

## Spotlight on Your Colleagues



*Chuck Valerio  
Risk Manager*

This issue of Top Drawer introduces a new feature, "Spotlight on Your Colleagues," a column about risk managers at Member organizations. This inaugural column introduces Charles ("Chuck") J. Valerio, Director of Risk Management at Mather LifeWays, a unique, not-for-profit organization headquartered in Evanston, Illinois, with operations in Illinois and Arizona.

Founded by Alonzo Mather in 1941, Mather Lifeways is dedicated to fulfilling its mission of creating Ways to Age Well SM. During 2008, the organization served more than 32,000 older adults, the most in its history, through its three areas of service: Community Initiatives featuring food, programs and community resources for seniors; Mather LifeWays Institute on Aging, a nationally recognized research and education institute for healthcare professionals who interact with older adults; and Mather LifeWays' four senior living residences.

Chuck Valerio, at Mather LifeWays for nearly seven years, reports to the CFO and is responsible for (1) business insurance and claims; (2) safety of employees, residents and visitors; and (3) business contracts.

Valerio says three factors have contributed to the organization's successful risk management program: support from top management, broad participation in risk management activities and dedicated resources.

He defines a successful risk management program as one in which the risk manager can spend 70% to 90% of his time on "preventive activities" (such as training and program development), rather than on "reactive efforts" (such as claim and incident management). By that definition, Mather LifeWays' risk management program has exceeded the criteria for success, since Valerio estimates he spends 10% of his time on claim activities and the remainder on prevention.

In 2002, when Mary Leary arrived as Mather LifeWays' Chief Executive Officer and President, she made a commitment to play a leading role in developing a culture that makes safety and risk management a top priority. Valerio notes that Leary and the other executive team members "are often involved in promoting the different programs we try to emphasize" in risk management. Executive staff actively participates in the monthly meetings of the 15-member Corporate Safety & Risk Management Committee ("Risk Comm") which reviews a fixed risk agenda as well as recent events and lessons learned from those events. If any executive is unable to attend the meeting, a substitute with similar responsibilities and organization knowledge attends.

In addition to these monthly Risk Comm meetings, Valerio meets regularly with his boss and with Leary to discuss other risk management issues, such as insurance renewals, potential litigation and budget expenditures above specified amounts.

Along with executive support, Valerio attributes broad staff support for his program's success. For example, he prepares a safety training module each month with a goal of 85% employee participation. Topics have addressed hand hygiene, wandering and elopement, emergency preparedness, incident and accident investigation, fire safety, violence in the workplace, back injury and prevention and an alcohol and drug-free workplace. The HR Department tracks participation and reports 85% monthly attendance since the modules were started nearly four years ago.

In addition to the training modules, Valerio engages staff in fun activities. For example, he prepares a "what's-wrong-with this photo" that depicts mock safety hazards and features an employee who has volunteered for the photo. Employees are asked to circle the hazards in the picture and submit it to receive credit for having completed the safety topic.

In addition to his full-time role in Risk Management, the other component for the risk management program's success is having dedicated resources like campus risk managers who have other primary duties. "It's unusual," says Valerio. "Not every continuing care organization has the size and financial resources" for a full-time risk manager, but "we think it's a benefit" to have a risk manager who can "keep an eye out for the topics we should be looking at and analyzing." Valerio also shares, with his CFO, an administrative assistant who assists with the department's efforts.

To help the risk management department implement its activities throughout the community, Mather LifeWays uses task forces staffed by representatives from the organization to oversee special projects, some of which follow Caring Communities' Best Practice Toolkits. Among the risk management topics addressed by the task forces are falls, meeting resident expectations, wandering and elopement, disaster planning, resident handling and material handling. The task forces report on their progress at the monthly Risk Comm meetings. "The task forces

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have been really helpful in trying to develop programs and suggestions, and they keep fresh ideas going," says Valerio.

Valerio adds that networking with other risk managers in the Caring Communities program "has made the best practices come alive. It's a lot easier to find out about best practices [from others] without having to discover them through your own trial and errors."

His advice to other risk managers in the Caring Communities program? "Make safety something that people (in your organization) can enjoy ... If people have a reason to celebrate the good things they do, they will remember to take time to focus on safety and risk management. It will be a part of what they do everyday."

As Mather LifeWays considers expanding, Valerio foresees risk management will be integral to the expansion planning. "Risk management is becoming more and more of a planned-for activity. It becomes part of the budgeting and staffing . . . We are becoming more proactive in developing safety-conscious activities from the very beginning of our communities."

Each location has a risk management designee, although the process is evolving as Mather LifeWays moves from stand-alone locations to continuing care retirement communities. In the past, the location's executive director often served as the risk management designee. Moving forward, the organization is experimenting with designating an operational manager, who reports to the location's executive director, to be in charge

of the location's safety committee. Both the executive director and the operational manager will be responsible for risk management activities.

Valerio typically meets with residents at Mather LifeWays when he participates in safety inspections at the various locations. He introduces himself as "Chuck, the risk guy" and tells residents, "I work with your communities on safety." The residents are receptive to him and "ask interesting questions, sometimes beyond safety." Oftentimes, says Valerio, "they just want to talk about their lives, and it's always fun to hear that."

Valerio has also given presentations to residents on trips he and his wife have taken to places like France, Germany, Italy and Spain. His wife is a travel executive, and they take their trips with college friends, as a group of seven couples. The group is already planning its trip for 2011 to Slovenia and Croatia. As graduates of the University of Illinois, Valerio and his wife also travel locally -- to at least one of the University's football and basketball games.

At home, Valerio takes pride in his "four-legged child," a 14-year-old West Highland white terrier, who is "aging well, along with my wife and me."

