



EXECUTIVE SUMMARY
Resident and Family Expectations Management
White Paper | August 2023

EXECUTIVE SUMMARY of White Paper:

RESIDENT AND FAMILY EXPECTATIONS MANAGEMENT IN SENIOR LIVING

Implementation and Impact of the
Guide Path Resident and Family Insights Survey®
on Risk Mitigation and Quality of Life



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Executive Summary

The White Paper explores the challenges and complexities faced by the senior living ecosystem, most notably clinical and operational risks and regulatory compliance. It offers a solution to manage resident and family expectations as a key driver to reducing losses and improving quality of life as part of a "cultural evolution" in senior living.

The White Paper introduces Guide Path and the Resident and Family Insights Survey and Suite of resources, a revolutionary program focused on understanding and responding to resident and family expectations. It advocates a paradigm shift from traditional quality management to a more socially inclined and culturally competent approach that involves all stakeholders, particularly residents and their families.

Introduction

The senior living ecosystem faces complex challenges and aims to deliver comprehensive, person-centered care while managing risks and promoting autonomy. Claims and losses impact quality of life for residents, families, and staff. In this paper, we highlight the complexity of senior living care and present a shared vision to provide comprehensive, person-centered care while managing risks, reducing losses, and promoting the senior living "cultural evolution."

The Evolution of the Senior Consumer and the Role of the Family

As the baby-boomer generation enters senior living, expectations for personalized care and services have increased. Understanding and addressing the expectations and needs of families is crucial for building trusting relationships between residents, families, and senior living communities.

The Guide Path Approach

Guide Path, created in 2021, is an Expectations Management and Process Improvement Certification Program designed to mitigate risk, improve quality of life, and solve staffing issues along the continuum of care. The program includes the Resident and Family Insights (RFI) Survey, which plays a key role in identifying and managing risks arising from unrealistic expectations about transitions to senior living. Our approach empowers communities to engage residents and families, identify risks from expectations, and enhance quality of life while reducing losses and grievances.



The Guide Path Approach - *continued*

Step 1: Sources of Expectations and Risk

The Guide Path Resident and Family Insights (RFI) Survey provides insights into resident and family needs during transitions of care, crucial for risk mitigation and resident-centered care planning. The survey consists of 25 questions in five high-risk "Areas of Interest" related to family needs and expectations during transitions of care. These areas include communication, the family system, goals of care, the aging process, and emotional and spiritual health.

Step 2: The Resident and Family Insights Risk Rating

The RFI Survey responses are scored for potential risks in each Area of Interest. Aggregate risk ratings enable communities to focus on high-risk areas and implement proactive interventions, enhancing communication and overall quality of care.

Step 3: Resident/Family Engagement and Risk Mitigation

Empowered with risk ratings, communities have access to resources and action plans to address areas of significant risk with residents and families. The RFI Survey Suite includes interventions and solutions to foster trust and understanding between residents, families, and communities focused on high-risk areas.

Validation from the RFI Survey Pilot

Surveys were administered on-site as part of the admission process or sent via email to the resident's family/other identified recipient using a HIPAA-compliant Guide Path Community Portal to create, print, send, and monitor the completion of surveys.

Findings from a three-month pilot study with six senior living communities highlighted the potential for risk mitigation and substantial loss reduction, particularly in two of the five Areas of Interest.

The Areas of Interest with the highest risk potential (defined by an overall risk score of medium or high) were The Aging Process, followed by Emotional and Spiritual Health. In every survey, respondents had at least one potential risk area, based on individual question responses, even if the total risk for the Area of Interest scored low risk overall. Questions related to clinical prognosis (under The Aging Process) and fulfilling the resident's spiritual needs (under Emotional and Spiritual Health) were most likely to trigger a high-risk response.

A case study exemplifies the value of the RFI Survey in improving resident and family engagement and mitigating risks.



Validation from the RFI Survey Pilot - *continued*

At the pilot's conclusion, participants were asked to complete a survey to assess the RFI Survey Suite for overall ease, efficiency, and usefulness. Results indicated that participants had a high level of satisfaction overall, with an average score of 4.5 on a 5-point scale. Equally important, pilot partners felt the RFI Survey asked relevant questions that accurately reflected the community's perceptions of risk for their residents.

Conclusion and Key Takeaways

The Guide Path RFI Survey Suite addresses the multiple challenges stakeholders face in the senior living ecosystem. Setting and managing realistic expectations with residents and families fosters trust and transparency, leading to improved quality of life and reduced complaints, grievances, and risks. The program supports the reduction of adverse consequences, empowers staff, and promotes growth and change in the ecosystem.

The Guide Path RFI Survey Suite revolutionizes risk management through proactive interventions and strategies to set realistic resident and family expectations and manage them with education resources and empowered staff.

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