

Gift Fund Proposed Changes

April 8, 2024

Gift Fund Evolution – Independent Community

- Gift Fund, originally called the Gratuities Fund, was started due to OceanView's no-tipping policy
- Began with recognition of dining staff only and wait staff received 3 times more of that collected than kitchen staff
 - June 2021 – wait staff received \$1.42 per hour worked
 - December 2021 – wait staff received \$2.23 per hour worked ... 57% increase
 - June 2022 – wait staffed received \$1.59 per hour worked ... 28.7% decrease
 - Kitchen staff, during all three of these distributions, received a flat amount with full-time kitchen staff receiving twice that of part-time kitchen staff
- Addition of housekeeping, fitness, transportation, and maintenance occurred in December 2022 with dining staff receiving \$1.20 per hour worked and the remaining included staff receiving \$1.00 per hour worked
 - Split-payment approach with wait staff receiving a 24.5% decrease

Gift Fund Evolution – Independent Community (cont.)

- Definition of hourly, resident-facing employee was introduced in Feb or Mar of 2023
 - Hourly, resident-facing → Hourly staff whose day to day work responsibilities constitute direct service to residentsresulting in the addition of activities, admin, operations, and pro services for the June 2023 distribution
- June 2023 all hourly, resident-facing employees in the following departments
 - Dining, Housekeeping*, Fitness*, Transportation*, Maintenance*
 - Activities, Admin, Operations, Pro servicesreceived 78.8 cents per hour worked ... wait staff received a 34.3% decrease (others [*]received a 21.2% decrease)
- December 2023 no additional departments were added and all hourly, resident-facing employees in the above departments received 74.8 cents per hour worked ... all hourly, resident-facing employees received a 5.1% decrease
- Each evolution was done in the spirit of fairness and equality

Retirement Community – Why OceanView

- When moving here, Susan and I did so for the **overall community** and the **continuum of care** – how many of you selected OceanView for the same reason?
- Statistically:
 - FH has 48 residents with 52% starting out at OV /CC
 - LMC has 29 residents with 51% starting out at OV / CC
- Monthly fees at FH and LMC may be prohibitive for individuals to contribute to the gift fund
 - FH monthly fee is approximately \$9,900
 - LMC monthly fee is approximately \$12,080

Concern

- Hourly, resident-facing caregivers at Falmouth House and Legacy Memory Care are not receiving gifts at the same rate per hour as the other hourly, resident-facing employees working at these two locations.
- CAREGIVERS are the truest resident-facing employees there are.
- Currently all non-caregiver, hourly, resident-facing employees are included within the independent community gift program, receiving a much higher gift rate per hour worked than hourly, resident-facing caregivers. Specifically, from the December 2023 distribution:
 - Dining, housekeeping, etc. – received 74.8 cents per hour worked
 - Falmouth House – caregivers received 30.5 cents per hour worked
 - Legacy Memory Care – because the amount donated for gifts to Legacy Memory Care caregivers amounted to only 6.9 cents per hour, they were given a pizza party instead of actual cash
- This discrepancy causes contention among the employees because caregivers are working side by side with others receiving the higher gift rate per hour.

Last Gift Solicitation / Distribution – Nov / Dec 2023

- Three gift solicitations – OV / CC, Falmouth House, Legacy Memory Care
 1. OV / CC ... dining, housekeeping, fitness, transportation, maintenance, activities, front desk, operations, pro services
 - 75% resident response rate with an average of \$200.91 per donation (310 solicited with 233 donations)
 - 106 hourly recipients (60.1 FTE)
 - Average gift was \$441.61 [Min = \$9 ... Max = \$865]
 2. Falmouth House ... caregivers
 - 52% response rate with an average of \$213.00 per donation (48 solicited with 25 donations)
 - 28 recipients (16.8 FTE)
 - Average gift was \$190.29 [Min = \$11 ... Max = \$368]
 3. Legacy Memory Care ... caregivers
 - 6.9% response rate with an average of \$625.00 per donation (29 solicited with 2 donations)
 - 30 recipients (17.5 FTE)
 - Average gift would have been \$41.67 [Min = \$1 ... Max = \$96]

Impact

- If all three solicitations / distributions had been combined in Nov / Dec 2023, the non-caregiver, hourly, resident-facing employees would have received an average gift of \$318.66 which is 27.8% less than the \$441.61 which was received.
 - This 27.8% decrease is in line with the decrease the wait staff have received throughout the gift fund evolution:
 - June 2022 ... 28.7% decrease (solicitation was less lucrative)
 - December 2022 ... 24.5% decrease (added housekeeping, fitness, transportation, and maintenance)
 - June 2023 ... 34.3% decrease (added activities, admin, operations, pro services)
 - December 2023 ... 5.1% decrease (no departments were added)
- If the goal is to keep the non-caregiver, hourly, resident-facing employees' gifts the same, and there was no change in the amount solicited at FH and LMC, then the OV/CC average contribution would need to be increased by 43% or \$286.27 instead of the \$200.91 which was given.

Gift Fund Evolution – Entire Community

- March 11 – community-wide solicitation and distribution was presented at OV Community Council meeting
 - Topic resulted in lots of discussion and questions with vote deferred until April OVCC meeting
- April 2 – Topic was focus of Tuesdays with Nancy discussion from which came the following action items:
 - ✓ Topic needs to be presented to, and agreed to, by Falmouth House residents – completed April 4
 - Topic needs to be presented to, and agreed to, by Cumberland Crossing residents – work in progress
 - ✓ Details sent to Cumberland Crossing Community Association Board Members
 - ✓ Cumberland Crossing residents have been invited to April 8th OV Community Council meeting
 - Meeting with Cumberland Crossing residents is being scheduled in April – board preferred this approach rather than sending the details of this presentation to the residents via email
- April 8 – Possible inclusion of Falmouth House and Legacy Memory Care hourly, resident-facing caregivers was discussed with Diane Kibbin's managers

Recommendations

1. Recognize OceanView, Cumberland Crossing, Falmouth House & Legacy Memory Care as one community, treating all hourly, resident-facing employees (including caregivers) fairly. This would mean having community-wide solicitations and distributions.
2. Create a committee of volunteers to assist with the marketing of community-wide solicitations.
 - Solicitation letters would need to be finalized by April 30th (Independent Community and FH / LMC)
 - Letters delivered to residents May 5th and 6th
 - Resident donations accepted through May 31st
 - Gifts distributed early to mid June

Questions

Vote

Provided Cumberland Crossing agrees, the OceanView Community Gift Fund distribution should include Falmouth House and Legacy Memory Care hourly, resident-facing caregivers.