FSA 2021-2022 Impact Report

About FSA

Friends Services Alliance (FSA) is a national professional association of values-aligned organizations that serve seniors. We support both staff and governing boards of CCRCs/life plan communities, home care groups, foundations and others by providing a spectrum of professional services specifically designed for our industry.

Mission

To advance the performance of values-aligned organizations that serve seniors through training, services and relationships.

Vision

A growing collaborative of organizations that serve seniors: focused on excellence, prepared for the future.

Values

Inner light, integrity, gentle bravery, being community, presence.

The aging services sector continues to adapt and reinvent itself in response to unprecedented challenges brought about by COVID-19; the need to create a more diverse and equitable culture; and a staffing crisis beyond any we've encountered before.

The FSA 2021-2022 Impact report is focused on the ways in which FSA has worked to rethink, rebuild and renew our approach in support of our membership, both now and in the future.

Upgraded Dues Structure

Effective January 2021, FSA's upgraded dues structure reflects a focus on simplifying the framework and eliminating potential barriers to membership. The new structure is based upon an organization's number of units/members. Annual dues will be capped so as not to penalize organizations as they grow, and surcharges for additional programs that were formerly paid were eliminated.

We Have Moved!

FSA
Friends Services Alliance
300

In December, we moved our office to 460 Norristown Road in Blue Bell. FSA now shares space with member organization Friends Life Care Partners just across the street from our former building. The new spot allows both organizations to share use of a designated training room and small conference space for educational sessions and meetings.

New Website

You support seniors.
We support you.
Programs and Services

Resource Center

Last March, FSA launched a redesigned and restructured website, online community and member database.

New site features:

- Multi-level password-protected library of nearly 250 resources.
- New online member community chat feature.
- Senior service finder with directory of FSA member organizations.

Responding to Your Needs

In the summer of 2021, FSA conducted a market research study to gauge the efficacy of our communications, educational programming and consulting. Here is what we learned:

Member Needs

- Easy-access education for all levels of staff
- New supervisor training
- A focus on employee retention

FSA's Action

- Virtual Learning Labs with a variety of themes suited to all staff
- Increased on-site, organization-specific trainings for groups of employees
- Specific training in essential tools for new supervisors, conflict resolution, and transitioning from peer to leader
- New Director of Nursing mentorship program; Learning Lab retention and personal development series

> **Having FSA come to the community/organization site is well received, as this makes the best use of staff time and maximizes the number of staff that may attend. In-person learning is valued, as it allows for the most interaction and the ability to make connections with peers, as well as offering the ability to focus on the topic with less distraction.**
>
> –Education market research final report, 2021

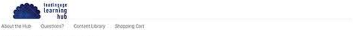
Board & Organizational Development

This year, FSA's board/organizational development efforts included strategic planning, retreat design and facilitation as well as both in-person and virtual consultation.

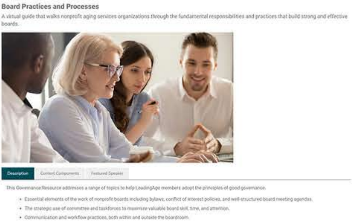
Areas of focus included:

- Quaker Values in Organizational Life
- Board Development, Structure, Assessment and Roles
- Boards and Compliance
- Independent CEO Evaluation

In addition, Jane Mack, President and CEO, created the "Board Practices



and Processes" Governance Resource, available through the LeadingAge Learning Hub. This virtual guide walks nonprofit aging services organizations through the fundamental responsibilities and practices that build strong, effective boards. Jane also presented on the Institutes of Medicine's Quality of Life framework in quality indicators at the October FSA Compliance Conference.



Board Practices and Processes

A virtual guide that walks nonprofit aging services organizations through the fundamental responsibilities and practices that build strong and effective boards.

This Governance Resource addresses a range of topics to help LeadingAge members adopt the principles of good governance.

- Essential elements of the work of nonprofit boards including bylaws, conflict of interest policies, and well-structured board meeting agendas.
- The strategic use of committee and taskforces to maximize valuable board skill, time, and attention.
- Communication and workflow practices, both within and outside the boardroom.

Compliance & Risk Management

The challenges of COVID-19 did not deter Compliance and Risk Management efforts.

A total of 1,000 days were scheduled with activities for 320 Compliance reviews

Each Compliance staff person completed an average of 40 audits and spent 128 days on reviews. 1.23 audits were completed each and every working day.

We served 96 Compliance partner organizations with a total of 145 sites.

We function as the compliance officer for 56 communities.

Six NEW Compliance partner organizations were added this year.

Total number of states represented:
Compliance: 17
Risk: 6

Total number of Risk partner organizations: 22. 1 NEW Risk partner organization.

28 onsite Risk Management visits, 50 virtual visits.

New! Director of Nursing (DON) Mentorship Program

The program is aimed at assisting new DONs through development of leadership skills necessary for this role.

"At any time, we can reach out for help with a simple question or to get guidance or a recommendation. FSA helped me in the development of a comprehensive governing board report and education to successfully engage our board members in their oversight of the quality and compliance programs of the organization.

(We are) so grateful to have the leadership and guidance of the FSA Compliance Program. Each year, we are able to evolve and grow in the effectiveness of our organization's compliance program."

Candace Mason, RN, BS, Director of Quality Outcomes & Risk Management, Compliance Official, Phoebe Ministries, Allentown, PA

We held:

6 Compliance webinars

with an average of 150 attendees at each

Topics:

- Right of Access/Interoperability Rule
- Infection Control
- DOJ Evaluations
- 21st Century Cures Act
- Compliance Risk Assessment
- Vaccine Mandates

Three Risk Management webinars with 30 members at each.

Eight organizations took advantage of FSA's group rate for PolicyStat policy management software designed for healthcare. Designed to work with PEER, FSA's electronic event reporting system, participants are able to access historical records of policies and report and track events in one place.

8th Annual Compliance and Risk Management Conference

A virtual multi-session exploration of the most pressing issues of 2021, including:
- Cyber Liability and Ransomware in Senior Living
- Trauma-Informed Care
- Employment Pitfalls in the Post-COVID Workplace
- Cultural Competence
- HIPAA Changes

121 Leaders

64 Communities

Compliance Virtual Connected Community

95 topics, including:
- Nursing documentation
- Credentialing
- Resident satisfaction
- COVID requirements for vendors and contractors
- CDC travel guidance
- Flu vaccines
- Mentorship programs

…and more

New community initiated
March 2021

180 engaged members

The FSA Compliance blog received more than 750 views and covered timely topics such as HIPAA Rules for Protecting ePHI, Covid-19 Safety Plan Compliance with OSHA's ETS, and the CMS 2022 Hospice Survey Reform's meaning.

> "(FSA Compliance) explains the new and changing federal guidelines, so we understand exactly what is expected. Plus, I can always ask for input when we are creating a policy. We don't have to start from scratch, which is so helpful for a staff that wears many hats."

Taylor Lehman, Vice President of Human Resources, Swiss Village, Berne, IN

Education & Training

Keeping your entire team a step ahead.

Learning Labs

Virtual trainings on timely topics for employees at all levels. In response to member input, we added 10 new programs.

New learning tracks:
- Diversity
- Employee Retention
- Leadership
- Personal Development

278 Registrants

353,002 Minutes Spent on Zoom Meetings

14 Learning Lab Programs since April 2021

FSA Leadership Institute

The ninth cohort completed its leadership journey with us this year.

Total number of participants since inception: 80

Diversity & Inclusion

Our focus on diversity, equity and inclusion grew this year through open conversations and special programs. We worked with organizations to deliver 21 customized training programs to employees and leadership.

Topics included:

- Ouch! That Stereotype Hurts
- When Cultures Meet
- Unconscious Bias
- Brave Spaces

Linda Sterthous, Executive Director, Barclay Friends, West Chester, PA

> "The Barclay Friends Leadership Team was looking for a structured way to set some goals for our work together in the area of Diversity, Equity and Inclusion (DEI). Marsha Wesley Coleman helped us take our efforts to the next level through the use of a personalized Intercultural Development Inventory completed by each leadership team member, with personalized coaching. She followed up with the workshop "Ouch! That Stereotype Hurts." Marsha's thoughtful facilitation and non-judgmental style created an atmosphere of trust and openness, allowing honest discussions. As a result, our Leadership Team's commitment to DEI was energized and focused for the future."

In July, FSA joined members from Broadmead, Inc., and Foulkeways at Gwynedd at the Chi Eta Phi Sorority, Incorporated national conference. Meeting the professional and student nurse members of this professional service organization was a great way to introduce them to the possibilities of working within FSA member organizations.

FSA Internship Program

Member organizations modified their programming to accommodate virtual and hybrid internships.

5 Internships in Summer 2021. FSA's first intern ever.

8 opportunities offered by member organizations for the summer of 2022

62 completed since the inception of the Internship program 11 years ago

"I loved every moment of the ten weeks I was at Foxdale. I learned countless lessons from (my preceptor) and others, achieved the goals set for my experience, and gained new interests that may lead me down a career path I didn't consider going into my internship. I've created several connections that I know will be beneficial to me in the future and lasting memories that will help me become a better healthcare leader"

Connor Burke, Residency Intern at Foxdale Village

"Every day I was taught something new that often went beyond the diversity office. I learned how diversity plays a role in even the smallest things that we do not think about."

Sheila Nalwoga, Diversity, Equity and Inclusion Intern at
Broadmead, Cockeysville, MD.

Collaborations

67% of eligible organizations participate in collaborative Insurance programs

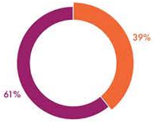
34 Peer Group sessions held. Current Peer Groups: Administrative Assistants, Admissions Marketing., CEO, CFO, Development Directors, Diversity, Resident Services, Human Resources

29 Job postings. Postings on fsainfo.org receive increased visibility through Indeed.com and Glassdoor.com

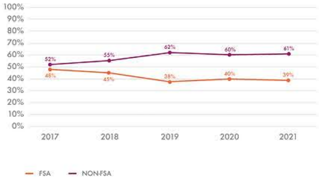
Financial Highlights

FSA Member vs. Non-Member Income

FSA Income vs.
Non-FSA Income 2021

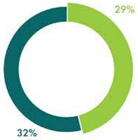


FSA Income vs. Non-FSA Income Trend

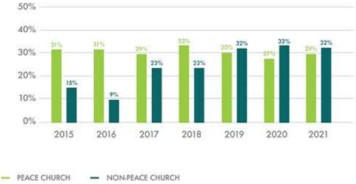


Non-Member Income

Non-FSA Income 2021
(out of 61%)

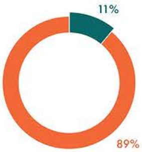


Non-FSA Income Trend

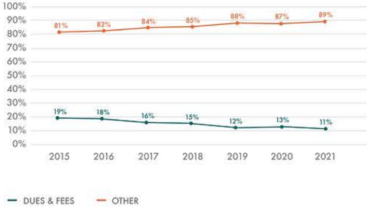


Revenue - From Dues & Fees

% Revenue From Dues & Fees 2021



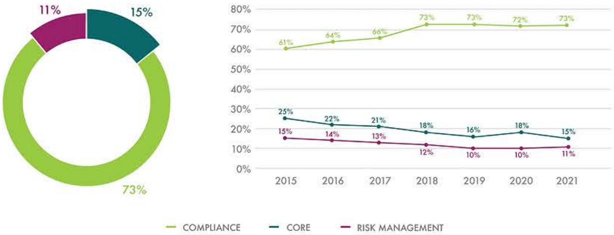
% Revenue From Dues & Fees Trend

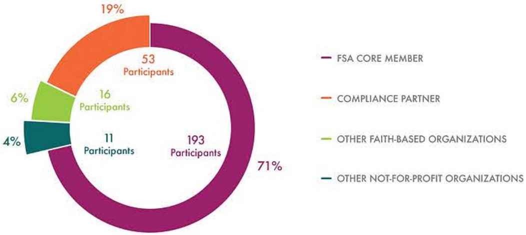


Revenue - By Program

Revenue By Program 2021

Revenue By Program Trend



Learning Lab Participation - By Type (Out of 273 Participants)