

# Relocation Success

## Nursing home residents get VIP treatment from right of way project team



BY KATHY WALKER

**The project had all the elements for a potential high profile disaster: a major metropolitan interchange to be built at a busy intersection of two interstate highways, coupled with the relocation of 99 residents of a nursing care facility.**

The task at hand involved the total relocation of Amberwood Nursing Center, a fully operational licensed nursing care facility in Oklahoma City. Physically and mentally disabled residents, as well as the fragile elderly, were frightened and uncertain about their futures, and of course, so were their families. Everyone involved knew that one negative action could activate the dreaded media machine and screaming headlines. Lurking in the shadows was the ever present potential villain – the lawsuit.

The nursing care facility project, an expansion of the interchange of Interstates 235 and 44 in Oklahoma City, definitely required a seasoned team. The involvement of numerous state agencies was

required, as well as private contractors, and all had to be aware of, and comply with, stringent federal guidelines. Furthermore, confidentiality and the Health Insurance Portability and Accountability Act (HIPAA) regulations complicated the vital identification process.

### The Team

Kurt Harms, Right of Way Chief for the Oklahoma Department of Transportation (ODOT), selected Coates Field Service to handle the relocation. “We selected Coates because of their expertise and track record on large-scale relocation projects, such as the massive relocation of 97 businesses and 37 residential occupants for the Interstate 40 realignment in downtown Oklahoma City,” said Kurt.

The team assembled to handle this project was comprised of Coates Project Manager Karen Munde and Relocation Specialist Margie Groves, who were assisted by Document Administrator/Relocation Agent Heather Polasek, Relocation Agents Dan Roberts and Karen Mustard and Document Specialist Kat Metheny.

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## Viable Moving Options

The first major step was to research the local real estate market to determine if any nursing centers were for sale. An independent health care professional was hired to inspect and evaluate each available nursing center within a 25-mile radius. A comparable book was prepared, which included descriptions of more than 30 nursing homes along with photos, services offered, payment types accepted, etc.

Karen and Margie met with the owners of Amberwood to explain the appraisal, relocation and acquisition procedures and how the process would unfold. Everyone agreed that resident care was the top priority. The owners were concerned about how much control they would have in assuring that each resident was relocated to the proper place. Karen and Margie quickly realized that there were going to be many pieces to juggle in solving this puzzle.

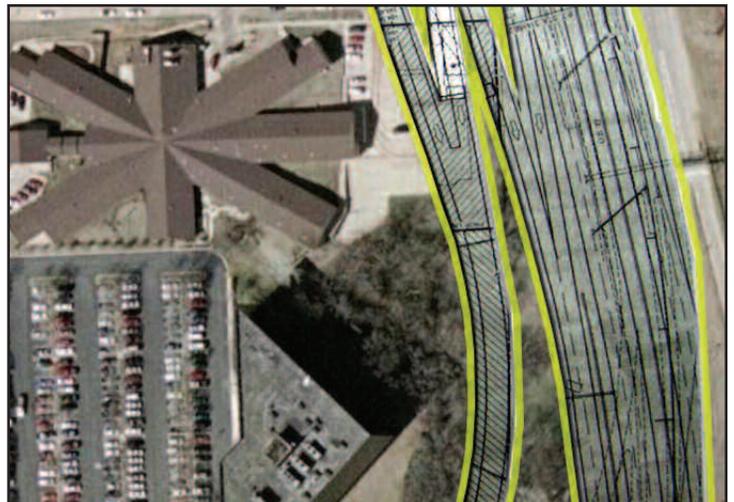
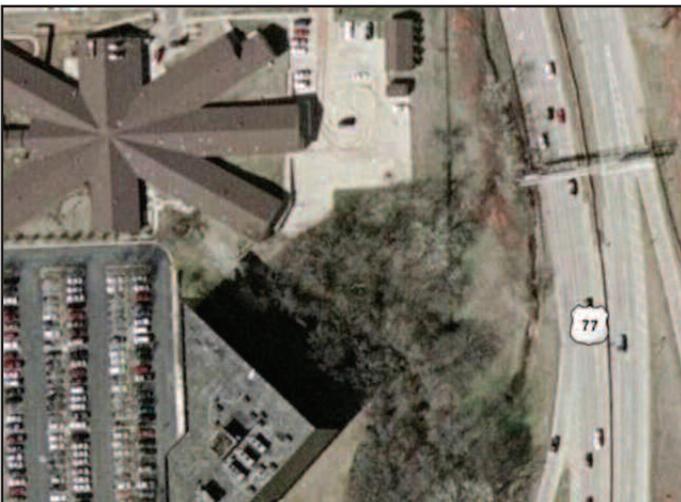
## Rules and Regulations

Of primary interest was evaluating each resident and discerning exactly what their needs were. This was the first step in determining what type of replacement residence would be required for each person. However, due to the Health Insurance Portability and Accountability Act (HIPAA) regulations, information on the residents (name, physical and mental health condition, level of care required, payment source, responsible party) would not be available until the resident or responsible party had signed a release. This would take time, which of course was at a premium.

In the interim, Karen and Margie contacted the Oklahoma State Health Department, Department of Human Services, Adult Protective Services, Medicare/Medicaid, Veterans Affairs and ancillary services to get the process started. “We were frustrated about getting the information about residents. So, we developed files and assigned numbers to each resident and began to gather general information until we could get the HIPAA releases signed,” explained Karen.

Another concern involved transportation. Regulations require the agent to offer transportation to the resident to facilitate their search for a replacement residence. However, due to potential liability in transporting the infirm and elderly, Coates determined that a professional transportation company would be the best solution. This step necessitated more time, more paperwork, more orchestration, plus the continued veil of confidentiality had to be kept in place.

There seemed to be no doubt that word of the move would eventually be leaked, which presented problems with staff retention and keeping Amberwood in business until relocations could be completed. To assist in this dilemma, ODOT developed a retention plan that paid bonuses to keep sufficient staff available. The continued care of the



Oklahoma City intersection before major metropolitan interchange project.

Interchange of Interstates 235 and 44 following expansion project.

# “Everyone involved knew that one negative action could activate the dreaded media machine...”

residents was paramount. Coates recommended, and ODOT concurred, that ODOT should pay protective rent to Amberwood to help with day-to-day expenses as the residents began to vacate the premises.

## Pulling it All Together

The time arrived to formally announce the move. Coates and the agencies met to develop an agenda for a meeting to be attended by the residents, their families and others in a public forum. A key component of the plan was to send the vital HIPAA release with the meeting notice. Karen knew that Coates would still have to meet with each resident to collect information and to assist them in deciding where to go.

A nursing center fair was held at Amberwood, attended by representatives of numerous local nursing centers so they could visit with the residents and their families in person, on-site, to discuss what they could offer. Also in attendance were agencies that were responsible for payment, such as the Veterans Affairs and Medicare/Medicaid.

Among the unique challenges: residents had very little personal property and could potentially move before the relocation team could meet with them. Numerous replacement facilities were competing to recruit the residents, which created apprehension among the residents. Some feared that if they didn't move quickly, the better places would be taken. However, the relocations were completed ahead of schedule and the residents all found suitable new homes within 60 days.

“The relocation couldn't have gone any smoother for the residents,” said Kurt. “It happened in record time and without any negative media inquiries. This speaks volumes about the professionalism of Coates Field Service and how they approached this situation.”



From left, Karen J. Munde, Coates Vice President/Project Manager; Kurt Harms, Right of Way Division Chief, Oklahoma Department of Transportation; Margie Groves, Coates Relocation Specialist; and Dan Roberts, Coates Right of Way Agent/Video Producer.

Karen Munde's take on the complex project is deceptively simple: “Every day is different and every day you learn something new.” So, instead of being apprehensive, defensive or confrontational, the team approached the project as an opportunity to learn, mediate, communicate and, most importantly, assist some people who really needed all the help they could get. Karen also credits the project's success to the numerous IRWA courses they had taken on relocation and acquisition. This project gave the team the opportunity to put into practice what they had learned in the classroom.

## Sharing Best Practices

Given the project's success, ODOT decided to create a training video, outlining the project from start to finish. Coates offered their assistance, and Agent Dan Roberts was able to use his talents from a previous career to produce and narrate the video. Creating the DVD enabled ODOT to share the lessons learned from this multi-faceted project while acknowledging the hard work and efforts of the project team. ●