



Association of Senior Referral  
Professionals of Washington

# Annual Report 2024

December 11th



# The Association of Senior Referral Professionals of Washington 2024 Annual Report

## **Executive Board 2024**

### **President**

Heidi Sheldon, Options For Seniors, LLC

### **President-Elect**

Tibi Botocon, A1 Senior Care Advisors, LLC

### **Past President**

Lauren Ward, Thrive Senior Advisors, Inc.

### **Treasurer**

Abby Durr, Silver Age Advisors

### **Secretary**

Lisa Doyle, CayCare, Inc.

## **Board of Directors 2024**

### **Communications Chair**

Abby Durr, Silver Age Advisors

### **Education Chair Co-Chair**

Lisa Satin, Tailored Advisory Solutions  
Lauren Ward, Thrive Senior Advisors, Inc.

### **Ethics and Best Practices**

Lisa Satin, Tailored Advisory Solutions

### **Legislative Chair**

Heidi Sheldon, Options for Seniors LLC

### **Membership Co-Chairs**

Mary Miller, Aegis Living of Laurelhurst  
Adrienne Miller, Forever Care Services  
Dorina Ilisan, Ideal Care Home Inc.

### **Affiliate Board of Directors**

Mary Miller, Aegis Living of Laurelhurst  
Dorina Ilisan, Ideal Care Home Inc.

## **2024 Members**

- 1<sup>st</sup> Choice Advisory Services
- 1<sup>st</sup> Place Senior Housing
- A Caring Choice Agency
- A1 Senior Care Advisors, LLC
- Alderwood Senior Care Advisory Service
- Always Best Care Senior Services
- BWC Senior Living Placement
- Calm Harbour Placements
- CayCare, Inc
- Concierge Care
- Dedicated Care Solutions
- Forever Care Services, LLC
- Oasis Senior Advisors
- Options For Seniors, LLC
- Pinnacle Senior Placements, LLC
- Revive Senior Solutions
- Sage Senior Network
- Senior Housing Advisory Services
- Silver Age Senior Living Advisors
- Senior Placement Services Care Patrol Seattle
- Tailored Advisory Solutions
- Thrive Senior Advisors Inc.

## **2024 Affiliate Members**

- Ascent Adult Family Home
- A Serenity AFH
- Abundant Life Elderly Care
- Aegis Living Laurelhurst
- Aegis Living Ballard
- Family Resource Home Care
- Forest Cottage AFH
- Grace Lodge LLC
- Ideal Senior Care
- In-Home Senior Care Solutions
- Koelsch Senior Living
- Madison House
- Mariana's Adult Family Home Inc
- Lakemont Senior Living
- Oregon Senior Referral Agency Association
- Redmond Elderly & Golden Age Care
- SMS Nursing
- Sunrise Senior Living
- The Lakeshore ERA
- Transforming Age

## **Mission Statement:**

**Association of Senior Referral Professionals of Washington** is committed to establishing and promoting professional and ethical standards within the senior housing and care referral industry; as well as to those who provide supportive and ancillary services for older and other frail adults within the state of Washington.

A common business interest of all members is to create a unified and consistent voice that promotes, develops, and facilitates:

- 1) Ethical standards that create a quality experience for seniors, frail adults, and the people who support them.
- 2) Recommended best practices and the education of members, with a shared goal of improving consumer awareness of options and increasing the ability of consumers to make informed decisions.
- 3) Education to increase the knowledge and skills of members regarding aging, aging-related products and services, communication, decision-making, and conflict resolution.
- 4) Education to increase consumer awareness of aging, senior housing and care options, effective processes for making life transition decisions, and to improve communication amongst family members, health care professionals, and insurance carriers.
- 5) A means for consumers, senior housing and care providers, health care professionals, other professionals or community members to provide feedback to the entire referral industry.
- 6) The use of referral professionals as a means of making effective use of time, energy, and resources for consumers and senior housing and care providers.
- 7) Transparency, disclosure, accuracy of information, and effective, recommended business practices within the senior housing and care referral industry.
- 8) Consumer protection by communicating residents' rights and current and future RCWs & WACs impacting consumers.
- 9) Collaborative opportunities for consumers and association members to have a voice in future legislation and regulation regarding senior housing and care services.
- 10) Protection of consumers by communicating the option to file complaints to the Ombudsman, The Department of Social & Health Services, Adult Protective Services, The Attorney General, and other regulatory or social service agencies.

# **Message from the President 2024**

*Heidi Sheldon, Options For Seniors, LLC*

## **Message from the President**

As I conclude my sixth term of serving as President of the Association of Senior Referral Professionals of Washington. It has never been more relevant and important for those of us serving seniors in Washington State to belong to this network of professionals. The members enable us to advocate, brainstorm, give back to our communities, meet, network, and socialize with friends and colleagues from all over the great State of Washington.

The changes in our industry, whether social, political, technological, regulatory, economic, or otherwise, require that we help our clients navigate through new and increasingly complex medical landscape in the senior housing and care continuum. Our terrific ASRP WA community of professionals, including all our housing providers, sponsors, and affiliate members, is a network on which I have become increasingly reliant when facing these new challenges and opportunities.

I am proud of our association's success over the last year, particularly in providing more opportunities for meaningful engagement of our members, housing providers, and affiliate members. The programming, speakers, and topics provided professional development and outreach opportunities. In the year ahead, the leadership will continue with these initiatives and add programming intended for the different parts of the continuum, including all housing provider types and affiliate members who serve seniors.

As I come to the end of my term as President, I want to thank the members and leadership for your continued participation and enthusiasm of our professional association, as well as our sponsors for your incredible support and input. Finally, I'd like to give a special shout-out to our incoming President, Tibi Botocan' with A1 Care Advisors, and our associations, Executive Board, and Board of Directors for their tireless work on behalf of ASRP WA. I will forever be grateful for all the resources, guidance, and support they provided me throughout the years. THANK YOU ALL!!

Wishing you a prosperous and successful 2025! I look forward to working with you all as Past President and Legislative Chair this coming year.

# Committee Reports 2024

## Communications

***Abby Durr, Silver Age Advisors***

In 2024, the Communications Committee was available to help facilitate our quarterly meetings. We updated our mailing lists in Constant Contact and now have segmented lists for ASRP members, affiliates, and referral agencies that are not members. We also have a more extensive mailing list for people who support ASRP and like to attend meetings. In 2024, we hosted some fun mixers and happy hours in addition to our quarterly membership meetings. Communications added our new 2024 members to the website and kept the upcoming events current. The up-to-date ASRP brochure is in the works, and we plan to have it ready to print in early 2025.

## Education

***Lisa Satin, Tailored Advisory Solutions***

ASRP Education Chairs work closely with other ASRP committees and include Best Practices to provide the most relevant speakers and topics for our membership. We strive to offer opportunities to help train and educate our members on important topics to our members, affiliate members, and our clients and their wellbeing. Our speakers join our quarterly general membership conferences and are invited to stay for the entire conference. We facilitate social gatherings outside of regular meetings at least twice yearly so our members can get to know each other and share experiences. This chair position also provides our meeting venues and posts the events on Facebook.

Dec 6<sup>th</sup>, 2023, was our Annual meeting for the year 2023. Our guest speaker was Ligia Ognean, RN. Ligia spoke with us about Citations, Deficiencies, and Compliance in licensed care homes as per DSHS and shared a variety of examples. The Chateau Valley Center hosted our 2023 Q4 meeting, which was well attended. We went over our 2023 Annual Report and had a successful transition of board chairs.

Our March 13<sup>th</sup> Membership meeting was hosted at Aegis Ballard. We had a larger than usual attendance and focused on our membership drive as well as education. Adrienne Miller presented our membership drive. Abby Durr reviewed our Code of Ethics from our website. Heidi Sheldon gave us a legislative update and rolled out our "Termination of Referral Agency" letter. Our speaker was Jeffery Youngs from The Center for Medicaid and Medicare, and the presentation was very informative from the national level.

Our May 8<sup>th</sup> Membership meeting was hosted by The Park at Belle Harbour and was also very well attended. Our featured speaker was foot expert Bonnie Ackles, BSN, RN, CFCS, along with her foot nurse colleagues, who discussed the importance of ongoing foot care for elders. We had Tibi Botocan discuss "Touring Tips" and "What not to Do" for AFH providers. Lisa Satin led the discussion of our Elder and Vulnerable Adult Referral Agency Act as well as our ASRP Ethical Standards guidelines.

Our two social events occurred at Aegis Laurelhurst on June 12th and The Watermark on September 11<sup>th</sup>. These are valuable team-building events for the board and our membership.

The Lakeshore Retirement community hosted our October 9th conference. Ligia Ognean, RN, was our speaker on the pertinent topic of Geriatric and psychiatric issues, resources, and problem-solving creativity. She shared a variety of invaluable resources and anecdotes.

December 11<sup>th</sup>, 2024, will be our annual membership meeting at Chateau Renton Center and will include Chandra Lewnau with Wall Group Law, who will speak on Medicaid and updated details regarding the VA Aide & Attendance benefit. We will present our 2024 Annual Report and vote on our new Board members for 2025.

### **Ethics/Best Practices**

#### ***Lisa Satin, Tailored Advisory Solutions***

In 2024, the Ethics and Best Practices Committee was available to fellow ASRP members who had questions about the state guidelines, specifically those questions that pertained to referral agencies in the State of Washington. There were no formal complaints regarding any of our members in the year 2024. We continued to spread the word about our high standards and best practices. In 2025, we look forward to recruiting new Ethics and Best Practices Committee members and having an Ethics and Best Practices Committee meeting.

### **Legislative**

#### ***Heidi Sheldon, Options For Seniors LLC***

#### **Policy Round Up For 2024**

This year, the legislative session was 60 days. This so-called “short” session is the second part of the two-year legislative cycle in Washington. In 2023, the legislature passed the state operating budget for July 1, 2023, through June 30, 2025, in a 105-day “long” session.

#### **Policy Round-Up For 2024**

**HB 1859 – Residents Rights Legislation:** This legislation would have imposed federal nursing home regulations onto community-based settings. We defeated the legislation this year, but we expect it to return. The deal breakers were the 90-day timeline for appealing discharge notices and the lack of resources for focused case management. DSHS did work to draft alternate language, but thanks to your support and collaborative lobbying efforts with the Adult Family Home Council and Leading Age Washington, this bill did not advance out of committee. Nearly 5000 people registered their positions on the bill – 70 percent were opposed to the legislation.

**HB 2114 - Rent Caps Legislation:** This legislation impacts independent residents in mixed AL/AL seniors housing. The bill is very controversial – the Senate version of the bill died, and the House version is now in the Ways and Means Committee, where it has not yet advanced to executive action. The legislation limits rent and fee increases to 7 percent during any 12-month period and prohibits rent and fee increases during the first 12 months of a tenancy for tenants subject to the Residential Landlord-Tenant Act, regardless of the length of their lease, with certain exemptions. The legislation establishes fee increase notice requirements, tenant lease termination provisions, limits on move-in fees, security deposits, and late fees, and requires parity in terms between month-to-month and longer-term rental agreements. There are remedies and enforcement mechanisms under the Consumer Protection Act and through private cause of action.

**SB 5640 – Work Group on Independent Residents Rights in Assisted Living:** The legislation establishes a living residents' rights work group to recommend a bill of rights for nonresidents residing in an assisted living facility. The legislation passed the Senate but did not move to the House; however, the bill is referenced, and funding is provided in the Senate budget, so this could be classified as “Necessary to Implement the Budget” and may still be alive. WHCA is a referenced stakeholder in the work.

### **Income tax**

[Initiative 2111](#) would prohibit Washington State and its local governments from imposing taxes on personal income. In the Senate, 38 lawmakers voted for the initiative, and 11 – all Democrats – voted against it. In the House, it passed 76-21.

“This initiative is designed to do one thing, which is to codify in law the state’s longstanding tradition of not having a tax based on personal income,” Senate Ways and Means Committee Chair June Robinson, D-Everett, said. The proposal will not change any current laws. Washington does not have an income tax, and there are no serious proposals in the Legislature to impose one.

The 2025 legislative session is a 105-day-long session, where a 2-year operating budget must be adopted. The Governor’s Office leads the process and is required to release a proposal in December of each year. The news out of Olympia hasn’t been good in recent weeks—the Governor’s Office of Financial Management is warning of a \$10-12 billion budget deficit going into the 2025-2027 biennium. Immediate state government travel and hiring freezes have been put in effect. According to Pat Sullivan, OFM director, the budget situation is dire. Thus, Governor Inslee's office will develop two budgets for release in December. One budget will contain draconian cuts, and the other will include a tax package to support current spending. We understand that Governor-Elect Ferguson will also release a budget—and the House and Senate will also prepare plans for release in early spring.

The Legislature is in town this week for Legislative Committee Days. This precursor to the 2025 session, which begins on January 13, is intended to help brief legislators on issues of key importance. The House Appropriations Committee will meet at 4 p.m. to review 2025-27 state operating budget development. Here’s the [staff presentation](#).



The writing is on the wall—if we are to avoid rate cuts on senior care and housing, legislators **must** hear from their constituents regarding critically important funding and policy measures, especially during a change in the Governor’s Office and with new leadership in the Legislature.

- **Medicaid Funding for July 1, 2025-June 30, 2027:** We continue to press the urgent need for an annual rebase for skilled nursing facilities, and continued funding of the assisted living Medicaid rates methodology—and it will be a heavy lift in a tough budget time. Due to a one-time rate add-on structure for the first year of the biennium, the impacts of an annual rebase won’t be recognized until the out years, yet if successful, this policy change would go a long way toward systematic repairs to help the system come closer to meeting cost growth. ***This is a time when budget cuts are likely to be proposed, and we must marshal every resource to fight against this threat.***
- **Eliminating Barriers to the LTC Workforce:** The Department of Health cannot keep up with timely testing and certifying of home care aides; the additional FBI fingerprint background checks requirement delays certifying. This year, moving testing to community-based assisted living training programs and eliminating burdensome fingerprint requirements are priorities.
- **Playing Defense Against Troubling Proposals:** We are already hearing about legislation to establish separate certification requirements for providers specializing in delivering dementia care in assisted living—and the fight regarding extending federal nursing home residents rights standards to Washington’s community-based care settings is likely to continue. While these measures may be well-intentioned, we understand the negative impact on providers and will work to represent your interests in these discussions.

It is up to each of us to ensure that our legislators protect funding and care for Washington’s vulnerable citizens who require care. Please take the time this month before the session starts in January to contact your legislators and start a conversation about the need to fund Long Term Care for Seniors in the State of WA.

How to contact your Representatives:

Step 1 - Follow this link: [Washington State Legislature](#)

Step 2 - Verify your legislative district and your address

Step 3 - Your legislator names should show up – click on your senator

Step 4 - Enter your contact information

Step 5 - Enter your bill position and comment

Step 6 - Send your comment

## **Membership**

### ***Mary Miller, Aegis Living Laurelhurst***

The goal of the membership committee was to increase membership this year by ten new members and to help encourage current members to attend. Networking socials were added to the schedule aimed at attracting additional members. A couple of the more successful events included an evening happy hour, and a membership drive breakfast with Glassy Babies as door prizes. These events helped attract new members:

#### **2024 New Referral Agencies are:**

- Nancy Haberman, Calm Harbor Placements
- Raminder Nijar, Revive Senior Solutions
- Jessica Seavers, Sage Senior Network
- Liz Campbell, 1st Choice Advisory Services
- Tonya Hilson, BWC Senior Living Placement

#### **2024 New Affiliate Members are:**

- Meron Negash, Ascent Adult Family Home
- Monica Carp, Abundant Life Elderly Care
- Shannon Sullivan, SMS Nursing
- Cindy Leung, Aegis Living Ballard
- Ina Lungu, Redmond Elderly Care
- Silvana Mot, Forest Cottage AFH
- Jason Kitchel, Koelsch Senior Living

## **Financials for the year**

### ***Abby Durr, Silver Age Senior Living Advisors***

In 2024, ASRP generated funds through membership dues. Membership dues are \$200 per year for a referral company, and affiliate membership dues are \$100 per year. Affiliate members offer supportive services and products to the senior housing and care industry and are non-voting members of ASRP. Our fiscal year is January 1 - December 31. Our bank balance on Jan. 1, 2024, was \$7,173.43. As of Nov 26th, 2024, membership dues have generated \$3,426.85, and we anticipate another couple hundred to come in before the end of the year. Operating expenses were as follows:

- Event Giveaway Glassy Babies: 661.50 (April 2024)
- Website Hosting Bluehost: \$248.03 (May 2024)
- Printing
  - VistaPrint for brochures: \$ 330.33 (March 2024 and June 4)
  - FedEx Office: 313.55 (March 2024)
- WHCA Membership: \$600.00 (Jan 2024)
- Association Insurance:
  - D&O/EPL policy with Great American Insurance Company: 933.00 (Dec 2024)
  - Liberty Mutual- General Liability & Crime: 285.00 (Dec 2024)
- Secretary of State Filing: \$20.00 (Sept 2024)
- PayPal Transaction Fees: \$73.15

The current bank balance is \$7,372.39 (12/19/24) and is the only asset of the Association of Senior Referral Professionals of Washington.

## **Past Presidents of ASRP WA**

- Heidi Sheldon, Options for Seniors LLC 2010
- Heidi Sheldon, Options For Seniors LLC 2011
  - (WA regulated in 2011)
- Heidi Sheldon, Options for Seniors LLC 2012
- Heidi Sheldon, Options for Seniors LLC 2013
- Stan McKenzie, A Change is Afoot 2014
- Abby Durr, Silver Age Advisors 2015
- Lisa Doyle, CayCare Inc. 2016
- Heidi Sheldon, Options for Seniors LLC 2017
- David Lepsig, CarePatrol Seattle Eastside 2018
- David Lepsig, CarePartol Seattle Eastside 2019
- Lauren Ward, Thrive Senior Advisors 2020
- Lauren Ward, Thrive Senior Advisors 2021
- Alice Wilkinson, Oasis Senior Advisors 2022
- Lauren Ward, Thrive Senior Advisors 2023
- Heidi Sheldon, Options for Seniors LLC 2024

The logo for ASRP (Association of Senior Referral Professionals of Washington) features the letters 'ASRP' in a bold, dark blue, sans-serif font. The letter 'A' is stylized with a small green dot at its base.

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