

2008

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Recommended Citation

Cooper, C. & Walker, G. (2008). Making Affordable Assisted Living Work: The Mountainside Senior Living Story. *Age in Action*, 23(3), 1-5.

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Case Study

Making Affordable Assisted Living Work: The Mountainside Senior Living Story

by Cheryl Cooper, MA, BS
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Educational Objectives

1. Describe the challenges of providing affordable assisted living in Virginia.
2. Describe the experience of the Jefferson Area Board for the Aging (JABA), an Area Agency on Aging, in becoming owner and operator of an assisted living facility.
3. Describe the culture change that made Mountainside a unique and award-winning facility.

Background

The six-story structure in Crozet, Virginia that today is Mountainside Senior Living was originally built as the Carter Cold Storage facility in 1912. It served the large-scale local fruit industry and, with an addition in 1919, the facility handled over 40,000 barrels of fruit and

manufactured ice, in addition to supplying electricity and water to the residents of Crozet.

As fruit production decreased and the need for cold storage declined, the building served multiple purposes, such as a general store, movie house, and finally a hardware store, before it was purchased in 1978 for renovation into senior living apartments. The renamed Windham opened in 1981 with accommodations for 100. When the local owners sold the facility to a national long-term care chain, the new owners focused on squeezing 140 residents into the facility. Ninety percent of these residents were enrolled in the auxiliary grant (AG) program.

Over the course of several years, problems mounted. In 2000, the chain closed a Charlottesville nursing home with 30 days notice, forcing many residents to be dispersed throughout Virginia. Now, facing Chapter 11 in 2001, the corporate owners put Windham on the market and closure was imminent.

JABA expressed concern immediately. One hundred forty residents

were about to be “homeless” and more than 50 staff faced unemployment. The closure would also mean the loss of 50% of the local AG beds.

With no apparent new owner, JABA responded with a business strategy to keep the facility operating. The mantra of the marketing plan was and still is, “*It takes a community to save a community.*” The communities of Charlottesville, Crozet, and Albemarle County came together to raise public and private funds to erase debt, make capital improvements and, thus, be better positioned to be competitive. Private pay residents would be recruited. Their fees, plus on-going fundraising and local government allocations, would assure affordability for persons unable to pay market rates. The facility came under JABA ownership in June, 2002 which renamed it Mountainside Senior Living.

Providing Assisted Living in Virginia

The Auxiliary Grant System (AG) is a state supported supplement to the income of assisted living

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residents of low income. The AG payment partially covers the cost of room and board in the facility, transportation, recreational activities, and general maintenance and care, including assistance with personal hygiene, medication administration, and management of a personal care allowance of \$77 a month.

The current AG rate is \$1,075 monthly (\$1,236 in Northern Virginia.) The cost of providing care at Mountainside is \$1,700 a month, a \$600 difference subsidized by donations, private pay fees, and fundraising. To achieve solvency, JABA set an enrollment target of having at least 40% of the residents paying privately. In a local market where the current average monthly payment for assisted living is about \$3,200, JABA pegged its private pay rate at approximately 80% of market rate, thus making it affordable to middle income persons, while preserving almost half of its rooms for AG-eligible Virginians.

Making the Transition: The “Easy” Steps

The keys to attracting residents lay in making the facility more attractive in various ways, most importantly, improving the quality of life for residents and staff. To maximize AG income and space, the previous owner put three residents in rooms designed for two. That owner also admitted residents whose care needs were greater than what could be met in assisted living. For instance, several residents had psychological and emotional conditions that needed other, more sophisticated types of care. As a

first step, JABA worked with staff members of the local Department of Social Services and the Region Ten Community Services Board to identify residents needing placements in facilities that could more appropriately meet their needs. This move created a resident mix more suitable for assisted living, while allowing residents to live in either private or two-person rooms. The census was thereby reduced from 140 to 118.

As for staff, association with JABA has meant better wages and benefits, improved working conditions, and regular training. JABA’s goal is to pay a living wage for all employees and provide health insurance options.

Moving ahead progressively with compensation meant looking for ways to be cost efficient while upgrading resident care. By introducing on-site management, JABA and Mountainside staff took several steps to make this happen: consolidating administrative positions, finding new vendors for bulk purchasing, reducing staff overtime and use of agency staffing, and retaining a medical director. The results included a more satisfied and stable workforce, which, in turn, led to enhanced resident satisfaction and a growing improvement in Mountainside’s reputation in the community.

Addressing the aged physical plant proved to be a more tangible, less easily achievable challenge. What made sense in assisted living design in 1981 had changed considerably by 2002. Residents desired common internal and external space where they could socialize and par-

ticipate in activities. There was need for a nursing clinic, and for designated staff meeting areas, and dining space for residents and families. To meet these needs, JABA created sitting areas on each floor to bring a more home-like environment to the otherwise long hall and institutional look. Each floor was redecorated and given a neighborhood name chosen by the residents. Rooms have been redecorated and recarpeted for a warmer look. Activity space was enlarged and equipped with better entertainment equipment, and outside space was modified for gardens and outdoor seating.

Making the REAL Transition: Culture Change

To address what Dr. Bill Thomas, founder of the Eden Alternative and the Green House model, calls the nursing home plague of boredom, hopelessness, and helplessness, staff at Mountainside emphasize the importance of a community/neighborhood environment. Persons living at Mountainside are a part of the larger community of Crozet. Conversely, Crozet’s residents are involved in the lives of Mountainside’s residents. The physical structure that is Mountainside dominates downtown Crozet. We have all paid special attention to making sure that the larger community recognizes that this imposing structure is home to real people. The more opportunity the community has to come into the building and meet the residents, the stronger the bond among all community members. To that end, Mountainside staff members encourage visits and exchanges in the following ways:

- Community organizations meet at Mountainside regularly.
- Local church ministers conduct services and activities throughout the week.
- Volunteers of all generations come in to chat with residents, provide group activities, and take residents to appointments.
- Residents at Mountainside are volunteers themselves. The Mountainside choir visits local nursing homes and child care centers to sing. Residents make and deliver gifts to those living in nursing homes. Soon they will collaborate with elementary students to produce digital recordings of Crozet's history through songs written and performed by the students.
- By purchasing local produce for meals, Mountainside is supporting the local economy and community. Growers know that their product is part of a major effort to build a sustainable operation for over 100 people living at Mountainside.
- Mountainside staff members are creative in planning and holding fund raising activities that involve the community. For example, each year, Mountainside hosts a music festival with local bands and singers performing for the general public; local pet owners and pet shop owners help create a day long petting zoo in the outdoor yards at Mountainside that is visited by local children; staff members at Mountainside take orders for sub sandwiches, then make and deliver the orders; some people stop in for their sandwiches, creating an opportunity for members of the community to come into the facility and meet those who live and work there; and a Spaghetti Supper at the local firehouse is an opportunity for residents to be out with members of

the community.

At the same time, considerable attention has been given to including and involving residents in making decisions that affect them and how they live at Mountainside. The ongoing opportunities include:

- Monthly Floor Parties when residents voice their opinions on any aspect of the facility operation and life at Mountainside.
- A Resident Council in which two volunteers from each floor bring issues discussed at the floor parties for further discussion with staff members and other residents. Feedback from these meetings is given to staff responsible for nutrition, housekeeping, activities, nursing, finance and general administration.
- A Nutrition Council, open to all residents, discusses the menu, food preferences and ideas for preparation of some of the new local food items available for meals.
- Several residents serve on committees, such as the Welcoming Committee, which offers new residents support and friendship during what can be a difficult transition; members of the committee ensure the bulletin board keeps all residents up-to-date on what's going on, so all can participate in the activities they enjoy; and the Gardening Committee, whose members are very active with flower beds and vegetable gardens; fresh herbs from these gardens season many meals; in fact, this group functions as Mountainside's own "Master Gardener" group, helping others to fill and maintain the planters on the balconies of resident rooms.

The Employee Involvement Group

at Mountainside (named the Harvesters) is a very real demonstration of commitment to culture change. Like the formation of Floor Parties and the various councils and committees for residents, staff members are encouraged to voice constructive opinions and ideas. This goes beyond a one-time or annual survey. There is an opportunity for developing participation in decisions about how to do things for and by staff in the facility. Along with that comes responsibility and accountability to team members and co-workers. The Harvesters' motto—*Together as One*—and their mission—*Building a unified employee team to support and help each other*—indicate the work this group is setting out to do. Culture change is about empowering residents and staff, and the Mountainside staff members are empowering themselves and each other through this process.

The Culture Change experience at Mountainside is a project funded primarily through a grant from the federal Centers for Medicare and Medicaid Services. The project's 2006 report ended with the following:

"We believe that Culture Change in long-term care can be reduced to two questions:

- Would I want to live here?*
- Would I want to work here?*

To the extent these questions are answered affirmatively – for residents and staff – we will be successful in actually changing the culture of long-term care within our community."

What's Next?

In November, 2007 JABA received a *Best Housing Award* from Governor Tim Kaine. JABA is gratified to know that Mountainside is on the right track. JABA has the ongoing challenge of sustaining the change in culture and continuing a positive evolution. There is no endpoint, no finished product. There is always room for improvement and an opportunity to share what is learned, so that others can replicate Mountainside's results in long-term care settings across the country.

Mountainside continues to make progress in providing excellent care in this unique setting. With the May, 2008 VDSS survey, the facility was awarded a two-year license. This truly demonstrates JABA's and Mountainside's commitment to providing a home where people want to live and work. Now with a waiting list, JABA is designing plans to expand the number of affordable assisted living units, while also adding independent "living with assistance" apartments. This expansion is part of a major facelift for downtown Crozet and will result in more aging-in-place options for a growing older population.

Case Studies

Resident Paying Privately. Martha is an 83-year-old female, retired from a long career in nursing, who had been living in her own home in Charlottesville. As an active volunteer at Mountainside, she planted and took care of the flower beds. At a social event, she fell and broke her hip. Following a course of rehabilitation at a skilled nursing

facility, she realized that she was not able to continue to live alone and care for her home. She decided to move into Mountainside because her son already lived there and it was affordable. (Having been a nurse prior to the time of high salaries, her savings were modest.) The Crozet community is also convenient. The library is within walking distance and she and her niece belong to the book club there. She is able to drive when she needs to, but she can walk to the bank, library, and area stores. Martha weeds the garden bank behind the outdoor seating area, and maintains flowers there and around the building. The herbs from her garden are used to season the meals for all of the residents. Staff members report that they learn something valuable from her daily. Martha admits now that she was actually quite lonely at home by herself. In contrast, she currently has many friends who live or work at Mountainside. She believes so strongly in the importance of Mountainside that she appeared before the Charlottesville City Council in April to advocate for an increase in funding. Thanks in large part to her appeal, the Council approved the funding request and asked that she return to provide updates on life at Mountainside.

Resident Receiving Auxiliary Grant. William is a 58-year-old male who was referred to Mountainside by the Department of Social Services. He had been living with a cousin, but she passed away and their home was condemned by the City of Charlottesville. He had nowhere to go. In the year that he has been living at Mountainside, he has become a changed man.

Previously isolated, he enjoys "hanging out" with the other residents and participates in all of the activities. He loves being around people. William is followed by the Region Ten Community Services Board and attends agency programs about three days a week. The challenge for William is having only \$77.00 a month in personal allowance left from his auxiliary grant. This has to pay for all his ancillary charges, co-payment on his medicine, and he is a smoker. The case manager at Mountainside works with him and Region Ten to reduce his medication costs by enrolling him in prescription plans and applying for reduced cost medications whenever possible. Health Services staff, Region Ten, and his physician all encourage him to reduce or stop his smoking. Without Mountainside, who knows where William would be. Now, he is happy and content living with a group of friends who truly care for him.

Study Questions

1. What lessons does the Mountainside experience provide in making assisted living affordable for persons of low to moderate income?
2. What risks are involved when management decentralizes decision-making to include greater resident and staff participation?
3. How can the owners and operators of assisted living facilities assure the engagement of their residents in the life of the larger community?

References:

For more information on culture change, visit:

www.andthoushalthonor.org

www.Edenalternative.org

www.caregivereducation.org/culture.htm

directcareclearinghouse.org

www.nccnhr.org (and search Culture Change)

www.tlcinltc.org/pioneerpractices

About the Authors



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