When the history of assisted living is written, the current period is likely to mark a dividing line between two distinct stages. The first was characterized by pioneering efforts to create a new type of service where the physical plant, service delivery model and approach to staffing support a philosophy of privacy, dignity, and consumer choice. The policy discussions during this early stage were dominated by defining assisted living and distinguishing it from other types of services, such as nursing homes and old-style board and care.

But the rapid growth of assisted living has been a major factor in moving discussions about the future of long-term care to a whole new stage. The assisted living principles of privacy, dignity and consumer choice have become accepted by public policy decision-makers across the political spectrum as they advocate more home and community-based service options. Competition from assisted living is undoubtedly a major driver of culture change in institutional environments, resulting in more private rooms and residential living environments, greater consumer choice in services and staffing models that enhance the role of direct-care staff.

In short, assisted living has been instrumental in creating a much more diverse landscape of services for older people with disabilities, a landscape that calls for new thinking about ways to promote quality of services and quality of life, new navigation tools to help consumers find services that best meet their needs and new public policies to make these options affordable to those with modest means. In 2007, the Center for Excellence in Assisted Living took a number of steps to address these issues, including:

- Continuing research with the University of North Carolina on the role of direct-care workers in managing medications while developing a model for using research in making important decisions related to practice and policy
- Organizing a symposium of diverse thought leaders held in early 2008 to discuss and explore quality and safety issues for medication management in assisted living
- Partnering with the Agency for Healthcare Research and Quality to develop model disclosures so that consumers will have better information upon which to make decisions among the increasingly diverse array of care options
- Expanding our information clearinghouse to make it a useful tool for all stakeholders in assisted living and related care options

As an organization representing diverse stakeholders, the CEAL and its Advisory Council provide ideal forums for charting new directions in this increasingly diverse landscape of services. Serving as Board Chair for these past two formative years for CEAL has been a real honor, and I look forward to continuing to work to meet the remaining challenges of improving quality and fully realizing the pioneering philosophy of assisted living that is writing a new chapter in the history of long-term care.

Don Redfoot
AARP Public Policy Institute
CEAL’S MISSION

To foster access to high quality assisted living by:

• Creating resources and acting as an objective resource center to facilitate quality improvement in assisted living

• Increasing the availability of research on quality practices in assisted living

• Establishing and maintaining a national clearinghouse of information on assisted living

• Building upon the work of the Assisted Living Workgroup

• Providing resources and technical expertise to facilitate the development and operations of high-quality, affordable assisted living programs to serve low- and moderate-income individuals

GOALS AND OBJECTIVES

To accomplish this, CEAL will:

• Provide reports regarding the state of assisted living quality utilizing objective measures and data

• Develop a means of disseminating quality information about assisted living residences in ways that are useful to various constituents

• Identify and promote areas for assisted living research

• Develop and disseminate:
  – Specific performance measures including measures of quality of life, clinical outcomes, functional outcomes and staff/resident/family satisfaction
  – A compendium of effective practices for use in assisted living operations, regulations and development
  – Practice protocols to address identified problem areas

CEAL BOARD MEMBERS RACHELLE BERNSTECKER (AHSA) AND ROBERT JENKENS (NCB CAPITAL IMPACT)
The Center for Excellence in Assisted Living (CEAL) was created as an outgrowth of a national initiative known as the Assisted Living Workgroup (ALW). The ALW was formed at the request of the U.S. Senate Special Committee on Aging in 2001. Nearly 50 organizations representing a broad range of stakeholders came together over the course of 18 months to develop consensus recommendations to assure quality in assisted living. The 110 recommendations were presented to the Aging Committee at a hearing held in April 2003.

The first ALW recommendation was to form and fund an entity to continue the work of the ALW and to serve as an ongoing information clearinghouse. The recommendation further stipulated that the entity should include a governing board comprised of diverse key stakeholders. Eleven of the key stakeholder organizations involved in the ALW formalized this recommendation to create CEAL. CEAL was incorporated in the District of Columbia in November 2004 and subsequently granted 501(c)(3) status by the IRS.

CEAL is a non-profit collaborative of eleven national organizations. Each organization has one representative that comprises the 11-member volunteer Board of Directors. The organizations represent a unique balance of key stakeholders in assisted living including: four consumer advocacy organizations; four assisted living provider organizations; an organization focused on promoting the availability of affordable assisted living; a national assisted living nurses’ association; and an organization focused on championing quality for aging services.

CEAL promotes high-quality assisted living, serves as a convener to bring together diverse stakeholders to discuss and examine issues related to assisted living as well as to help bridge research, practice and policies that foster quality and affordability, and maintains an objective national clearinghouse of information and resources about assisted living. CEAL's Web site is www.theceal.org.
An important element of CEAL is its expansive Advisory Council. The CEAL Advisory Council was formed in 2005 to regularly bring together the wider assisted living stakeholder community to discuss and examine current topics from diverse perspectives. The volunteer Advisory Council meets four times each year in Washington, DC, and serves a critical role by developing annual recommendations that help to shape and inform CEAL’s goals and objectives.

The CEAL Advisory Council:
- Provides a forum for the diverse perspectives of stakeholders to discuss issues of importance to assure quality assisted living
- Facilitates exchange of information and ideas related to current developments in the field
- Discusses timely policy issues and receives recommendations for the CEAL’s consideration

2007 CEAL ADVISORY COUNCIL PARTICIPANTS

American Academy of Home Care Physicians
American College of Health Care Administration
American Dietetic Association – Gerontological Nutritionists
American Geriatrics Society
American Institute of Architects
American Medical Directors Association
American Society of Consultant Pharmacists
CARF–CCAC
Gerontological Society of America
Hartford Institute for Geriatric Nursing
National Adult Family Care Organization
National Association for the Support of Long Term Care
National Association of Activity Professionals
National Association of Area Agencies on Aging
National Association of Boards of Examiners of LTC Administrators
National Association of Home Care and Hospice
National Association of Professional Geriatric Care Managers
National Association of Social Workers
National Association of State LTC Ombudsmen Programs
National Association of State Units on Aging
National Conference of Gerontological Nurse Practitioners
National Hospice and Palliative Care Organization
National Multiple Sclerosis Society
Supplier Community Representative – Direct Supply
Federal agencies:
DHHS/Agency for Healthcare Research and Quality
DHHS/Centers for Medicare and Medicaid Services
DHHS/Office of the Assistant Secretary for Planning and Evaluation
COLLABORATIVE FORUMS

■ Disclosure Collaborative — CEAL continued its partnership with the U.S. Agency for Healthcare Research and Quality (AHRQ) begun in 2006 to bring together diverse assisted living stakeholders to develop through a consensus process a uniform instrument to describe the services and characteristics of assisted living residences; and pilot test the effectiveness of the instrument for disclosing information to consumers so that they can make more informed decisions.

■ Medication Management in Assisted Living Symposium — CEAL partnered with HealthCom Media, the publishers of Assisted Living Consult magazine, to host a forum to bring together diverse thought leaders from across the country to discuss and examine safety and quality issues of medication management. Top priorities and actionable next steps were identified.

■ Quarterly Advisory Council Meetings — The Council met quarterly in Washington, DC, and via conference call for members outside of the area. Some sample topics of the substantive presentations and discussions include:
  • National residential care survey being conducted as a joint project among the Office of the Assistant Secretary for Planning and Evaluation (USDHHS), National Center for Health Statistics (CDC), and the Agency for Healthcare Research and Quality (USDHHS).
  • Environmental Protection Agency’s study on the Clean Water Act and the management and disposal of unused pharmaceuticals
  • Managing higher acuity residents in assisted living
  • CMS’s 1915(i) Home and Community-Based Services Benefit and 1915 waivers
  • Cornell’s Institute for Translational Research in Aging
  • U.S. Veterans Administration’s supplemental benefit aide and attendant program
RESEARCH

- **CEAL–UNC Collaborative Project** — CEAL and the University of North Carolina at Chapel Hill, Collaborative Studies of Long-Term Care continued work on its community-based participatory research (CBPR) project to study assisted living medication administration of licensed and unlicensed personnel. The project, funded by AHRQ, will be completed in 2008.

INFORMATION AND RESOURCES

- **Web-based National Clearinghouse for Assisted Living Information** — CEAL continued to build and expand its national Clearinghouse of assisted living information. The Clearinghouse is a free national resource for the collection and dissemination of materials relevant to assisted living including research, consumer materials, select state information such as links to state’s regulations and licensing agency contact information, exemplary assisted living practices-measures-policies, and training and educational materials among many other resources.

- **Web Site Columns** — In 2006, CEAL added the column feature to its Web site’s home page to provide thoughtful commentary about timely assisted living topics. The column is authored on a rotating basis among the CEAL board members and occasional guest columnists. The purpose of the column is to provide thoughtful consideration about topics affecting the assisted living industry and consumers.

THE CEAL CLEARINGHOUSE WEB SITE FOUND AT WWW.THECEAL.ORG
Part of the CEAL board member’s commitment to create a unique stakeholder collaborative organization included its willingness to provide significant funding support. Since CEAL was created in 2004, a large part of its budget annually has been from board member organization contributions. In addition to the monetary contributions many of the board organizations provide, each organization also has generously committed staff time and other in-kind resources.

CEAL receives funding for some of its research commitments and self-funds other projects. In 2007 and 2008, CEAL self-funded its partnership with AHRQ in an initiative to create a national uniform consumer disclosure tool developed through consensus with a diversity of assisted living stakeholders.

CEAL’s 2008 projected expenses continue its tradition of maintaining low administrative overhead costs.

If you would like to support CEAL’s efforts by making a tax-deductible donation, please visit the Web site at www.theceal.org and click on the JustGive at the bottom of the home page.
LOOKING AHEAD...
2008 GOALS AND OBJECTIVES

INFORMATION AND RESOURCES
• Continue expansion of Web site content
• Expand resource materials on the CEAL Clearinghouse including a focus on consumer information

COLLABORATIVE FORUMS
• Continue partnership begun in 2006 with AHRQ to oversee the development of a uniform disclosure instrument to describe the services and characteristics of assisted living residences through a national voluntary consensus process with diverse stakeholders
• Host quarterly CEAL Advisory Council meetings
• Host a Webinar on medication management in assisted living
• Identify and begin efforts to support affordable assisted living

OUTREACH
• Continue to widen CEAL’s outreach efforts
• Keep the Senate Special Committee on Aging informed about the work of CEAL
• Support the development and operation of high quality assisted living serving low- and moderate-income individuals through efforts by the newly established Affordability Committee

PUBLIC RELATIONS
• Launch a promotion and education campaign about CEAL and the Clearinghouse

RESEARCH
• Complete work on the CEAL-UNC CBPR Collaborative research project
• Collect (or cause to be collected) appropriate data to begin the consensus development of assisted living performance and quality measures
• Advance and disseminate knowledge through consensus identification of effective practices and practice protocols for identified areas of assisted living (such as medication management, health information technology) and begin work to launch an annual CEAL Effective Practices Award

REVENUE
• Implement revenue-generating campaign
2004  CEAL incorporated as a non-profit organization
Convened a Quality Summit entitled “Achieving Excellence”

2005  Launched CEAL’s Web site — www.theCEAL.org
Formed and began convening quarterly Advisory Council meetings
Hosted a symposium on affordability and published a White Paper
Partnered with UNC-Chapel Hill on a community-based participatory research project

2006  Convened a Quality Summit entitled “Assisted Living: The Next Generation”
Launched national Clearinghouse for the collection and dissemination of resources about all facets of assisted living

2007  Partnered with the US/DHHS Agency for Healthcare Research and Quality on a national consumer disclosure initiative
Partnered with HealthCom Media to host a symposium on medication management in assisted living and a White Paper of the proceedings
Began publishing a CEAL Annual Report

Coming together is a beginning.
Keeping together is progress.
Working together is success.”
— Henry Ford
OFFICERS

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Rachelle Bernstecker, Secretary ........................
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