lt;br&gt;• Setting KPIs&lt;br&gt;• Cascading KPIs in line management&lt;br&gt;• How much salary to put at risk for that bonus&lt;br&gt;• Incentivising and KPIs for wage earners (non-salaried personnel)</td>
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<tr>
<td>1000 - 1100</td>
<td>Julie McStay</td>
<td>Co-design: Novel Options for Delivering Residential Aged Care in Different Built Environments&lt;br&gt;The distinction remains between independent living and residential aged care in Australia. Providers are increasingly looking for ways to offer residential level aged care services in different built environments, including independent living units.&lt;br&gt;This session will consider various novel options for the delivery of high level subsidised residential aged care services in different environments that can still comply with the complex regulatory regimes that exist at State and Federal levels.&lt;br&gt;This session will cover:&lt;br&gt;• What are the legal issues at the interface between independent living, community care and residential care?&lt;br&gt;• How could a mixed care approach work in practice?&lt;br&gt;• Could an approved provider be eligible to receive government subsidies for residential care that is provided outside of a traditional RACF?&lt;br&gt;• This presentation will explore whether a truly mixed-use aged care complex can become a reality in Australia.</td>
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### Day Two Continued

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<th>Time</th>
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<tr>
<td>1100 - 1200</td>
<td>James Grealy</td>
<td>Operational Levers</td>
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<td>James takes a very practical approach to managing the residential aged care business of delivering quality care and services and maintaining strong financial returns whilst managing risk. 'Staying grounded' is an important part of the approach. In this session James will discuss the practical manoeuvring of select operational levers to get a stable financial performance and quality service outcome. The Operational Levers sessions work through the main recurrent income and expenditure lines and building the RAD book.</td>
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| 1200 – 1400 |                          | Break                                              |

| 1400 – 1600 | James Grealy               | RAD book. RADs, DAPs and Supported Ratios          |
|             |                            | In this two hour workshop James will explore:     |
|             |                            |   • Building the Balance Sheet - the RAD book      |
|             |                            |   • RAD versus DAP and managing the combination    |
|             |                            |   • Pre-admission (the sale), admission and the immediate post-admission period - key points to manage |
|             |                            | Discussion will focus on the key elements of the sale, RADs, DAPs and supported resident ratios, and use of respite (is it really worthwhile?). Additional Services (Not Extra Services) What's in; what's out will also be explored. Including - How do you cost these services? Do you provide them as single choice items or a package for the user to buy? |

| 1800 – 1900 | Cellarmaster Lounge        | Network Session                                    |

**5th April 2017: Day Three – At Sea**

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<th>Time</th>
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<tr>
<td>0850</td>
<td>Cheryl Dezotti</td>
<td>Conference Opening</td>
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<td>Sky Conference Centre</td>
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| 0900 – 1000 | Pam Bridges               | Complaints Management                              |
|             |                            | In this session Pam will discuss the key components of Complaints Management using the regulatory requirements as the framework of the discussion. These include:     |
|             |                            |   • Elder Abuse                                     |
|             |                            |   • Compulsory Reporting                            |
|             |                            |   • The missing Resident                            |
|             |                            |   • Harassment and Bullying and other EH&S issues  |
|             |                            |   • Insurance implications                         |
### End of Life Decisions, Impaired Capacity and Consumer Directed Care: Applying the Law About Decision Making in a Home Care Context

This is a practical session for providers with respect to end of life decision making and making health care decisions on behalf of adults with impaired capacity in the context of CDC and the delivery of care in the home.

The session will be focused on assisting aged care clinical staff better understand obligations as they relate to decision making for clients/residents with impaired decision making capacity and end of life decisions.

The session will cover matters such as:

- How to determine (and who should make a determination) that a client has impaired capacity.
- How health care decisions can properly be made on behalf of an adult with impaired capacity.
- How end of life decisions can be made on behalf of an adult with impaired capacity.
- What is an advance health directive and how is it different from an advance care plan?
- What sort of behaviours should trigger alarm bells in decision making and how should providers manage that behaviour?
- How to apply the requirements in a home care context.

### Admission of a Client

Really the only thing that Aged Care Providers have control over is who they offer a place to.

In this session Pam will explore:

- Resident Agreements
- Getting to know Families
- Explaining Facility Staffing
- Complaint processes
- Security of Tenure
- End of Life Care

### Compliance Issues Post Acquisition: How to Achieve a Smooth Transition of a New Facility or Facilities to Your Portfolio and Minimise Compliance Risk

One of the most challenging aspects of any acquisition merger is ensuring that there is a smooth transaction after the transaction has settled. This may mean you need to transition across to your own systems or adapt some of the existing systems to meet your own or perhaps even learn to live with the existing systems of the facility you have acquired.

For any provider, the period immediately post acquisition can be fraught with compliance risk.

This session will cover:

- Greatest regulatory compliance risks post acquisition
- Systems recommendations to achieve a smooth transition post acquisition
- How to minimise compliance risk post acquisition
**Day Three Continued**

1500 – 1600  
**Presenter:** Pam Bridges  
**Staffing**

Various staffing models have been trialled within the aged care industry. The suitability of same has a direct correlation to Resident happiness, quality of service delivery, as well as service reputation if you get it wrong.

In this session Pam will explore staffing in relation to:
- Scope of Practice
- Clinical Structure
- Quality of Care
- Links with Specialist Services

1800 – 1900  
**Cellarmaster Lounge**  
**Networking Session**

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**6th April 2017: Day Four – Milford Sound, Doubtful Sound & Dusky Sound**

**Milford Sound**

As we sail into the narrow fjords of the Milford Sound, even your massive ship seems to shrink in comparison to the towering cliffs topped by lush mountain terrain. Situated within Fiordland National Park, this natural wonder is part of the Te Wahipounamu World Heritage Site and is protected by its natural geography, which makes it a haven for all types of wildlife.

Visitors to Milford Sound will not be disappointed. It is truly spectacular, with scenery that has remained unchanged throughout the ages.
Day Four Continued – Milford Sound, Doubtful Sound & Dusky Sound

Doubtful Sound

As cold mountain water cascades from the cliffs above Doubtful Sound, it creates an unusual phenomenon-a dual-layered marine ecosystem of fresh and saltwater. This serves as a playground for a number of species, including fur seals and two types of penguins - the fiordland crested and the blue penguin.

Dusky Sound

Steep cliffs that have been carved over centuries by dozens of waterfalls surround the largest and most complex of the many fjords along the New Zealand coast, Dusky Sound. It's also a wildlife paradise, with seals and dolphins patrolling the water, and birds like broad billed prions, mottled petrels and sooty shearwaters floating on the overhead thermals.

1800 – 1900 Cellarmaster Lounge Networking Session: Panel Q&A Session

Panel: Cheryl Dezotti, James Grealy, Julie McStay, Pam Bridges.
Facilitator: Sue Walker

Question and Answer session – Questions to be submitted by 1800 hrs on the 5th of April.
Optional Tour of Dunedin

In this optional tour, you will explore the beautiful scenery of Dunedin. Both the scenery and the architecture borrow heavily from Scotland. Our tour will include a visit to a Residential Aged Care Facility and discussion of facility architectural design and the impact on service delivery.

For those not attending the optional tour, you have the day to explore at your own leisure the scenic town. One of Dunedin’s claims to fame is being home to New Zealand’s only castle which only took 15 years to complete!

8th April 2017: Day Six – Akaroa & Christchurch

Nestled in the heart of an ancient volcano, Akaroa is rich with beautiful bays, French and English colonial history, even the largest little penguin colony on the mainland.

It's also home to the rarest and smallest marine dolphin and lots of water sports-kayaking, sailboats, also hiking paths and cycle tours. Pick up a unique souvenir from one of the many local craft shops and boutiques.
Optional Tour of Christchurch

This tour will focus on Emergency Management, as we see how Christchurch has rebuilt itself after the earthquake devastation. We will also be visiting a local Aged Care Facility.

9th April 2017: Day Seven – Wellington

Optional Tour of Wellington

On this tour we will explore what the city has to offer including a visit to a Residential Aged Care Facility and discussion on facility design and the impact on Resident happiness.

For those of you not attending the tour, you have the day to experience New Zealand’s capital in all its glory.
Optional Tour of Picton

The picturesque seaside town of Picton is the South Island base for the ferry service that links the main islands of New Zealand. It’s also the gateway to the marine, forest and island attractions of the Marlborough Sounds. Built around a very sheltered harbour, the town has an attractive seafront dotted with cafés, restaurants and various types of galleries.

10th April 2017:

1800 - 1900
Cellarmaster Lounge Networking Session

11th April 2017: Day Nine – At Sea

0850
Presenter: Sue Walker
Conference Opening
Sky Conference Centre

0900 – 1000
Presenter: James Grealy
Recurrent Funding and Recurrent Costs

This session looks at Rules of Thumb in budgeting to achieve quality outcomes and strong EBITDA.

The conversation will cover the main income streams and rules of thumbs of allocating them against expenditure lines.

Depending on your business model costs will vary e.g. front of house reception as a passive cost / value add, food and catering costs, cleaning costs and cleaning programs.

A wide sweeping overview of cost drivers will be discussed for you to reflect upon.
### Managing Social Media

**Presenter:** Pam Bridges

Social media has become central to the way in which people communicate on a daily basis. The way in which staff interact with social media and discuss their lives including their work can impact on the reputation of the facility as well as the privacy and confidentiality of both staff and Residents.

In this session Pam will discuss:
- Essential Policies
- Staff education
- Management processes
- Disciplinary procedures

### Quality and Aged Care: Has Accreditation Delivered a Service that Reflects the Wants and Needs of the Older Person

**Presenter:** Cheryl Dezotti

Quality care and services has been a central tenant in the professional career of Cheryl Dezotti.

From the completion of her master’s degree in quality in health care to working with the Accreditation Agency and her appointment as an Administrator and Nurse Advisor on the Department of Health and Ageing’s panels to support sanctioned facilities Cheryl has seen it all!

In this session Cheryl will explore the use of the accreditation process as a driver for continuous improvement in residential aged care.

### Hypothetical Case Study

**Presenter:** Julie McStay

This case study is based on a recent coronial decisions in residential aged care. It will provide practical advice for providers to minimise the risk of finding themselves in similar situations and covers the following issues in the context of how they would be examined by a coroner:

- Staffing levels and ratios
- Quality of Care
- Policies and Procedures
- Staff Training
- Substitute decision making
- Medication Management
- Record Keeping
- Allied Health Services
### 12th April 2017: Day Ten – At Sea

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<td>0900 – 1000</td>
<td>Pam Bridges</td>
<td>ACFI&lt;br&gt;The ACFI instrument is used to gauge client acuity and fund services to meet the care requirements of that individual. In this session Pam will explore:&lt;li&gt;The importance of ACFI funding&lt;/li&gt;&lt;li&gt;Monitoring ACFI claims&lt;/li&gt;&lt;li&gt;Managing the ACFI Validation visit&lt;/li&gt;&lt;li&gt;Cost effectiveness of resourcing Complex Health Services e.g. 12.4B claims&lt;/li&gt;</td>
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<td>1000 – 1100</td>
<td>Julie McStay</td>
<td>Incident Management: Coronial Matters and Managing Major Clinical Incidents: Risk Taking by Residents&lt;br&gt;In the event of a reportable death in aged care, an approved provider may be required to give information as part of a coronial investigation. If the matter proceeds to a coronial inquest, the provider may be named as an interested party. Navigating a coronial investigation or inquest brings unique challenges which must be approached in a thoughtful way to avoid legal or reputational risks.&lt;br&gt;The session would cover matters such as:&lt;li&gt;How to determine (and who should make a determination) that a client has impaired capacity.&lt;/li&gt;&lt;li&gt;How health care decisions can properly be made on behalf of an adult with impaired capacity.&lt;/li&gt;&lt;li&gt;How end of life decisions can be made on behalf of an adult with impaired capacity.&lt;/li&gt;&lt;li&gt;What is an advance health directive and how is it different from an advance care plan?&lt;/li&gt;&lt;li&gt;What sort of behaviours should trigger alarm bells in decision making and how should providers manage that behaviour?&lt;/li&gt;&lt;li&gt;How to apply the requirements in a home care context.&lt;/li&gt;</td>
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<tr>
<td>1100 – 1200</td>
<td>Sue Walker</td>
<td>Residential Aged Care: The Last Great Institution of our Time&lt;br&gt;Is it sustainable and should it continue?&lt;br&gt;Residential Aged Care is the last great community institution. Psychiatry, developmental disability, and physical disability services have all been decentralised and are provided in smaller community based home style services but the institution of aged care remains.&lt;br&gt;Is this a reflection of rampant ageism or simply the best way to deliver service?&lt;br&gt;Will the next generation of clients be happy to live in an institution? Will residential aged care providers find themselves in a situation where they are unable to fill vacant beds and indeed will they be lumbered with buildings that they have no use for?&lt;br&gt;In this session Sue will explore the latest “thinking” on where residential aged care could be heading?</td>
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1200 - 1400 Break

1400 – 1500 Presenter: James Grealy

Staffing Models and Workforce Management

Modelling rosters using hours per resident per day (prpd), staff to resident ratio, full time employee numbers, and $ prpd

Depending on your model of care and resident acuity the staffing mix will vary, so what are some of the Rules of Thumb to not over or under staff.

James will discuss:
- workforce management: getting the right balance between permanent and casual staff numbers;
- managing leave liabilities,
- creating flat management structure;
- discussion on workforce model for person centred care

1500 – 1600 Presenter: Pam Bridges

Twenty Year of Accreditation

Pam has a wealth of knowledge and experience in residential aged care accreditation. In this session Pam will explore:
- How expected outcomes link
- Triggers for “not met”
- Risk management
- Managing the Accreditation visit
- It is a continual process

1800 - 1900 Venue: Sky Observation Lounge

Conference Reception and Farewell Session

Complementary Drinks and Canapés

13th April 2017: Day Eleven - Back in Sydney Safe Travels
Presenters & Tour Leaders

Presenters

James Grealy

James Grealy is a highly regarded aged care executive with extensive experience in restructuring services, and building and leading high performing teams.

From 2011 to 2015, James was Chief Operating Officer and then Chief Executive Officer at Aquarius Aged Care (formerly BCP Health & Aged Care). Prior to this, he worked for more than six years on dementia sensitive design, quality programs and operational modelling. He was also an executive with one of the largest leading Christian aged care providers in Australia where he managed Quality, Risk and Capital, and was responsible for the development of a new person-centred model of care.

James has conducted a number of industry-based research programs, including ‘Resistance to Care as a Cause of Staff Injury in Dementia Care’ funded by WorkCover SA Inc. 2005. He was the dementia expert on the DoHA-funded Dementia Curriculum Stocktake 2007, and dementia expert for Oral Health Program for Residential Care (2011) and Oral Health Community Care (2014). He is also a board member of Aman, NSW Lebanese Muslim Association aged care.

Known as a transformational leader, James has a proven record for delivering optimal outcomes in quality of care and service, risk management and financial performance. He also likes dogs and fine Italian leather goods.

Julie McStay

Julie McStay is a Director and leader of the aged care and retirement living group at Hynes Legal.

Julie is a specialist in the industry and advises a large range of aged care providers and retirement living operators including publically listed groups, private groups and not for profits. Julie has an intimate understanding of the legal issues critical to the aged care and retirement living sector.

Julie was recently selected by her peers for inclusion, for the fifth consecutive year, in the ‘Best Lawyers International list’ as a leading lawyer in Australia in ‘Retirement Villages and Senior Living Law’.

Julie provides advice to operators on acquisitions and sales, major incident management, coronial matters and all regulatory issues. She regularly provides advice to LASA Queensland about regulatory matters relevant to both aged care and retirement living.

Julie is a member of the Queensland Law Society Elder Law Committee and she has a Masters of Law with a major in health law. She is also a graduate of the Australian Institute of Company Directors.
Pam Bridges is a Registered Nurse BA (Social Welfare), Graduate Diploma (Health Services Management) and an Aged Care Quality Assessor. She has been involved with a wide range of State and National Committees and Reference Groups representing industry views and interests on behalf of the ACQ (LASA Q) membership. Pam is also included on the Department of Health and Ageing Nursing Advisor and Administrator Panel.

Pam's wide ranging career experiences have enabled her to network with members across the state and across all streams i.e. retirement living, community and residential.

In her spare time Pam has been President (an honorary position) of Nurses in Management Aged Care (NIMAC) for the past eighteen years. This is a professional development, peer support association and network for those working in the aged care sector in management positions. She hosts a very successful annual conference each year, and has led study tours to the Netherlands and Singapore (2011), and Philadelphia and Los Angeles in the USA (2012), Ireland and the UK (2014) and most recently Sweden and Denmark (2016). These tours are an opportunity to compare the provision of aged care in a number of countries other than Australia.

**Tour Leaders**

Cheryl Dezotti is a Registered Nurse and holds a Masters Degree in Quality in Healthcare. Cheryl has worked in both the acute and aged care sectors as a clinician and extensively in healthcare education and management.

Cheryl is co-founder and Director of the Nurses for Nurses Network.

She has extensive experience in the application of Quality methodologies to meet the accreditation criteria created by government agencies in the acute and aged care sectors.

In her role as Assistant Director of Nursing & Quality Manager of a medium sized private acute hospital, Cheryl was central in the application of the EQUIP criteria required for accreditation by the ACHS and led the facility in the implementation of medical clinical indicators which was a central part of the accreditation process. The Hospitals Quality Program was recognised by the Australian Private Hospitals Association via a national award for Quality and Excellence.

She has been appointed Clinical Advisor and Administrator for aged care organisations that have been sanctioned, along with being an Aged Care Accreditation Assessor and working as an Executive Manager and Facility Manager of Aged Care Facilities.

This experience has allowed her to explore the healthcare accreditation processes from both sides of the divide and she is happy to share her views as to whether the process of accreditation leads to enhancing the experience of the service provided to the patient/client/resident.
Jason Dawson is a Registered Nurse from the Gold Coast Queensland. Whilst studying his bachelor of Nursing at Southern Cross University he developed an interest in mental health and has been working in this field of nursing since completing his studies in 2008.

In this time, Jason has undertaken varied roles including Acute Inpatient Nursing, Community Nursing, clinical facilitating and Nurse Unit Manager positions. In 2012, Jason combined his passion for nursing with his love of travel and founded CPD Cruise Pty Ltd with the view to providing Nurses the opportunity to update and improve their skills in diverse and unique locations.

Sue Walker is co-founder and Director of the Nurses for Nurses Network. Sue is passionate about making a difference to the way in which people experience the healthcare system. Healthcare should be delivered by competent, knowledgeable individuals to ensure the best possible experience for the recipient of that care. Nursing is a fabulous profession - the backbone of the healthcare system, in co-founding the Nurses for Nurses Network her aim is to provide a platform for her nursing colleagues to enhance their knowledge and share their specialist skills with other nurses.

Sue has worked in a number of clinical practice areas her most recent clinical experience being in the aged care sector as both a clinician and a manager.

During the time she worked as a Nurse Consultant for Health Services Evolution, the aim was to provide an education and quality monitoring system that was useful and relevant to those that work in the aged care industry. “We measure financial performance but rarely take the time to review the care indicators that reflect the core business of the industry.”

Sue continues to believe that the use of quantifiable clinical care indicators, monitored by an independent external agency, in the aged care industry would lead to a much better service delivery model.

* Education expenses may be claimable as a tax deduction inclusive of airfares and accommodation, please see your tax accountant for individual advice.

**We strongly recommend customers take out travel insurance at the time of registration for an event, to cover any unforeseen circumstances that may prevent them attending and thus incur any financial loss.**

Disclaimer: The opinions and statements of facts expressed by the Presenters in these proceedings are those of the Presenters and do not necessarily represent those of the Nurses for Nurses Network, the editors, the organising committee or the supporters of this conference. No responsibility can be accepted by the Conference organisers for errors or omissions in the individual presentations. Sessions are correct at time of publication. Sessions are subject to change without notice due to circumstances beyond the control of the Conference organisers.