

**(Recent) SYLLABUS: HAP 650**  
**Assisted Living/Senior Housing**  
**Management & Operations**  
**Spring '07**

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**Texts:**

*Required:*

1. Pearce, Benjamin; *Senior Living Communities – Operations Management and Marketing for Assisted Living, et al...Communities*, 1<sup>st</sup> Edition. The Johns Hopkins University Press.
2. Namazi, Kevan, and Chafetz, Paul; *Assisted Living – Current Issues in Facility Management and Resident Care*, Auburn House Publishers.
3. Carle, Andrew; *Moments, Memories, and Mission – Stories from the Field of Assisted Living*, George Mason Intellectual Properties.

*Recommended:*

Moore, Jim; *Assisted Living Strategies for Changing Markets*, Westridge Publishing.

Richardson, Larry; *How To Market Your Assisted Living Facility*, Senior Market Research Associates.

**NEW:** McSweeney-Feld, Mary Helen (Editor); *NAB Residential Care/Assisted Living Exam Study Guide*, 2<sup>nd</sup> Edition. National Association of Boards of Examiners of Long Term Care Administrators

**Course Description:**

This course provides an introduction to the assisted living/senior housing industry, current issues affecting the industry, and instruction in both the administration and practice of managing an assisted living or related senior housing community. Specific instruction will include management of day-to-day operations, including administration, resident care, hospitality and ancillary services - and their relationship to the concepts of choice, dignity, and individuality as provided to residents within the assisted living/senior housing environment. As an adjunct to class instruction, guest speakers representing key industry providers and organizations will be presented. To further real world exposure, students will complete independent research of a nationally ranked senior housing provider, as well as field study analysis of an individual assisted living/senior housing community. Finally, future trends and innovative approaches will be reviewed to prepare students for active contribution to the next generation of assisted living/senior housing services.

## Course Objectives:

As the most rapidly growing industry for seniors seeking housing, the objective of this course is to prepare students for entry into, or advancement within, the senior housing profession. This objective recognizes that quality services are best achieved through effective and knowledgeable leadership, innovation, and a strong ethical and philosophical understanding of consumer needs at the community level. Upon completion of this course students will be able to:

1. Understand the growing demographic of the senior housing and care industry and demand, both current and future, for assisted living/senior housing services.
2. Understand and define the different types of senior housing available to consumers.
3. Understand national and state level political, regulatory and licensure environments surrounding the assisted living/senior housing industry.
4. Articulate and practice the core concepts of assisted living/senior housing relative to “Aging in Place”, choice, dignity, and individuality.
5. Understand and apply management techniques to the administration, budgeting, and marketing of an assisted living/senior housing community.
6. Understand and apply management techniques to the provision of resident care, including Alzheimer’s Care, within an assisted living/senior housing community.
7. Understand and apply management techniques to the provision of hospitality services within an assisted living/senior housing community.
8. Discuss and understand the provision of ancillary healthcare and/or contract purchased services within an assisted living/senior housing community.
9. Identify, discuss, and/or develop unique and innovative approaches to the provision of assisted living/senior housing services.

## Instructor Expectations:

As indicated above, real world exposure to assisted living/senior housing communities, residents, and professional staff will play an integral part of the instruction. Therefore students should be able to attend class and participate in off-campus assignments as determined. 15% of the course grade will be held for class participation, with advanced completion of all readings and assignments necessary for this purpose. A Mid-term examination consisting of multiple choice and short essay answers on covered topics will comprise 30% of the course grade. During the semester, each student will research and present in-class information relative to a top-ranked industry provider, such presentation to be valued at 15% of the course grade. Each student will also be assigned a Final Research Paper, which will require him/her to visit, research, and submit findings on a specific assisted living/senior housing community in the Washington Metropolitan Area. Final papers are valued at 40% of the course grade, are due on the day assigned, with discussion of drafts available by the Instructor 5 days in advance of the due date.

## Summary Grading Criteria:

Class Participation	15%
Provider Review	15%
Mid-Term Exam	30%
Final Paper – Community Review	40%

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## Course Outline:

(Web readings can be accessed from this document via “Ctrl” + clicking on the link)

Week One: 1/24 *Topic:* Course Overview/Industry Overview, Philosophy of Assisted Living  
*Video:* “A Community of Care. All the Comforts of Home.”

*Read:* Pearce Chapter 1 (pgs.3-9); Namazi Chapters 1 & 11

*Web:* “U.S. Aging Population”

<http://www.census.gov/population/www/pop-profile/elderpop.html>

*Web:* “World Aging Population”

[http://orsted.nap.edu/openbook.php?record\\_id=10120&page=31](http://orsted.nap.edu/openbook.php?record_id=10120&page=31)

(2 pgs. Click “Printable PDF Page” link for best image)

## **SECTION I: ADMINISTRATION AND OPERATIONS**

Week Two: 1/31 *Topic:* Regulations, Licensing and Accreditation

*Read:* Handout: “Assisted Living Regulations: A State By State Profile”

*Web:* “Standards and Regulations for Licensed Assisted Living Facilities – Virginia Dept. of Social Services

<http://leg1.state.va.us/000/reg/TOC22040.HTM#C0071>

(Chapter 71, Sections 10-700)

*Web:* “10 Common Myths About Surveyors”

<http://www.providermagazine.com/pdf/caregiving-05-2005.pdf>

*Web:* Auxiliary Grant Reimbursement in Virginia

<http://content.hamptonroads.com/story.cfm?story=117596&ran=11380>

*Guest Speaker:* Maribeth Bersani, Senior VP

Director of Public Policy, Assisted Living Federation of America

Week Three: 2/7 *Topic:* Operations, Budgeting, Finance

*Read:* Pearce Chapter 2 (Pgs. 19-28), App.-B: Ops Audit (review);  
Namazi Chapter 12;

Handouts (Moore): “The Income Statement”, “Expense Reduction”,  
“How to do Tiered Pricing in Assisted Living”

*Web:* 2006 Largest Providers

<http://www.alfa.org/files/public/2006LargestProviders.pdf>

(Assign: “Top Provider” Presentations)

Week Four: 2/14 *Topic:* Resident Relations

*Read:* Pearce Chapter 5 (Pgs. 79-94 ½);  
Handouts: “Assisted Living Admission Agreements –  
Provisions Essential To Sound Management”

*Web:* “Virginia Rights and Responsibilities of Residents of Assisted Living”

<http://www.dss.virginia.gov/form/pdf/032-05-021.pdf>

*Web:* “My World Now”

<http://homepages.moeller.org/pastmin/service/sunrise/myworldnow.htm>

(Begin “Top Provider” Presentations)

Week Five: 2/21 *Topic:* Human Resources – Employee Relations, Staffing/Recruitment

*Read:* Pearce Chapter 3 (Pgs. 35-58); Namazi Chapter 5;  
Handouts: “ALFA – Best Practices In Employee Retention”, “Turning  
The Tables On Turnover”,

*Web:* “Taking The Pulse Of Employees”

<http://www.providermagazine.com/pdf/human-02-2004.pdf>

Week Six: *Topic:* Marketing – Sales, Referral Development, Community Relations  
2/28 *Read:* Pearce Chapter 14 (Pgs. 230-255)  
*Web:* “The Assisted Living Marketing Test”:  
<http://www.providermagazine.com/pdf/mgmt-08-2003.pdf>  
*Web:* “Student Mystery Shops Identify Issues”:  
<http://chhs.gmu.edu/hap/assisted-living-press/mysteryshops.pdf>

Week Seven: *Topic:* Marketing – Move-in Coordination, Guest Relations  
3/7 *Read:* Pearce Chapter 15. Handout: “The Anatomy of a Move-in”.

### **MID-TERM EXAMINATION (All Topics To Date)**

Week Eight: **SPRING BREAK - NO CLASS**  
3/14

## **SECTION II: RESIDENT CARE SERVICES**

Week Nine: *Topic:* Levels of Care, Staffing, Case Management  
3/21 *Read:* Pearce Chapter 17, Chapter 4 (Pgs. 77-78); Namazi Chapters 2-3

Week Ten: *Topic:* Medications Management, Risk Management  
3/28 *Read:* Pearce Chpts. 5 (Pgs. 94 ½ -101), 3 (Pgs. 58 ¾ -66); Namazi Chpt. 10;  
Handouts: Packet #1: “Legal Minefields/Risk Management/Will Your Documentation Defend You in Court?/Reducing Resident Falls”;  
Packet #2: “Negotiated Risk: Background Information/Sample Disclaimer Agreement/Sample Arbitration Agreement”  
*Web:* “The ‘Poisonous Cocktail’ of Multiple Drugs”  
[http://www.nytimes.com/2007/09/18/health/18brod.html?\\_r=1&oref=slogin](http://www.nytimes.com/2007/09/18/health/18brod.html?_r=1&oref=slogin)

Week Eleven: *Topic:* Alzheimer’s/Dementia Care  
4/4 *Read:* Namazi Chapters 7&8. Handout: “A Daughter’s Odyssey, a Home for Dad”.  
*Web:* “Alzheimer’s Patients Respond To Cognitive Techniques”  
<http://providermagazine.com/pdf/cover-12-2005.pdf>  
*Web:* “Lost & Found”  
<http://www.aarp.org/bulletin/longterm/Articles/alzheimer.html>

**Guest Speaker:** Terry Klaassen, Founder, Chief Cultural Officer  
Sunrise Senior Living

## **SECTION III: HOSPITALITY SERVICES**

Week Twelve: *Topic:* Activities, Transportation, Concierge/Front Desk  
4/11 *Read:* Pearce Chapters 4 (Pgs. 69-76), 6-7; Handout: “Form and Function.”  
*Web:* Sample Resident Newsletter: (Click Jan. 2006 Issue)  
<http://www.goodwillhome.org/FamilyNewsletter.htm>  
*Web:* “Nintendo Wii bowling over U.S. Retirees” (article and video)  
<http://www.msnbc.msn.com/id/17753137/>

**Guest Speaker:** David Kylo, Executive Director  
National Center for Assisted Living  
(Assign Community Review)

Week Thirteen: *Topic:* Dining/Food & Beverage

4/18            *Read:* Pearce Chapters 8-9. Handout: "Making or Breaking the Dining Experience".

Week Fourteen: *Topic:* Environmental Services/Maintenance/Disaster Plans

4/25            *Read:* Pearce Chapters 10,11,12

*Web:* "Emergency Preparedness"

<http://www.providermagazine.com/pdf/cover-01-2005.pdf>

*Web:* "Five Steps To Preventive Maintenance"

[http://www.nursinghomesmagazine.com/Past\\_Issues.htm?ID=1206](http://www.nursinghomesmagazine.com/Past_Issues.htm?ID=1206)

Week Fifteen: *Topic:* Innovations and the Future of Senior Housing

5/2

*Read:* Handouts: "Redefining the Business of Assisted Living";

*Web:* "University Based Retirement Communities"

[http://www.nursinghomesmagazine.com/Past\\_Issues.htm?ID=5608](http://www.nursinghomesmagazine.com/Past_Issues.htm?ID=5608)

*Web:* "Providers Bring Technology To The Table"

<http://www.providermagazine.com/pdf/cover-03-2005.pdf>

*Web:* NPR Radio: "Home For Seniors"

<http://www.npr.org/templates/story/story.php?storyId=5443317>

*Guest Speaker:* Rebecca Schritchfield, Manager

Center for Aging Services Technology (CAST)

## **SECTION IV: ADDENDUM**

Week Sixteen: *Topic:* Course Review (all topics to date)

5/9

**FINAL PAPER DUE:** Community Review Results

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**Academic Accommodations:** If you are a student with a disability and require academic accommodations, please see me AND contact the GMU Disability Resource Center (DRC) at 703-993-2474. All academic accommodations must be arranged through the DRC.

### **Honor Code:**

The George Mason University Academic Honor System applies to all work done for this course. If you have not done so (recently), read the Honor Code that is included in the University Catalog. The below link will take you to the GMU Honor System and Code:

<http://www.gmu.edu/catalog/9798/honorcod>