

LeadingAge™
Ohio

leadership academy

2014 Action Learning Projects



Partners:





Drew Allen

Organization: Otterbein Retirement Community

Title: Director of Dining Services

Name of ALP: Nurse Aide retention & recruitment

What inspired you to choose your ALP? How will this ALP impact your organization?

For my Action Learning Project I chose to look outside my department at nurse aide retention & recruitment. The inspiration for this project comes from this being our biggest organizational goal.

The largest hurdle we encounter at Otterbein Lebanon is the retention of our nurse aides. Currently we are averaging well below our target. Some staff are terminated because of disciplinary actions, some because of attendance, but many just up and quit. I am a part of the leadership team and we are looking into this concern. Every Monday we go over how many open nurse aide positions we have on that date. Currently we have 25 part-time and 10 full-time positions available.

How will this ALP impact your organization?

I believe that as a facility we all have to look into what we can do to retain our nurse aides. For example, in dining services, we work very closely with the nursing department, and we depend on them to help us serve the residents a great meal. Because of that, I am always looking into how I can make nursing's job easier related to dining services. I recently looked at our room service system, and how time consuming it was for nursing to find a different lid for every item on the tray. To address this, I have recently purchased a clear dome that fits on the entire tray. I believe as an entire facility we need to look into how each department can and is affecting nursing. So the impact that this will have on our organization is huge!

What are the goals that you hope to accomplish with your ALP?

1. Our first goal is to retain more nurse aides.
2. Our second goal is to recruit more nurse aides.

Who will be your sponsor?

Sharon Strunk, the director of nursing, will be my sponsor.

Have you had a conversation with this person?

Sharon and I talk about once a week about our nurse aide retention and or recruitment.

How do you plan to follow up and communicate with your sponsor?

I plan to follow up and communicate with my sponsor by talking to her every Monday about how many nurse aide openings we currently have. I also will talk to her on a as need basis about concerns that I hear and see concerning nurse aide retention/recruitment.

In order to accomplish the goals of your ALP what are your next steps?

Recruitment is a big factor in our nurse aide retention. We have to recruit new nursing staff constantly to fill our open positions so that we keep our current staff happy. Recently for this project I sat down with half a dozen nurse aides to ask them their opinions. I asked them what are the biggest perks for nursing staff to work at Otterbein Lebanon. They first named the reduced benefit option, which allows staff member who do not need full benefits to opt for a 12% increase in their hourly wage. They then mentioned the on-site YMCA that is offered for free to employees. And lastly they mentioned the free lunch that is offered to all 1st shift employees. I then took all of these perks and went to HR to help them create a flyer for recruitment. We thought since these were perks that a majority of facilities don't offer, this would help draw more candidates to apply. Our end result is to retain more nurse aides so that we don't have to look for more staff. While doing my research with the nurse aides, I learned that years ago we had a waiting list for nurse aides! That sounds like a fairytale right now, but I know there are many factors of why that isn't so anymore. First of all there is much more competition with retirement communities. Second of all we are expecting more out of our staff and we are holding them accountable. Our attendance policy is very strict and is a "not at fault policy", whereas in the past we were much more lenient. All in all I believe if we work together and communicate better we can turn around this hurdle that we have at Otterbein Lebanon.

What are you learning about yourself as a leader during this process so far?

As a leader I am changing the way I lead my department and organization. In my past Director of Dining roles, I was only focused on dining services, whereas now I am focusing on the organization as a whole. For example, if I were doing this ALP 3 years ago, I probably would have focused on something pertaining to dining services. I specifically chose to focus on something outside of dining services, in order to become a stronger leader for the organization and not only the department. My goal is to continue to grow as a leader and to continue to look into how I can help strengthen other departments.



Nicole Cassidy

Organization: Senior Independence, OPRS

Title: Director of Business Development

Name of ALP: TEAMworks

What inspired you to choose your ALP? How will this ALP impact your organization?

I have been in the home and community based services industry for the past 8 years. Due to the nature of our division and industry it has become apparent over time that the employees of this industry work in a silo-type environment. The daily operations run as such: the marketing

department role is to bring in the business, the clinical department role is to serve the client, family and organization. The two roles are working in the "field" and rarely come into direct contact with each other. The goal/mission of each is to serve the client/family/organization with the highest quality of care, under CMS guidelines in the most efficient timeframe. I firmly believe that we all strive to achieve this mission, but also believe that working together this could be accomplished with greater satisfaction of all touched by the process: the employees and the clients.

What are the goals that you hope to accomplish with your ALP?

The main goal of this ALP: To be recognized as the premier provider in Community Based services (Home Health, Hospice and Adult Day) in quality care, while being a preferred employer for the employee base. I believe that this ALP can be measured through four core metrics: Increase in productivity, Increase in employee satisfaction, Increase in customer satisfaction and a Decrease in turnover.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

I have chosen Sheila Flannery, Executive Director, to be my sponsor. We have had conversation regarding the structure and plans for this ALP to be put into action. I believe that she is a good sponsor to the ALP because she has demonstrated a clear and balanced understanding for both of the roles that will be involved in and brought together through this ALP. As the Executive Director it is her duty to ensure that the division provides and succeeds at all of the metrics described in the goal of this ALP. She will have the ability to guide and direct those effected by and involved in the steps of the ALP process.

In order to accomplish the goals of your ALP what are your next steps?

1. Bring the roles of the Marketing and Clinical Teams together for a "State of the Office" event. Through this event we will define the overall goal of the organization for the upcoming fiscal year and how the two roles effect and contribute to the success of that mission. At this meeting we will get a current measure of the metrics listed above as our starting point.
2. Meet with Leadership team: I will meet with the leadership team on a monthly basis to maintain a sense of where the "teams" are at in the process and any necessary changes along the way.
3. Divide the roles into teams according to territory. These teams will meet on a monthly basis to review the following:
 - a. Current Clients
 - b. Current Business prospects/customers (ie. Co-marketing opportunities, leads, client visits)
 - c. Pending client needs (ie> Make it Happen events)
 - d. Other: any issues/challenges/needs expressed by either role that can be reported to the Leadership Team
4. Quarterly "State of the Office" events to provide ongoing feedback and status of the growth of the organization. At the close of the fiscal year we will pull the teams together again and provide a similar questionnaire for the employees to participate in. We will compare the feedback from the start of the fiscal year to see how we resulted in our metrics.

What are you learning about yourself as a leader during this process so far?

I have already learned much throughout this project, and the training program altogether. It is amazing when you are in tune with your surroundings and learning how much more you see and sense from those around you and what you hold within you. One of the key things I have learned about myself as a leader so far is that I really do look at the bigger picture, without much force. I am always looking to have everyone at the table gain from the situation or plan. I feel that everyone and everything will be so much more successful and bigger than originally planned. The challenge I am finding is to communicate the vision in a way that others can see it. I often get so excited with planning itself that I do not take the time to consider the needs of the communication process. I believe this will be an ongoing learning experience that I will need to harness and develop.



Debra L. Durbin

Organization: Chapel Hill Community

Title: Administrator

Name of ALP: Memory Support Neighborhood at Chapel Hill

What inspired you to choose your ALP? How will this ALP impact your organization?

After attending the Leadership Academy, it became evident to me how dysfunctional and broken the leadership team had been. Management had not had any self awareness of their styles, trust in each other, or vision on how what the future would be as a team. Looking towards the future and plans

for new concepts of living and new buildings the only successful way to move forward is to have a successful cohesive leadership team.

What are the goals that you hope to accomplish with your ALP?

Since I have started working at Chapel Hill Community, I have not been happy with the services or environment of the Memory Support Neighborhood. Improving the environment and services will impact Chapel Hill by improving satisfaction of residents/families/staff and give us something we can be proud of.

What are the goals that you hope to accomplish with your ALP?

1. Improve staffing, both in number and knowledge
2. Improve the environment
3. Improve dementia programming
4. Reduce number of incidents

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

My sponsor is my boss, Chuck Mooney. He is the COO and Senior VP of operations at United Church Homes, Inc. I have had many conversations about this. I will communicate with Mr. Mooney, weekly via email reported, face-to-face meetings and telephonically as needed.

Who have you selected as a mentor? How do you hope this mentor supports you in your ALP? Have you communicated with your mentor? How do you plan to follow up and communicate with your mentor?

Chuck Mooney as stated above. I will also consult with those at United Church Homes that have greater knowledge of successful dementia units.

In order to accomplish the goals of your ALP what are your next steps?

Have a meeting with key stakeholders to develop goals and what we want to finished product to look like.

Find a leader who will "own" this unit.

Consult with an architect for master planning for Chapel Hill and specifically the Memory Support Unit.

Secure the resources to change the environment.

Recruit, hire and train staff for the Memory Support Unit. Provide special training for those working with Dementia.

What are you learning about yourself as a leader during this process so far?

I don't have all the answers and don't even have all the questions.

This process is bigger than what I can solve. My role might be more of a barrier buster than that of a program developer. There are resources to tap that have many years of successful experience in dementia and I need to allow them to develop the process while overseeing it and making sure they have the resources to accomplish the plan.



Ross Farnsworth

Organization: Maple Knoll Communities – The Knolls of Oxford

Title: Administrator

Name of ALP: Implementation of MOLST – Medical Orders for Life Sustaining Treatment

What inspired you to choose your ALP? How will this ALP impact your organization?

After seeing the benefits from the implementation of MOLST in LaCrosse, Wisconsin, and discussing MOLST with Dr. Douglas Smucker, I knew that The Knolls of Oxford and the surrounding health care providers would greatly benefit from the implementation of the MOLST paradigm. The Knolls of

Oxford will benefit from participating in this implementation by being able to more accurately provide end of life care/treatment and be able to honor residents' end of life care/treatment requests even if that discussion did not happen at our organization. Not only will The Knolls realize this benefit but also other health care providers in our community. With other health care providers in the surrounding area trained on MOLST and having signed agreements stating they will honor the Cincinnati Area MOLST form we will be able to honor resident end of life wishes across the continuum of care in the community (local hospital, other long term care facilities, etc.).

What are the goals that you hope to accomplish with your ALP?

With the implementation already underway we have accomplished several goals. The next big goal we have in place are to educate other health care providers in the area so that they can have select staff become trained as a MOLST facilitator. Once they are trained on filling out the form with residents/patients/clients, the next goal is to have a signed agreement in place between the different local health care providers so that they will honor the Cincinnati Area MOLST form when residents/patients/clients transfer from one level of care to the next across the health care continuum.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

My sponsor will be Scarlett Kilgore, LSW and Director of Program Services at the Knolls. Scarlett has been trained as a MOLST Facilitator, and also has been trained as MOLST Instructor. Scarlett has become The Knolls point person throughout our CCRC for end of life discussions and advanced care planning. We have begun implementation between the local hospital and ourselves and we plan to expand the implementation to other community health care providers. This will require ongoing communication as needed during and after implementation.

In order to accomplish the goals of your ALP what are your next steps?

Next steps include meeting with other health care providers in the community to educate them about our implementation and the positive impact it will have on the lives of those we serve. After meeting with the providers, they will have to choose staff to become a certified MOLST Facilitator so that they are able to complete the MOLST forms. We will then need signed agreements between providers as we continue to add new health care providers to our 'network' who adopted and will honor the MOLST paradigm across the care continuum community wide.

What are you learning about yourself as a leader during this process so far?

Throughout this process I have learned that collaboration, inside and outside of your own organization is crucial for success. This implementation would have never gotten off the ground without the buy-in and follow through with the local hospital and emergency responders. Another take-away I learned was that people find change difficult, and to push change through you need a champion: someone who has the vision and commitment to work on a project from start to finish and someone who can see, explain, and help others realize the benefits of the project. Leaders look at and understand the big picture. Not only will this implementation benefit my organization, and other health care providers in the community but also it will greatly impact the people that we collectively serve across the community continuum of care.



Scott Gibson

Organization: Mt. Healthy Christian Village

Title: Executive Director

Name of ALP: How can we promote government advocacy for our retirement community?

What inspired you to choose your ALP? How will this ALP impact your organization?

It's no secret that government decisions have a direct impact on our industry, so I have long recognized the need to make lawmakers and other decision makers aware of our needs. But I became especially aware of the magnitude of the problem after we did an exercise with some professional,

well known advocates in our industry here in Ohio during one of our sessions at the LeadingAge Ohio Leadership Academy. This session was led by Bridget McAuliffe, David Paragas and Steve Wermuth. They led us to do a mock debate about an important issue at the time, dividing us into 2 groups to debate each other both for and against the issue. I was amazed at how unprepared and unequipped most of us were to address the issue confidently. We didn't know the issues at hand and had to educate ourselves in order to speak intelligently on them. If we cannot address the issues confidently even among ourselves, then we face a daunting task in trying to address them with lawmakers. I truly believe if we educate ourselves on the ever-changing issues related to our industry, we'll be better equipped to educate those decision makers. Only then will we make them our advocates who can make a difference for the better.

What are the goals that you hope to accomplish with your ALP?

Goals:

1. Know the issues at hand! Be able to carefully articulate our points in a positive manner.
2. Educate our residents and staff on these issues.
3. Educate our local, state, and federal officials who have the most input on the issues related to the healthcare industry.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

I am partnering with Christian Benevolent Association to make it a priority to invite, educate and help us to intimately know the issues at hand related to the healthcare industry and how we can help support it.

In order to accomplish the goals of your ALP what are your next steps?

- a. Identify the key issues that affect our industry in general and our own facility in particular. (Perhaps you could say identify a certain number of key issues—3? 5?)
- b. Develop a program to educate our residents and staff on the important local, state, and federal issues.
- c. Identify key local, state and federal officials who have the most input on the issues related to the healthcare industry.
- d. Reach out to these officials and invite them to our community and/or met with them in their offices.



Katie Gulgin

Organization: Otterbein Perrysburg

Title: Guide/Administrator

Name of ALP: New Menu Program Task Force

What inspired you to choose your ALP? How will this ALP impact your organization?

We have a menu program in our neighborhoods that is outdated. Our dietician and diet tech have been researching and trialing a few different programs with not much feedback from other neighborhoods. Implementing such a program also needs support from corporate leadership. I

know the needs of the neighborhoods and am good at getting feedback from all levels in the neighborhoods. I also have good relationships with corporate leadership to move the project forward. The entire food process can be streamlined if we find the right program and the diet tech and food coordinators will save valuable time.

What are the goals that you hope to accomplish with your ALP?

- Find a new menu program that all neighborhoods are happy with and does everything we want it to.
- Implement that program in all 5 neighborhoods.
- Strengthen my leadership and communication skills in new group settings.
- Strengthen my organization and communication skills across multiple locations and partners of all levels of the organization.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

My sponsor is Sue McConn, VP of the Small House Neighborhoods. I follow up with her at each operations meeting to give her and the other neighborhoods and update on the menu program progress.

In order to accomplish the goals of your ALP what are your next steps?

- Set up a meeting to incorporate EA's, diet tech's & dieticians from all neighborhoods
- Plan agenda for first meeting w/my dietician and diet tech
 - Agenda to include Prayer, Brainstorm What We Want, Other Programs We Have Already Looked At, Menu Program Demo, Next Steps, Best Practices
- Speak with Menu Program Designer
- Book Conference Room & Food
- Hold Meeting
- Design Rating Tool
- Trial 2 Menu Programs
- Get Approval from VP if one of the programs are successful
- Plan Implementation

What are you learning about yourself as a leader during this process so far?

I am learning that I am capable of running group meetings with people I've never met to accomplish a common goal. I realized that I forgot to involve IT, which is a key component in implementing a menu program. Glad that came to light early on. There are still partners at the corporate office that I could utilize more but tend to do things on my own. I need to learn to let others at the corporate office do more for our neighborhoods.



Kristen Jones

Organization: Wesleyan Senior Living

Title: Vice President of Development and Church Relations

Name of ALP: Continuation and Expansion of Virtual Dementia Tour Project as an Engagement Resource

What inspired you to choose your ALP? How will this ALP impact your organization?

The impetus for this project began about two years ago when I approached a local foundation funder with a proposal to initiate this program in our community. At the time, our primary goals of offering this training to our staff were to identify and challenge common myths and stereotypes related to aging, and participate in a simulated experience as an elder. Staff would apply the skills and strategies learned, as well as increased sensitivity, as they plan how to make individual, organizational, and global changes to meet our aging population's needs and expectations. Since that time we have trained our Executive and Management Team, and begun systematic implementation for our entire 389 person staff.

As we continued to build this program as a staff training exercise, I also began to visualize how this could be used as a tool and resource to increase community, family member, and donor engagement with our mission, and I began to roll this program out to selected groups of constituents which included funders and ministry groups. As our new strategic plan came into focus, the need for further implementation of this project was then integrated into those objectives as an important engagement tool.

What are the goals that you hope to accomplish with your ALP?

- Inspire our staff to fully implement Person Centered Care as the standard of practice for all residents and staff in Wesleyan Senior Living's care settings.
- Better understanding and skills to help identify the true needs of the aging population and to be effective in service to them.
- Increased skills for our workforce and enhanced knowledge base through experiential training.
- Help engage external constituents in identifying and challenging common myths and stereotypes related to aging, participate in simulated experiences as an elder.
- Develop strategies to help build enhanced elder relationships.
- Better facilitation of individual, organizational, and global decisions changes to meet the aging population's needs and expectations.
- Build awareness to prevent age discrimination and elder abuse in the external community.
- Provide hope and support for family members who care for an elderly person, and increases sensitivity towards this disease.
- Promote understanding of physical and mental challenges of the elderly, and increases community awareness for policy decisions that affect the aging.
- Assist our organization in increased hands-on outreach and engagement in our mission focus, and provide a means for others in the community to understand what community-based services are available to them.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

My sponsors for this program are my fellow Executive Team members, who assist in the integration of our strategic plan, the continued implementation of this program as a staff training tool, and in further strategizing how we can employ this program to strengthen our mission message and outreach into the greater community. Within that group, I particularly rely on the opinion and expertise of Cathy Dusky, RN, director of residential services, both as a personal mentor, and for her professional expertise in this area. Judy Boiwka, RN, healthcare staff educator, is also very integral to this program as our head facilitator of this training experience, and we work closely to determine the ongoing and future needs for coordination.

In order to accomplish the goals of your ALP what are your next steps?

I am currently seeking funding for the expansion of this program so that we can achieve further implementation into the greater community. I have already begun implementing this program for related ministry groups who share in our mission. Currently, we are experiencing a risk to this program because of the large amount of staff and volunteer time required for each session. Once



additional funding is established, we will send two additional staff members to out-of-state facilitator training, and this will allow for more efficient operations as well as further implementation. I will create a structure for external coordination of this program for groups that have been identified as strategic priorities, beginning with our Board of Directors this fall. At that time, we also will be conducting our first pilot group of family members of residents. Funding will determine the feasibility and extent of broader implementation.

What are you learning about yourself as a leader during this process so far?

I have learned that flexibility and patience are needed to allow program such as this to evolve and fully take shape, and that in that process, doors can open that allow you to visualize how a project can take multiple directions. Personally, from taking part in this experience as both a participant and several times as a volunteer Behavioral Observer, I have increased my level of empathy both for older adults who experience dementia, and also for our professional staff who provide care, 24/7. I have witnessed how important it is to facilitate opportunities that allow the external community to see our mission statement in action, and how much stronger those messages can be when they are experiential in nature.



Evan Lubline

Organization: Montefiore –The Weils

Title: Administrator

Name of ALP: The First 90

What inspired you to choose your ALP? How will this ALP impact your organization?

As the Administrator for the campus I have seen the impact turnover has on residents, families and staff. My goal is to increase the onboarding process here at The Weils campus. It can be said that “Happy staff make happy residents.” The first few weeks and months for any new employee can be challenging, keeping good staff and training staff is the key for an effective and efficient facility. My goals for this project are to review the onboarding process for new as well as looking at how we select new hires in the nursing department for state tested nursing assistants.

What are the goals that you hope to accomplish with your ALP?

My goals as the Administrator for the campus are to improve employee retention by selection of new staff members to The Weils’ Team. STNA’s will assist Administrator and Nurse Manager in selection of new hires for STNA’s. New staff hired will also be assigned to work with a seasoned employee to learn the facility. The goal is to meet with all new employees two times in the first 90 days to check in and see how they are working out in the facility, answer any questions and see about any obstacles they might be having as they adjust to the facility.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

Lauren Rock, President/CEO, I meet weekly with to discuss operations of the campus. Lauren has always been available to answer questions and guide me along the way.

In order to accomplish the goals of your ALP what are your next steps?

The Next steps will be to meet with staff and select STNA’s to help interview. Develop a timeline and questions to help select new hires. Also development of a mentoring program for all staff that come on to The Weils’ team. I will meet with the staff on days two times in the first 90 days as part of my check in process. I will continue to conduct all staff meetings to discuss in general areas of focus and get feedback from the current staff on how we are doing with new staff.

TimeLine

- November 1st orientation group to meet and establish times with Administrator on two times in the first 90 days.
- STNA peer interviews to start in November to work on hiring the best candidates as to assist with STNA Turnover.

What are you learning about yourself as a leader during this process so far?

Your success as a campus comes by who is on your team. New employees and having employees on your team through retention is critical to the success of residents coming into your facility. Onboarding process is a major key to an organization. As the administrator I want to be involved on day 1 and set the tone of my expectations along with the organizations expectations. Being the leader on a project like t is and helping new employees start off on the right track will help years down the line when they become seasoned employees. The success of your facility and the satisfaction from your residents comes from who we bring on to the team. Listening to your staff about what is needed and new ways of improving is important as I develop systems such as the peer-to-peer interviews for new staff.



Lisa Mansour

Organization: Breckenridge Village

Title: Associate Executive Director

Name of ALP: Team Development Using The D.I.S.C. Profiles

What inspired you to choose your ALP? How will this ALP impact your organization?

The realization that all staff can and should benefit from learning how each person's behavioral style affects not only his/her actions but the actions of others. This understanding should help our teams develop and work together to resolve conflicts and misunderstandings which can lead to the

development of new or better programming and services to care for our residents.

What are the goals that you hope to accomplish with your ALP?

I hope to accomplish more engagement from the line staff to create a more harmonious workforce environment and overall a better place for our residents to live. In addition, I hope giving employees that education will help them better understand themselves and others not only in the work environment, but in their personal lives as well.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

I will be working closely with the Leadership Staff on this project. We will plan and coordinate all of the training sessions together with each Leadership Staff partnering to engage the employees. Through this collaboration, the Leadership Team will also have the opportunity to learn and grow.

In order to accomplish the goals of your ALP what are your next steps?

Creating ways to keep the information alive and meaningful. This may include having random quizzes and puzzles available that pertain to the material learned through the DISC training. We will post promotional material in the employee breakrooms and by the time clocks. In addition, we will have concepts of the DISC training be a part of department meetings and daily huddles.

What are you learning about yourself as a leader during this process so far?

I am learning that I need to allow others to lead and to capitalize on their strengths and engagement. I also realize that as a leader, I need to inspire others through my actions at all times, whether it is when I am making rounds, attending meetings, or simply conversing with residents and families.



Sondra Marker

Organization: Otterbein Senior Lifestyle Choices

Title: Asst. Vice President Sales/Marketing

Name of ALP: Implementation of Independent and Health Care Sales Tracking tool

What inspired you to choose your ALP? How will this ALP impact your organization?

I have been charged to create an elite sales force for the organization as part of my long term goals for Otterbein Senior Lifestyle Choices. Understanding the sales process and the impact of close ratios, sales cycles, and touch points per referral will ultimately help us drive our sales success and

training focus. The better we understand the sales process, the more we will impact revenue for the organization and help our sales team determine ways to improve close ratios, understand market dynamics, and focus on the number of touches needed to drive census. In addition, this will help the sales force better understand how to drive the sense of urgency, help prospects work through issues by discovering needs through the entire sales process, and look for gaps in the sales process to better identify which leads are hot/warm/cool. The end result will result help prospects make a move to Otterbein with the assistance of the sales force removing barriers and understanding their needs prior to residency. This in turn will reduce the potential stress of moving to a retirement community and create a win/win for both the prospects, partners, and organization.

What are the goals that you hope to accomplish with your ALP?

- Create a system that will allow us to track close ratios, sales touches, zip code analysis, and relationship to adult children and the sales process.
- Understand how we can more effectively reach the right target audience, shorten our sales cycle, and improve our close ratios.
- Develop training geared towards what our measurement of the above objectives demonstrates to be our highest need of education.
- Create an elite sales team with benchmarks above industry standards for sales and close ratios.

Who will be your sponsor? Have you had conversation with this person? How do you plan to follow-up and communicate with your sponsor?

The sponsor for this project will be Gary Horning, Vice President of Marketing. Gary will be involved in helping to review the tracking system and evaluating the results.

In order to accomplish the goals of your ALP what are your next steps?

My next steps will be to determine what information should be evaluated, how to gather the information for evaluation, who should be on the team to help establish how the information will be gathered, and to create a communication plan for the sales team to roll out the value of the project. In addition, I will need to create the sales tracking system, in conjunction with Pam Richmond, and train the team to use the system. Before roll out, introduce the project to the team so they can help support the project and not see the system as more work for them in an already busy day.

What are you learning about yourself as a leader during this process so far?

I am learning to slow down and involve other people in the process. As a "pioneer" I want to plow ahead and implement the project my way but realize it is important to slow down and help the team see the big picture and how this will benefit them and the organization in the future. Because there is a sense of urgency to create an elite sales team at the upper management level, I need to be careful to instill why this is an important process to the sales team and ask them for involvement.



Jim Patena

Organization: Jennings Center for Older Adults

Title: Administrator, Independent Living and Community Based Services

Name of ALP: Transparency in Project Planning

What inspired you to choose your ALP? How will this ALP impact your organization?

I have been at Jennings since I began my AIT 9 years ago. Since that time I have seen our organization grow in many ways. One of which was our first “off campus” apartment building. At Jennings we are always looking to expand our mission to serve seniors. This means that there are many projects going

at the same time.

It is important for any organization growing its reach into the community to transparently communicate the direction it is going and prioritize the dedication of resources to the various projects that come with growth.

Implementing a communication/prioritization tool to transparently communicate direction and project planning will strengthen the leadership team and inform the organization about where we are going and how we mean to get there.

What are the goals that you hope to accomplish with your ALP?

I hope to be able to utilize the software tools we already have to increase transparency and prioritization of goals and objectives. Accomplishing this will strengthen our organization by keeping everyone in the organization aware of where we are, where we are going, and how we are getting there.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

My sponsor is Allison Salopeck, President and CEO. We have discussed this project and what we would like to see it accomplish over the next year. Since Allison is my direct supervisor, we will be discussing the progress at our bi weekly meeting.

Who have you selected as a mentor? How do you hope this mentor supports you in your ALP? Have you communicated with your mentor? How do you plan to follow up and communicate with your mentor?

Allison has been my mentor since I started at Jennings. She is very supportive and gives me the opportunity to grow my skills by providing direction when needed. She is a very good person to provide advice from her vast experience in the field of senior care.

In order to accomplish the goals of your ALP what are your next steps?

1. Work with HR Director to understand the capabilities of the software we have.
2. Work with HR director to discuss what data and progress has been made thus far on this project.
3. Meet with the leadership team to identify what would like to see this project accomplish.
4. Create a structure for identifying;
 - a. Projects
 - b. Prioritization and assignment of projects
 - c. Drivers of projects
 - d. Progress reporting
 - e. Accountability
 - f. Timelines for involving others in projects
 - g. Ways to communicate organizational direction and project updates to all staff.

What are you learning about yourself as a leader during this process so far?

The Leadership Academy has taught me many things so far. The most important of these things has been the deep dive into who I am. The “soul” searching tests, the books, and the friends that I have gained through this experience have supported my growth not only as a leader but as a person.

I learned that I am always going to try to make sure that everyone on my team is ok. I learned how much trust plays into being a good leader. Positive intent is extremely important and must be communicated through my actions. I have learned skills that have allowed me to “lean into” the uncomfortable situations that come up on a daily basis and have achieved positive results.

My growth as a leader will continue to evolve over my career with the support of my new friends and the tools I take with me from the 2014 Leadership Academy.



Tricia A. Petersen

Organization: The Ohio Eastern Star Home

Title: Director of Nursing

Name of ALP: Fall Huddle

What inspired you to choose your ALP? How will this ALP impact your organization?

Falls in our home have exceeded the National Averages for the last year. It has become our focus project with our Quality Assurance Performance Initiative program. There is an immediate need for our care partners to become active members in our Fall Huddles. It is imperative for ALL care

partners to understand how they play a key role in fall prevention despite how little the effort may seem.

What are the goals that you hope to accomplish with your ALP?

The expectation of the Fall Huddle is to show a decrease in the number of falls with our Elder population and an improvement in our Quality Measure reports. This will be directly measured on our quarterly quality measure report.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

Michele Engelbach, CEO and Wendy Ferenbaugh, QA RN are my sponsors as we work directly in the reporting and investigation of each fall in our community. The three of us along with our Interdisciplinary Team meet weekly to discuss and further investigate the fall reports.

In order to accomplish the goals of your ALP what are your next steps?

Our continued efforts are to bring the Fall Huddle campus wide. We initially began the action in one area. The beauty of this action is that it now involves ALL CARE PARTNERS, not just Nursing staff. ANY one can initiate the huddle and fill out the self-directed report accordingly. Our next QAPI meeting is scheduled to kick off the huddle in all areas with the intent of narrowing down the root cause.

What are you learning about yourself as a leader during this process so far?

In appreciation of the Leadership Academy I have taken the time to reflect on my leadership role and how to expand on modeling and coaching. This allows me to not always have the answers but to extend my trust in my team to assist in the journey. It has been a very eye opening experience for me as I continue to grow as a leader and taking the time to compliment others accomplishments and expressing my gratitude. Learning to "lean in" to a difficult situation has given me a sense of empowerment which reflects on the team that they just need guidance from me and not my constant direction.



April Queener

Organization: Mohun Health Care Center

Title: Administrator

Name of ALP: Activity and Environment Enrichment of the 4th floor

What inspired you to choose your ALP? How will this ALP impact your organization?

At one time our facility placed all cognitively impaired residents in one unit. Some years ago the layout of the building provided safety throughout so that the residents on that particular unit could move freely throughout the whole building. Residents that have aged in place are now scattered throughout

the facility so that dementia care is now provided throughout the facility. The stigma amongst residents who are potential health care residents remains that the “the unit” is for the more severely cognitively impaired.

“The unit” is environmentally set up different than the other floors with an oddly shaped “living area” that has become the hub or “living room” of the floor. The natural tendency of the floor is to congregate residents in this area for activities and supervision. The area needs a face lift. I would want this area to feel like “home” like the rest of the center. It is by far the most institutional area of the facility.

Last September we added a staff member with the title Activity Enrichment Coordinator to make a calendar specific for this floor and our residents with dementia. She has done a great job establishing a schedule of solid programming for the residents. It is now time to engage the rest of the staff, specifically the STNA’s, in providing more programming and meaningful engagement for the residents.

The nursing care on “the unit” is second to none. I have never worked with a more dedicated group of nursing assistants that truly know and anticipate their resident’s needs. This group was providing person centered care before it was a catch phrase. It is now time for the activity programming to match the level of nursing care provided.

This ALP is personal to me as I have had the pleasure of serving as Administrator of an all dementia building for nine years. It was a luxury to focus on all Alzheimer’s all the time. Everything we did from meal times to fall interventions all came from a mindset of how could we best meet the needs of those with dementia. I loved to tell family that I was touring that there is a difference between a unit and a whole facility dedicated to dementia. We provided top notch care and my firm belief was that a unit could not meet the resident’s needs in the same way. I now find myself responsible for a unit. It can get lost in the priority list easily as residents with higher acuity needs may need more attention. I am looking forward to holding my team and myself accountable for the environment and programming that we provide.

What are the goals that you hope to accomplish with your ALP?

The first goal will be to provide a more homelike environment that is comfortable and dignified. This environment must meet the needs of the residents to assemble and to be supervised. An area must be available to complete some activities.

The second goal is to provide more meaningful interactions between the caregivers and residents. This will be accomplished through scheduled programming and one to one interactions.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

Sister Diane Traffas will be my sponsor for this project. She is my liaison between the board and the corporate members of the congregation. She is aware of the project and the Board of Trustees is aware.

In order to accomplish the goals of your ALP what are your next steps?

We have formed two committees of eight people to evaluate, review and improve the environment and programming of “the unit”. Each group consists of a cross section of skill sets including nursing, social service, maintenance, housekeeping and Sisters that work in our ministry that are responsible for Resident Life. Both committees have had initial meetings and updates have been given. I am on the Environmental Committee but not leading it. I am enjoying the opportunity to be a team member and encourage my staff to work together and lead.

What are you learning about yourself as a leader during this process so far?

This is a great opportunity to take one of the larger issues of our facility and use some of the strategies that we have learned over the year to move it forward. We had several meetings prior to the establishment of the committees to team build and complete activities that would pave the way for us working together. I am learning to encourage others to lead and to be there for motivation and guidance when needed.



Pamela Riter

Organization: Eliza Jennings–Health Center at the Renaissance Retirement Campus

Title: R.N. – Director of Nursing

Name of ALP: STNA & Nurse’s Competency Program; STNA Mentoring Program

What inspired you to choose your ALP? How will this ALP impact your organization?

I was inspired to initiate a competency program for aides and nurses because I felt that with the rapid changes that are occurring in the healthcare field this would be a good way to help ensure that our staff is well prepared to handle those changes and the higher acuity residents now and in the future.

In addition to the competency program I am also working on a STNA mentoring program; this was chosen after listening to staff in regards to their concerns related to consistency with the orientation training of new aides. I would also hear from new aides themselves that they would feel at times that their orientation was lacking, they weren’t getting all the information they needed and/or at times they were getting conflicting information from staff that was doing the orienting. These projects will enhance our organization by helping us to ensure that we are preparing a work force that is able to handle the ever changing dynamics of healthcare. These programs will also enable our staff to feel confident about themselves and the quality of care they are providing.

What are the goals that you hope to accomplish with your ALP?

The goals in relation to the competency program are being able to know that both our aides and our nurses are competent in their areas of work, that when different tasks are to be performed by them we know they have the skills and knowledge to be able to do so expertly. We also want our staff to feel confident in themselves and their abilities and wish to help them grow in their respective roles. The goals in regards to the mentoring program are to ensure that new employees are receiving correct information, that it is being imparted fully during their orientation period so that once they are working independently they have the knowledge and resources to complete their duties well. We also want new employees to have developed a positive relationship with the staff who are the mentors, to know that this is someone they can go to as a resource for them, that they are not alone once they are no longer on orientation. Another goal of this program is to allow some of our frontline staff to “shine”, our mentors will be the “best of” our team, it will help them, and allow them, to grow as leaders in their field.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

My sponsor for both programs is our Executive Director, Sandy Skerda. We have had many conversations already as both projects are currently implemented to some degree. Sandy and I have a weekly standing meeting and both projects are frequently discussed. In response to the optional questions below I would have to say that Sandy has also been my mentor for the projects, she is fully supportive of both and encourages me in both areas and supports me as needed.

In order to accomplish the goals of your ALP what are your next steps?

We have already implemented a portion of the competency program, we developed an outline of what we would include in the competency testing for the aides, determined who would oversee the different “stations” they would be tested on, planned the layout of the room, obtained necessary equipment, developed a checklist to be completed as they went thru and also decided on some “rewards/incentives” for them when they completed their testing. We held the first STNA competency testing in June and I can say that it went very well. We will be holding a second STNA competency in November for staff that did not go thru in June. Our team is now working on developing the outline for the nurse competency program.

For the mentoring program we have at this point identified potential mentors for the program, and have also spoken with the aides that we felt were the best choices and now have seven who will be serving in the role of mentors. We have asked the mentors to review the orientation checklist for new aides and also to think about what color of scrubs they would like to wear that will identify to others their role as mentors. We are meeting with the group next week to discuss both of these components, after those changes will be made to our orientation checklist as may be needed. Once that is complete then I and other members of nursing management will go over all items on the checklist with the mentors to ensure that they are knowledgeable and consistent in their teaching of new aides.



What are you learning about yourself as a leader during this process so far?

What have I learned about myself so far: I have been in nursing management for 14 years and have worked on many projects but this I believe is the first time that I have started such programs from the beginning myself. The competency program is being implemented in both of our long-term/skilled facilities as well as both of our Assisted Living facilities, this meant I needed to bring together nursing management from four different areas, create a team that worked well together and accomplish the goals. I have learned that I was able to do that and do so successfully. I learned I was able to identify the “different hats” that were in the group, I was able to identify their weaknesses and strengths and to help them learn and grow as we moved forward as well as being able to learn from them. I also feel that I was able to develop a true level of trust with the team myself as well as within the group as a whole. I also learned that I am a good mentor, working with the management team I have been able to help the individuals realize how they themselves can be a catalyst for change and the process of improving quality care, I believe in helping them to grow that I am also leaving a legacy for the future leaders of the organization.



Scott Slutz

Organization: Ohio Presbyterian Retirement Services

Title: Corporate Director of HR Systems & Metrics

Name of ALP: Guide to Building a Strong Human Resources Board Committee

What inspired you to choose your ALP? How will this ALP impact your organization?

In my career, I have found that one of the most significant benefits of having an active Human Resources Board Committee has been the ability to leverage the expertise of that group when soliciting feedback, advice, or alternative views relative to the organization's strategic and

operational Human Capital initiatives. In my opinion, the most effective partnership is achieved when the makeup of the HR Board Committee includes several active HR practitioners. My objective is to create a best practice guide for establishing and maintaining a consistent stream of active HR practitioners to serve on the HR Board Committee.

Through the successful completion of this project, OPRS will be able to purposefully and systematically identify, attract, acclimate, and develop active HR practitioners to serve on the HR Board Committee. This allows OPRS to maintain a progressive Human Capital approach with the confidence that HR thought leaders have played an active role in shaping the direction of our strategy.

What are the goals that you hope to accomplish with your ALP?

Through creating the best practice guide, I strive to:

- Provide a useful list of topical areas to think about when considering Board Committee recruitment.
- Help identify and define the needs of the organization relative to characteristics, skills, experience and expertise of potential Board Committee members.
- Provide a methodology to find and recruit active HR practitioners to serve on the HR Board Committee.
- Design a systematic approach to screen and select appropriately qualified Board Committee candidates.
- Identify the scope, nature and timeline for new Board Committee member orientation.
- Modify existing Board Committee responsibility list to include ongoing succession planning to assist with perpetual "feeder system" of qualified practitioners.

Who will be your sponsor? Have you had a conversation with this person? How do you plan to follow up and communicate with your sponsor?

Dana Ullom-Vucelich, who leads the OPRS HR team as Chief Human Resources Officer, is my sponsor. During my early conversations with Dana, she was invaluable in providing input, opinion, and a historical perspective relative to previous OPRS HR Board Committee development efforts. Through these conversations, we focused on assessing the organization's overall key strategic objectives relative to Board Committee development and established the initial parameters that the process must comply with.

As this project progresses, frequent revision and re-evaluation is expected and therefore partnership and communication remain essential factors in achieving success. Because Dana will serve as the Champion of our Board Committee development efforts, creating a protocol which allows her to operate effectively and bring the process to life is key. This necessitates ongoing communication touchpoints to ensure shared understanding and alignment exists.

In order to accomplish the goals of your ALP, what are your next steps?

Several initial steps have been completed: discussions regarding the scope of this project; identification of key elements that are essential for HR Board Committee development; identification of characteristics/traits an ideal HR Board Committee member possesses.

Key next steps include drafting the actual recruitment and selection process, facilitating a focus group with various stakeholders (existing Board Committee members and Executive Leadership) to discuss and develop an interview process, and determine the primary elements of what a new Board Committee member orientation would consist of.



What are you learning about yourself as a leader during this process so far?

Through this process, I have been reminded of the importance of teaming and partnership. Utilizing and applying some of the strategies we have learned through the Leadership Academy has allowed me to more efficiently progress with the project and at the same time re-affirm a sense of alignment across all parties involved.

I find myself being much more aware of how my Myers-Briggs Personality Profile (INTJ) shapes my communication. Just as important, I have gotten better at keeping in mind which profile best describes those individuals I work and interact with. This awareness has improved the likelihood that my intended messaging is interpreted correctly as well as provides a more accurate prism with which to interpret messages and interactions coming from others.



Michele Tarsitano-Amato

Organization: Kendal at Oberlin

Title: Director of Creative Arts Therapy/Dementia Specialist

Name of ALP: Dementia Care without Walls: A Response Team

What inspired you to choose your ALP? How will this ALP impact your organization?

Assisting individuals suffering from cognitive loss has always been a passion of mine. Discovering the ability to reach people who are struggling to find meaning and provide guidance in a way that preserves dignity and respect has been a goal of our organization. An area that we continue to

struggle with is that of keeping individuals safe without the use of a locked or secured unit, not using one on one companion, and assisting couples to stay together in their residential home. As residents, families and staff members struggle with these questions, sometimes a skilled member of each department is needed to help prevent misunderstandings and conflicts before they start.

My goal is to create a Response Team that can address dementia care challenges in their department before they become incident reports. Our Dementia Care without Walls team will grow to hold at least ONE member from each department who will bring back training, and skills to help support our residents with cognitive loss.

What are the goals that you hope to accomplish with your ALP?

Kendal at Oberlin has received the Dementia Specialty Program Distinction from CARF/CCAC. It was noted in the assessment that we are unusual in this distinction due to our program not being a specific unit, but across our continuum. This unique aspect does create unique problems with Kendal Community members not feeling well trained in how to assist our cognitively impaired residents. With a specifically trained team, we can address this issue better and identify “weak” areas that need further training. By establishing this Response Team, we can help residents afflicted with dementia to enjoy life at a higher level of independence.

- Each department will have at least one identified staff that can help process challenges with individuals.
- Each Response Team member will be well versed in Kendal’s Values and Practices and dementia care philosophy. As such, they each will be able to provide the 2 hour new hire dementia training.
- The Response Team will meet monthly to review incident reports that involve difficult behavior issues due to someone with cognitive loss, and identify training opportunities and provide that training.
- The Response Team will be an advocate for our residents with cognitive loss, exploring creative ways to meet individual needs.
- The Response Team will look to identify barriers that prevent independence and will still reduce risks for our residents with cognitive loss.
- The members of our Response Team will verbalize that they are well trained and believe they can help their team understand cognitive loss behaviors, why they happen and what to do to reduce negative interactions.

Who will be your sponsor?

Stacy Terrell, supervisor and Chief Health Services Officer at Kendal.

Have you had a conversation with this person?

Yes

How do you plan to follow up and communicate with your sponsor?

Regular touchbases will include discussion on this program’s development.

Who have you selected as a mentor? How do you hope this mentor supports you in your ALP? Have you communicated with your mentor? How do you plan to follow up and communicate with your mentor?

– Phoebe Adams Thorpe – She has gone through the Center for Disease Leadership Program over two years ago. She is moving on as a new mentor. I communicate with Phoebe at least weekly. She is able to use the leadership tools from her program and we share experiences and what I have learned from my Leadership Academy experience. When I am running into issues with communication she is able to walk me through what the core issue maybe that is preventing me from moving a project or thought forward.



In order to accomplish the goals of your ALP what are your next steps?

- Identifying members from each department who have an interest in cognitive loss and are willing to serve on the Response Team Committee.
 - Completed May 2014.
 - A total of 15 members are on this team each department is represented, Only one Department Head (myself)
 - Housekeeping – 2
 - Dining Services – 3
 - Grounds/ Facility Services – 1
 - Nursing – 4
 - Social Services – 2
 - Creative Arts Therapy/ Fitness – 3
- Bring the team together; explain the vision is for the Response Team.
 - First was talking to each Department Head, explaining clearly my vision of a team, what I hoped to accomplish and who I thought would be good team members, as well as, who the DH would like to build leadership skills on their team.
 - Once all team members were identified, a meeting was held to bring everyone up to speed and agreement of this vision.
- Each team member talked about their hopes for helping those with cognitive loss.
- One member really was focused on identifying a “behavior issues check list” for the STNAs
- Using the tools from Leadership, I was able to get consensus from the group. We identified three areas of immediate direction:
- Reducing the stress of the resident so behavior outburst due to cognitive loss are reduced
- Staff Education on how to respond to difficult behaviors (Stop controlling a resident, redirect one’s own behavior)
- Identifying what RESPONSE means:
 - Response at the moment when an incident is happening. Empowering the team members to feel they can intercede.
 - Response afterwards and review incident reports to provide follow up and creative interventions.
 - NEXT STEP – Identifying and defining how the team would work.
- The Team then broke into two groups
- One developed Tools for monitoring behaviors
- One developed a universal incident report.
- This was done JUNE, 2014
 - NEXT STEP – Training the community to use the tools created.
- Next meeting is August; we didn’t meet in July due to vacations.
 - NEXT STEP – Training members of the Response Team to know the information for the dementia new hire in-service enough to run this on their own.
- August 2 members are trained. The rest are scheduled to be trained in September.
 - Additional Step – Teepa Snow, a nationally renowned dementia care expert is coming to provide in-service training to Kendal at Oberlin staff and interested residents, this event will also be open to other professionals in the area. The Team has taken on helping to organize and “sponsor” her training to the Kendal at Oberlin group, as well as Kendal at Home, Kendal Senior Independence.

What are you learning about yourself as a leader during this process so far?

An area that I continue to struggle with is, not shutting down when the direction changes to an area I do not wish it to go in. I struggle with “power” issues with some team members. I still work from a stand point of “Protector” and I am working on expanding my “circle of love” to include those who I feel in direct conflict with. I struggle with not solving problems for those staff who come to me to “vent” and I need to be strong about not being pulled into their “injustice” and making it my cause to champion. I am working on how to harness my power to move others to action, and how to use that wisely. I know there are not bad or good characteristics, just the appropriate use of a skill when there is an identified need for that skill.

I really want to see this Response Team grow. I have a vision that it will be a motivating force to help cognitively impaired residents lead “free” lives. This team will help our community keep “secure” units out, and not require one on one companion to keep a resident “safe”. This team will be leaders in providing person focused meaningful opportunities for continued growth to our residents with cognitive loss. The team will help model great interactions and reduce control issues. The team will be supports for their staff members and have the education and skills to actualize our tag line – together transforming the experience of aging!