

The IALA Advisor

News from IALA – Iowa Assisted Living Association



Iowa Assisted
Living Association

IALA Spring Conference REVIEW “Enhancing the Memory Care & Assisted Living Experience”

On behalf of the IALA Education Committee, we would like to thank each and every one of you who participated in the IALA 2014 Spring Conference! It was a fantastic day filled with great speakers from DIA and the Carden Group who shared invaluable information for each of us to bring back to our communities to assist us in our quest of enhancing the lives of our residents!

The IALA Education Committee is already gearing up for the 2014 IALA Annual Conference. This year’s Conference will be held on August 27th and 28th at the Holiday Inn & Suites – Jordan Creek in West Des Moines.



We are planning a full two-day event that is filled with exciting and new speakers, vendors and some incredible new technology that you can actually explore and try out during the conference, as well as some FUN mystery surprises and Grand Raffle Prizes each day of the Conference!

**IT’S BIGGER...IT’S BETTER AND YOU WILL NOT WANT TO MISS
THE 2014 ANNUAL CONFERENCE!!**

Watch for updates and remember to
Register Early to ensure your spot at the conference.

Continued

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President's Message

Allison Law

At our most recent Board of Directors meeting, I was very pleased to learn that the Iowa Assisted Living Association has TRIPLED over the last year in membership! I was truly surprised, however have since understood why.....the association is led by a fabulous and well-rounded Board of Directors that is most interested in "Keeping Assisted Living Assisted Living" and giving back to each of the members through educational and networking opportunities at a very affordable rate!

For those current members, you should have received your renewal letters in the mail; thank you for your support in 2014-15! For providers that are not yet members....now is your chance to join to ensure you are receiving the benefits as soon as possible.

The Iowa Assisted Living Association Education committee held a wonderful spring conference on February 26th at the West Des Moines Learning Center. The day consisted of a very educational, informal presentation by Jim Berkley and Rose Boccella with the Iowa Department of Inspections and Appeals. They provided updates on recent rule changes, as well as opened the day up to questions and conversations. What a great collaboration the Association has with the Department! The day ended with some motivational inspiration from the Carden Group---and if you missed this at the Spring Conference, the Education Committee will be having the group at the Annual Conference in August. Speaking of the Annual Conference, the Education Committee has a full two days already outlined and planned, so please mark your calendar for August 27th and 28th. It will be a great opportunity to network, earn CEUs and have FUN!

Welcome new members! Please take a moment to read the article provided by one of our new featured associate members, Debbie Davis, owner of Strategic Tax Services. If you'd like to be featured, please contact Shellie at the IALA office.

Enjoy the spring weather which is hopefully here to stay!

Allison
Allison Law
IALA President

Welcome Spring!

Continued from Cover Story

Announcing... 2014 Fall/Winter Conference

IALA is happy to announce that we are also planning a Fall Conference that will focus on customer service and communication for your Universal Workers. Your Universal Workers are your frontline team and have direct contact everyday with each resident, family member and visitor that walks through your doors. Ensuring your Universal Workers have a venue for continued education enhances their job satisfaction which in turn enhances the quality of life for your residents and your community overall. Watch for upcoming information for this one-day session.

Again, thank you ALL for attending the IALA 2014 Spring Conference and **SEE YOU** at the Annual Conference in August!

Peggy Luciano RN
Chair, Education Committee

IALA Is All About YOU!

Renee' LePera, Membership Committee Chair

IALA is continuing to welcome new members in 2014. We are very excited about the response to membership in the first quarter of 2014 and want to continue to build YOUR ASSOCIATION. IALA membership offers our members excellent education, the most recent updates to regulatory changes and governmental issues that affect assisted living. The most important value IALA offers is YOU. The opportunity to network with other assisted living providers, sharing best practices and innovations for the industry we love. Our associate members offer you the ability to see the newest trends in products and services in the assisted living industry.

If you are not currently a member of IALA, I encourage you to get in touch with me today so we can discuss the many reasons you should join IALA for 2014. Feel free to e-mail or call me to discuss how IALA can benefit your assisted living community in 2014. I can be reached at rlepera@seniorhousingcompanies.com or via cell 515.577.0695. Iowa Assisted Living Association is the only association for assisted living in Iowa focused strictly on assisted living, so don't miss this opportunity to be a part of it!

Membership in IALA is affordable! IALA offers membership rates at \$15 per certified apartment. IALA also offers a flat membership rate for Affordable Assisted Living Programs. Membership applications are available by contacting Shellie at the IALA office at 515-278-8700 or via email at: info@ialaonline.net.

Join IALA TODAY for a better TOMORROW!!

Governmental Affairs Report

Committee: Debbie Fisher, Chair, Joy Cox, Ann Martin, Linda Duffy

We were surprised in early March to see a discussion draft of a proposed amendment to Chapter 69 that would add a rule to Assisted Living Program regulations addressing Respite Care Services. What precipitated the proposed amendment is unclear, but we do know that state leadership has challenged all departments to review current rules and regulations to identify potential gaps or clarifications that might be needed. As drafted, the proposed changes to Chapter 69 would not be helpful to ALP's or the clients we serve. Please visit the IALA website www.ialaonline.net to see the proposed rule changes and IALA's comments that were provided to the DIA. If, after reviewing, you have any concerns you feel were missed, please feel to contact me directly at dfisher@newburyliving.com.

For those who attended our wonderful Spring Training event on February 26th, you may recall I posed a question to Rose and Jim about DIA's expectations for educating outside contractors working in our dementia-specific ALP's. For instance, plumbers, carpenters, carpet layers and other types of services oriented workers who may actually spend several hours in a building, and quite naturally, come in contact with our tenants. In particular, did DIA expect dementia-specific ALP's to provide a certain number of hours education to contractors in that capacity. I am pleased to share Rose Boccella's reply: ***"For the plumbers and carpenters etc., 8 hours of dementia training is not required. The program can do a limited amount of educating the workers about the population so they have some understanding of folks with dementia. It will be up to each program to determine what this limited training consists of."*** This is good news! If anyone has already created a "Dementia 101" for use with contractors or visitors to your community, we invite you to share it with your fellow IALA members by contacting Shellie at the IALA office. Likewise, if our members feel there is a need for a communication piece that would deliver a consistent Dementia 101 message to our building service people, etc., please get in touch with me, and your IALA leadership will develop a standard for member's use.

Other areas of which to take note: There was a January 1, 2014 update to the Iowa Food Code that will affect assisted living licensed food operations. Please check the IALA Website for links to documents with which you'll need to become familiar to meet the new requirements, as well as contact information for DIA staff that may help you address immediate concerns. We have been in contact with DIA Food Training Specialist Mark Speltz, and hope to have DIA food training representatives at our annual conference in August to help answer our food-related questions. As we begin renewing our food service licenses, we'll be expected to comply with the updated regulations, and staff in Mark's department is ready to help.

The 2014 Legislative session is not only in full swing, but moving towards the home stretch. I feel fortunate to report that there haven't been any major changes that would affect assisted living operations.

As always, if there is any fast-breaking news concerning new rules or legislation, you'll be sure to hear from us!

Debbie Fisher
Chair



For Immediate Release

A Decade of Rolling out the Red Carpet



“Senior Housing Management and our President Allen Phillips are celebrating their 10 year anniversary today....it's a HUGE accomplishment and milestone for our organization, mentioned Allison Law, Vice President and Operations Manager, Senior Housing.”

Pete Jones, Brand Manager
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Des Moines, IA – We are very happy to celebrate with [Senior Housing](#) today, on their 10 Year Anniversary!!

Our relationship dates back to 2007, when we first began assisting them with their commitment to human capital management. Since that time both of our organizations have grown and adapted to the market place. We are very proud to have Senior Housing as our partner, and truly excited for the next 10 years.

"It's an honor to work with such a quality organization, dedicated to employee and resident well being, said Lisa Welshhons, President of Merit Senior Living."

“Senior Housing Management and our President Allen Phillips are celebrating their 10 year anniversary today....it's a HUGE accomplishment and milestone for our organization, mentioned Allison Law, Vice President and Operations Manager, Senior Housing.”

About Senior Housing

Since 2004, Senior Housing has supported two specific businesses, Senior Housing Consultants and Senior Housing Management. Senior Housing Consultants works with a wide variety of senior living providers from nursing homes looking to add assisted living, new owner's looking to build new assisted living communities, as well as working with existing assisted living providers to enhance their current operations. Senior Housing Management partners with senior living communities to achieve the highest quality of service and financial success. They currently work with 14 communities across the Midwest.

More information about Merit Senior Living can be found on
www.MeritSeniorLiving.com.

*Do you have similar information about your community?
Email to: info@ialaonline.net to be featured in future IALA newsletter.*

Thank You!

To Our 2014 Spring Conference Sponsors



Senior Housing Management manages 14 assisted living and memory care communities in the state of Iowa. The Senior Housing Management mission is simple: To lead the senior housing industry by providing Red Carpet Treatment through our core values for all of our customers. Senior Housing Management has an experienced team of operational and nursing experts that provide monitoring through a detailed quality assurance process. This team of experts ensures the on-site management team at each community has the support needed twenty-four hours a day; seven days a week. Senior Housing believes that all residents deserve to live life to the fullest. This is achieved through a "Dare to Dream" program and residents' interests are enhanced by specialized Life Enrichment Programming.



As an Independent Partner of PointClickCare, **Creative Solutions Unlimited, Inc.** (CSU) sells and supports PointClickCare's EHR software for independent providers and small corporate groups of assisted living programs and nursing homes in Iowa. CSU has earned an excellent reputation for service and support, offering premium implementation and end-user support to the independent provider market.

CSU also provides low cost, low maintenance website design and service and produces **Web Watch**, a free Internet-based news post service for long-term care professionals available on its website, www.creativesolutionsunlimited.com.



Impact Marketing & Technology

Impact Marketing & Technology houses an elite team of creative professionals with the technical expertise, experience and resources to properly deliver your mission critical message to your market. From ink on paper to pixel perfection, IM&T will develop your brand and make sure everyone knows exactly who you are.



To date **Merit Senior Living** (Merit) serves in excess of 12,000 employees, in more than 30 states, and over 40 senior living communities. Merit is the largest Professional Employer Organization (PEO) in the nation that provides premier Human Resources services to the Senior Living industry. Organizations partner with Merit for: Health Insurance & Employee Benefits administration, Health Care Reform tracking/reporting/compliance, Payroll and Payroll Tax administration, Workers' Compensation, and on demand HR guidance (among others of course).

We're able to identify for our clients hard cost savings, staff time savings, liability and compliance transfer, and predictable cash flow. What does this mean to your community? Saving money is always good, and happy/healthy employees means lower turnover which increases occupancy rates. www.meritseniorliving.com.



STRATEGIC TAX SERVICES, INC.

Message from Deborah Davis

Recent property tax reform in Iowa will eventually provide some relief to commercial property owners, who have one of the highest tax rates in the nation. The focus of our firm has been seniors housing in Iowa. We would welcome the opportunity to review the assessment of your property.

Deborah specializes in the property tax valuation of commercial real estate, with a primary focus on Midwest income properties. Deborah has more than 20 years of property tax experience and has worked extensively with seniors housing, apartment, health care, retail, hotel, and office properties. Her experience in real estate provides her with the skills to negotiate lower tax values at informal levels and defend values before Boards of Appeal.

Property Tax Issues for IOWA

- Iowa typically reassesses the value of all properties during odd-numbered years. However, many counties are doing reassessments for 2014.
- Appeals can now be filed between April 1st and May 5th.
- Recent 2013 property tax reform will provide a 5% rollback on commercial property values for the 2013 tax year and 10% for the 2014 tax year. A new Multi-Residential class was created and will be phased in over 10 years, eventually being taxed at the Residential rate.
- It is expected that assessed values and tax rates will increase over time, offsetting some of this savings.
- Rigorous monitoring of assessments, changes, and market conditions will help property owners a fair and lawful property tax assessment.

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Property Tax Issues for Seniors Housing

- Definitions of “market value” vary greatly, depending on whether it is for federal tax, property tax, or financing purposes.
- Many assessors use an income based approach to set the real estate tax value for seniors housing. However, that income should only be from the real estate rents and should NOT include any revenue from services or personal property.
- Property tax planning should be a critical part of any transaction and should be included in your due diligence.
- Assessors often mass appraise, relying on data that can be dated and misleading, especially in volatile markets.
- Many states require that transfer declarations be filed at the time of sale, with buyers and sellers often stating the full value of the going-concern sale as ‘real estate’ for federal tax or financing purposes.
- Tax assessors receive copies of these transfer declarations and without evidence to the contrary, place weight on the value that has been declared on that form, often resulting in increases to the assessment.
- Sales data of seniors housing properties can be misleading since those sales may include value from the business.
- Real estate tax assessments exclude the value of personal property, such as kitchen equipment, dining equipment, common area furniture, etc.

More information about our services can be found at www.strategictaxservices.com.

Deborah Davis, CMI, CPA can be reached at ddavis@strategictaxservices.com or at 312.643.5000 or by cell phone at 312.925.2550.

IOWA ASSISTED LIVING ASSOCIATION ♦ MEMBERSHIP APPLICATION

Annual membership fees run April 1 through March 31
 Membership dues will be pro-rated to the first of the month in which the application is received

Company Name: _____ No. of Units: _____

Contact Person and Title: _____

Address: _____

City/State/Zip: _____

Phone: _____ Fax: _____

Email: _____ WWW: _____

Please check the membership type that best fits you or your company.

- Certified Assisted Living Providers and Licensed Residential Care Facilities:** A facility that provides assisted living services. Provide a list of these communities on the reverse side. Also attach a copy of the certificate of occupancy or certification evidencing resident capacity. If a multi-facility provider, all facilities must join individually.
- Affordable Living Providers:** Independent living, nursing homes, hospitals, and any other senior housing/service/care alternatives, including developers. Flat fee based on resident capacity.
- Non-Providers:** Independent living, nursing homes, hospitals, and any other senior housing/service/care alternatives, including developers. Flat fee based on resident capacity.
- Friend of the Industry:** Government related, student or senior.

State Membership

	<i>Certified Provider</i>	<i>Affordable Living Provider</i>	<i>Non-Providers</i>	<i>Friend of the Industry</i>
Base Fee	N/A	\$300	N/A	\$100
Per Resident Fee Minimum	\$15 \$300		\$300 20 or fewer \$500 21 - 74 \$750 75 or more	
ANNUAL FEE Apr. 1 - Mar. 31				

Indicate (X) payment mode:

Check # _____ (Payable to IALA) or AmExp ____ Discover ____ M/C ____ Visa ____

Credit Card # _____ CV2 code on back of card _____

Exp. Date _____ Signature _____

Please complete and return this form with payment to:

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Welcome New Associate Members

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kbehnke@bradleyriley.com
bradleyriley.com

Brad Lang
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Cedar Rapids
319-862-0384
blang@solumlangarchitects.com
solumlangarchitects.com

Deborah Davis
Strategic Tax Services, Inc.
Chicago IL
312-643-5000 or 312-925-2550
ddavis@strategictaxservices.com
strategictaxservices.com

Welcome New Affordable AL Member

Linda Judkins - **Rose of Council Bluffs (76 Units)**, Council Bluffs IA
712-322-1000 ♦ lindaroseofcb@qwestoffice.net ♦ www.evergreenredo.com



Welcome Spring!!