

BJ Spitler: Geriatric Care Management Pioneer

Janice Frates, PhD, MSW, LCSW

ABSTRACT. The late BJ Curry Spitler pioneered a new geriatric care management business model that combined care management with home health services and emphasized high levels of training and professionalism for all members of the caregiving team. After working with BJ to write a marketing plan emphasizing quality, I learned to appreciate what she did when my mother needed "assisted living at home" services from the firm. Thanks to BJ Curry Spitler and her vision of helping seniors age in place, more elders are able to remain independent in their own homes with dignity and safety, and peace of mind for their families. doi:10.1300/J083v50n3_10 [Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <<http://www.HaworthPress.com>> © 2008 by The Haworth Press. All rights reserved.]

KEYWORDS. Geriatric care management, biography, assisted living, private practice, home health, eldercare, quality, organizational culture, for-profit, marketing

INTRODUCTION

BJ Curry Spitler passed away in March 2004 at age 79. She was a remarkable woman, and I was privileged to know and work with her in

Janice Frates is Associate Professor, Health Care Administration Program, California State University Long Beach, 1250 Bellflower Boulevard, Long Beach, CA 90840 (E-mail: jfrates@csulb.edu).

Journal of Gerontological Social Work, Vol. 50(3/4) 2008

Available online at <http://jgs.w.haworthpress.com>

© 2008 by The Haworth Press. All rights reserved.

doi:10.1300/J083v50n3_10

a variety of relationships—as a colleague, consultant and client. In each of these relationships, I gained a new appreciation for my former profession of social work and a deeper understanding of the contribution that social work education and values can make to a private business venture. BJ's work and her spirit are a continuing inspiration for social workers in today's turbulent professional environment.

Information for this article was drawn from my personal memories and from materials and information provided by Laura Spittler Hansen, BJ's daughter and business partner for 13 years. Laura's experience working with her mother and the evolution of Age Concerns from a small private geriatric care management firm to a multimillion dollar corporation provide valuable insights on the challenges of leadership in a human services business.

CAREER HIGHLIGHTS

Born and raised in Arizona, BJ received her bachelor's degree from the University of Arizona, and worked as an office manager and administrator for a dental office and a contractor during her early career years. After marriage, moving to San Diego, and the birth of her children, she began working in the nonprofit sector as an administrator and program manager for the Family Service Agency and the Economic Opportunity Center.

BJ was a passionate advocate for the elderly, and an early mover and shaker in both public and private program development for the aging. In the 1970s, she led the development of a feasibility study and area plan for the San Diego County Office of Senior Citizen Affairs to become an Area Agency on Aging, and served as the agency's first director. One of her key accomplishments in that position was to secure funding for and implement a Nursing Home Ombudsman program which became a model for California's current Long-Term Care Ombudsman program. From 1974 to 1976 she served as southern regional manager for the California Office of Aging, with oversight responsibility for 11 counties.

These experiences inspired BJ to pursue graduate study in social work, and she obtained her MSW degree from San Diego State University (SDSU) in 1976 and a PhD in gerontology and public policy from the University of Southern California (USC) in 1979. She served as a gerontology lecturer and an assistant professor of gerontology at USC during her doctoral studies, then taught for ten years at the SDSU School of Social Work. At SDSU, she specialized in aging practice and

policy as well as supervising and mentoring many student interns with an interest in these areas.

AGE CONCERNS: GENESIS AND EARLY EVOLUTION

Concurrent with teaching at SDSU, BJ operated a home-based private practice offering counseling and consulting services focused on enabling seniors to remain independent in the community with a menu of "assisted living at home" services. It began when a psychiatrist asked her to arrange for and coordinate the delivery of in-home caregiving services to a frail and confused older patient—and, unlike the home health agencies and other social services agencies he had contacted—to continue to carefully monitor the services and adapt the care plan as the client's needs changed. In 1982, BJ incorporated her practice as a business, Age Concerns, Inc. Frustrated by the inconsistent quality of caretakers provided by San Diego County home care agencies, she expanded Age Concerns' lines of business from the provision of social work geriatric care management services using a brokerage model to include employment of in-home caregivers.

I met BJ in 1985, when I returned to San Diego after completing my doctorate at USC in health services administration. Dr. Monika White, BJ's roommate and fellow doctoral student in gerontology and social work at USC (who currently heads the Center for Healthy Aging in Santa Monica, California), correctly intuited that we would enjoy getting to know each other. BJ and I discovered a shared passion for promoting elders' independence and innovative community service programs and, as older PhDs, a love for teaching coupled with a common distaste for academic administration.

I was impressed and inspired by BJ's vision for a new type of geriatric care management agency—and, as a social worker for many years myself, bemused but not surprised by the controversy that it caused within the practitioner community because it broke with tradition. Age Concerns' business model was distinctive because it combined social work and home care, employing both highly skilled, master's prepared social workers with specific training and expertise working with the elderly and in-home caregivers. Some in the field considered this a conflict of interest or an inappropriate combination of "professional" and "paraprofessional" services.

BJ was annoyed but not influenced by these critics, for she was guided by a broader vision of quality as Age Concerns' most distinctive characteristic. Her commitment, and Age Concerns' purpose as a business, was to provide expert geriatric care management and skilled, kindly, responsible, and trustworthy in-home caregiving to a highly vulnerable frail elderly clientele. Unable to obtain skilled caregivers who met her standards from extant local home health agencies or nursing registries, BJ recognized that the only way she could ensure the availability and quality of caregiving services would be to recruit, train and employ them herself—even though that would make her business much more complex.

AGE CONCERNS: CORPORATE DEVELOPMENT

By 1989, Age Concerns had grown its client base to over 40 and its annual revenue base to over \$600,000. BJ had retired from teaching and was devoting full time to the business. Age Concerns also employed a part-time office manager/bookkeeper and a part-time social worker in addition to about 25 full- and part-time caregivers. BJ was ready to take the business to the next level, and, at 64, was also thinking ahead to plan her gradual retirement. I had observed Age Concerns' growth and provided some informal business advice to BJ since getting to know her, and was delighted when she asked me to develop a formal marketing plan for Age Concerns.

Working with BJ to develop the marketing plan was an exciting, fun, challenging and sometimes contentious experience. We agreed early-on to position the firm as "the Nordstrom's of geriatric care management agencies." That meant going above and beyond what was expected to provide exceptional service, and an insistence on the highest standards of care from all who served the client on behalf of the company. Because nearly all clients in need of geriatric care management services were referred by community professionals (most commonly physicians, attorneys, and financial advisors), we also agreed that Age Concerns would grow principally by nurturing and expanding its referral source base.

Our areas of disagreement were about tactics and logistics rather than vision and strategy. BJ and her office manager were reluctant to invest the time it would take to develop a referral source data base from the lists of referral agents the agency maintained, and to ask current referral sources to suggest colleagues who might benefit from learning about

Age Concerns. We also had a series of sometimes heated discussions about providing health insurance for Age Concerns employees. BJ knew that in order to attract and retain a stable group of well-qualified caregivers she had to offer them a better employment deal than they could obtain working for another organization. It was her practice to pay her staff 15-20% above market wages, but she resisted my recommendation that she also provide health insurance. At that time, insurance premiums were increasing by double digits each year, and small businesses in California enjoyed none of the insurance reform options that they do today. BJ did recognize the importance of this benefit to her employees, and began to provide health insurance in 1992—a practice that is unfortunately still the exception for home health and eldercare management firms, and most small businesses.

Like individuals, organizations have certain developmental milestones. Moving from BJ's home office to a "real office" near downtown San Diego was a big step that took place in 1990. Three years later, the company had outgrown this space and moved to larger quarters. But perhaps the most significant decision BJ made was to hire her daughter, Laura Spitzer Hansen, to help create an organizational culture that supported her original vision of quality service to clients.

Laura began her employment with Age Concerns in 1990, with some trepidation about working for her mother. Both BJ and Laura were strong personalities, and while they had always gotten along well, they were extremely independent and involved in their work. Laura's training and experience was in human resources management, with an emphasis on organizational development and training. She was attracted by the opportunity to do in an organization what she had been teaching and recommending as a consultant. "I wanted to create for myself and for others a company where people could be authentic and where they could be an integral part of the company's success."

BJ knew that the way employees are treated affects how they treat clients, but her management style was more maternal, and she was not always able to set appropriate boundaries for staff. Laura was comfortable with and skilled in establishing standards of performance accountability for employees in a variety of positions; BJ respected her expertise in human resource management, and knew it was an important element of the firm's ability to deliver high quality service. To enhance her understanding of her mother's profession and the company's orientation, Laura obtained a master's degree in social work in 1994 from San Diego State University.

Laura recalled the 1990s and the early 2000s, when Age Concerns was growing rapidly, as "kind of a Camelot period." Her experience as an organizational development consultant guided changes in Age Concerns' structure as the company grew, and she found tremendous satisfaction facilitating the growth and development of Age Concerns' employees. During this decade of rapid expansion, the organizational structure expanded and became more advanced. The firm now has a Chief Financial Officer, Director of Operations, Human Resources Director, and a Director of Clinical Services. While turnover in most home care agencies averages 98% a year, Age Concerns' rate was 27% for caregiving staff and 7% for professional staff. Four of BJ's former social work students became geriatric care managers, as well.

As Age Concerns grew, the company also adopted more formal measures of performance by regularly surveying both clients and family members to ascertain their satisfaction with agency services. New clients received a survey six months after service initiation, and annually thereafter. Social workers regularly asked all clients (in private) about their satisfaction with their caregivers. These results were shared with staff and used to develop individual and organizational performance improvement initiatives.

While BJ and Laura did not agree on everything, the mother-daughter partnership was both satisfying and productive. The most satisfying aspect was to know that their combined visions of service quality and a positive corporate culture could work, and was a sustainable model for business growth. Although no longer an active academic, BJ continued speaking and writing on geriatric care management. Laura and BJ co-authored a chapter for the *Handbook of Geriatric Care Management* (2001), which has become the seminal text in the field.

THE SALE OF AGE CONCERNS

In the late 1990s, BJ was in her 70s and began to plan more seriously for retirement. She formed a board of advisors to help think about the company's future. Stepping down from day-to-day operations, she became chairman of the company and named Laura Chief Executive Officer. In about 2000, LivHome, a Los Angeles-based company that now also has operations in Arizona and Minnesota, approached Age Concerns about purchasing the company. BJ, Laura and the board of advisors decided against a sale at that time. Instead, they planned to continue building the company for the next five years, and then consider selling it.

The following year, SCAN Health Plan, a social/health maintenance organization based in Long Beach, California, offered Age Concerns a very attractive opportunity to create a national company based on the Age Concerns model through its "Porchlight" subsidiary. Age Concerns accepted this offer and began planning for a national expansion. However, just nine months after Porchlight purchased Age Concerns SCAN experienced financial difficulties and a change of leadership. State health plan regulators insisted that it sell Age Concerns as part of a broader reorganization and retrenchment directive. Legal and financial advisors for Age Concerns and SCAN advised that the best option was to sell Age Concerns to LivHome. At that time the company had annual revenues of about \$9 million, a client base of about 200, and employed approximately 350 full-time equivalent staff.

The acquisition of Age Concerns in May 2003 made LivHome the largest geriatric care management company in southern California and stimulated additional expansion fueled by private equity venture capital (LivHome, 2003). However, both BJ and Laura decided to limit their involvement with the company after the sale to that of advisors for a brief period following the acquisition. BJ wanted to devote her time to community service and to travel more, while Laura was interested in pursuing executive coaching, teaching and writing opportunities. Both BJ and Laura also felt that the new owners and managers were likely to make some changes in the way the company operated, as their purchase would entitle them to do. Mindful of the maxim to either "lead, follow, or get out of the way" (Paine, 1776), they recognized that as former owners, they could no longer lead the company, and neither be a follower; so it was best to move on.

BJ became even more involved as a community volunteer after her official retirement. As chair of the City of San Diego's Senior Citizens Advisory Board she spearheaded the process of obtaining city funding for a transitional housing program for homeless seniors. She continued her involvement as an advisor to several senior programs in San Diego, and one, Senior Community Centers, named her its "Senior Advocate of the Year" for her efforts to promote more affordable housing for limited income seniors in 2002.

BJ also indulged her longstanding love of travel, and was on a Far Eastern cruise bound for Africa when she suffered a heart attack in Burma. "Literally and up to the last moments, she was enjoying herself and full of life," remarked Laura.

BJ CURRY SPITLER'S LEGACY

BJ Curry Spitler foresaw the graying of America, and the business opportunities that it offered. But she took issue with the prevailing assumption that retirement communities, nursing homes and assisted living facilities were the wave of the future. Recognizing that many seniors preferred to age in place, she developed a new model of "assisted living at home" services, and implemented an entrepreneurial vision that incorporated the highest standards of social work practice.

A founding member of the National Association of Geriatric Care Managers and its California chapter, BJ worked during the association's early years to develop membership standards and define professional standards and a certification process. In later years she was instrumental in establishing the association's code of ethics. The association honored her in 2000 with the Adele Elkind Award for distinguished and professional services and by establishing the BJ Curry Spitler Memorial Lecture at the annual national conference. The first, in 2004, featured elder law attorney Peter Strauss speaking on professionalism and ethics. The Western chapter of the association has also established the BJ Curry Spitler Award at its annual conference for a geriatric care manager demonstrating outstanding community involvement.

Personally, I remember and respect BJ Curry Spitler for putting into practice her professional values and entrepreneurial vision, and for the difference that made in my own life. While developing the Age Concerns expansion and marketing plan, BJ and I often discussed her vision of quality geriatric care management and caregiving—not as an abstract concept or professional mantra, but in terms of the kind of care and service we would want for ourselves or our own elderly relatives.

It wasn't long after writing the marketing plan before I put Age Concerns to "the mother test." In 1991, my 76-year-old mother developed pneumonia and came to my home to recuperate after a 16-day hospitalization. She was not only weak, but emaciated, having rapidly dropped over 20 pounds from her already slim frame. At that time I was an executive for a managed care plan with a heavy travel schedule. Over my mother's vehement objections ("I do NOT need a babysitter! This is insulting!"), I hired Age Concerns to provide a daytime caregiver. I don't remember that lovely woman's name, only that she soon won my mother's trust and affection with her kind manner and wonderful cooking. Ten years later, when my mother was diagnosed with Alzheimer's disease at age 86, I turned to Age Concerns again and she received excellent full-time care at home from the agency for two years until her death.

It was during this difficult period that I really came to appreciate what BJ's vision of a quality geriatric care management agency meant, as a client of her business.

"I never met an older person who looked forward to going to a nursing home in their old age, did you?" BJ once asked me—and I never have either. Thanks to BJ Curry Spitler and her vision of helping seniors age in place, more elders are able to remain independent in their own homes with dignity and safety, and peace of mind for their families.

REFERENCES

- LiVHome. (2003). LiVHOME, Inc. @ Closes \$5.85 Million Extension To Series B Round. Retrieved January 7, 2005 from http://www.livhome.com/news/news_pressreleases.html.
- Paine, Thomas (1776). The American Crisis, No. 1. Retrieved March 3, 2006 from http://www.greatdreams.com/political/thomas_paine.htm.
- Spitler, B.J Curry and Hansen, Laura Spitler. (2001). After the Start-Up: Issues for Care Management Organizations. In C. Cress (Ed.), *Handbook of Geriatric Care Management* (Chapter 4). Gaithersburg, MD: Aspen.

doi:10.1300/J083v50n3_10

RECEIVED: 10/13/05
REVISED: 03/07/06
ACCEPTED: 04/06/06