

LeadingAge™
Ohio

leadership academy

Action Learning Project Summary



Partners:





Cathy J. Dusky

Organization: Wesleyan Village

Title: Director, Residential Services

Name of ALP: Implementation of Electronic Charting Throughout Our CCRC

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

The inspiration of my ALP was providing clinical staff the knowledge and training to move forward with electronic health record documentation within the clinical areas Residential Services of our CCRC. We are currently using the “Answers on Demand” program in a limited area of our clinical departments. Utilization of AOD throughout our CCRC will decrease expenses as all clinical areas use the same process for clinical record documentation and result in medical records continuity for our Residents if they transfer through the continuum of care.

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

The goals I hope to accomplish with my ALP is to have AOD accessibility for all clinical staff in all areas of our facility by the end of the calendar year, to have training on AOD completed, and to improve continuity of care for our Residents as they transition between the different areas of our community.

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?

Michael Goode, Director of Information Services and Judy Boiwka RN, Staff Development are instrumental in moving forward with my ALP. We have had meetings to determine needs and have developed an action timeline. We communicate routinely and plan to continue ongoing meetings.

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

Currently all staff have been given accessibility to the AOD program. Staff training has been initiated in our Adult Day Care area. The next step is to begin staff education and hands-on training for the Assisted Living areas.



Michelle Garcia

Organization: The Ohio Eastern Star Home

Title: Director of Human Resources

Name of ALP: Enhancing Effective Leaders

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 at OESH 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?

Among the goals I would like to accomplish are:

- Help facilitate and enhance communication at the director's level.
- Encourage self recognition of leadership styles.
- Move toward direct care empowerment.
- Continue to educate and resist barriers that impede communication among leadership team and between leadership and direct care staff.
- Encourage new softer styles of management and Empowerment of the direct care staff.
- Encourage new ideas and failures as learning lessons and not as punitive.

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 Michele Engelbach who is also my direct supervisor. The recognition and ongoing education will be crucial to the success of the organization and she is committed to assisting with ideas and direction. Regular meetings with my sponsor help to ensure that we continue to keep on track with the goal.

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

The next steps are to continue with monthly supervisor/leadership meetings which are informational and educational. We are working with all members to be as transparent as possible and encourage direct staff to bring ideas forward.

Weekly Director meetings have been an integral part of forward movement. All of the meetings have a set agenda including financials and QA.

Providing various exercises with each of the members to help gain self-awareness of styles they possess as well as learning management styles of others.

Begin our culture transformation journey resulting in direct staff empowerment.

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

I have learned that things do not happen quickly and patience is required above all else. Allowing people to fumble and make mistakes is crucial to their future and the future of the organization as a whole. I have become more understanding of processes, and insightful to the bigger picture. I have learned to try to let go of things that others are capable of doing and relying and trusting in their expertise and knowledge to complete assignments. Giving clear directions and setting expectations is vital to the completion of the tasks.



Janie Gustin

Organization: Butler County Care Facility

Title: Assistant to the Administrator/ Accounts Receivable

Name of ALP: Butler County Care Facility Listening Event

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

The importance of staff satisfaction is widely under-recognized and largely ignored in our industry. It is known competitors in our local market consider staff to be “interchangeable drill bits” and easily replaceable. We could not disagree more with this assessment. Our facility strives to be different.

Thus, we are interested in honest, real feedback from our staff.

Furthermore, the nursing home industry is very consumed with person-centered environments. The needs of staff should be factored into this as well. When a facility meets a staff’s needs, the staff can better serve the residents’ needs.

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

1. Determine the overall satisfaction of our employees (by hearing from everyone not just the vocal minority)
2. Decrease the barriers to completing tasks effectively and efficiently by:
 - a) determining the needs for additional training
 - b) Ensuring the staff has access to the necessary supplies and tools to fulfill their job requirements/tasks
3. Learn what best motivates our staff
4. Maintaining our high level of employee retention by having an understanding and awareness of the reasons they stay versus seeking employment elsewhere
5. Determine how well our management team is communicating its goals and expectations to the staff according to employee perceptions.
6. Form a committee of individuals interested in coming up with solutions to problems and implementing suggestions for improving 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?

My sponsor for this project is the training coordinator, Jannah Fitzwater. Jann has developed very good rapport with the staff and has worked on a nearly one-on-one basis with all of the direct care staff. We have had several conversations regarding the satisfaction level of the staff and their various needs. I plan to meet with her throughout this project and will use electronic correspondence (email) to set up meeting times.

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?

My mentor for this project is the facility administrator, Charles Demidovich. He has been incredibly supportive of the process of interviewing staff members to gauge their satisfaction with their positions at the facility. We have communicated quite a bit before the project got started and he was looking forward to seeing the results. I have followed up with him after each interviewing session and provided a brief summary of my findings. After the first set of interviews was completed (20% of the staff) a very comprehensive review of the results was done. We looked for similar themes, repeating concerns, and the overall tone of the responses. As a mentor, Chuck is encouraged by the findings and is helpful in thinking of ways to encompass staff suggestions into workable solutions that will benefit the entire facility.

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

The next steps of the project are to schedule time to complete the next round of interviews. It is the hope of both my mentor and me that we conduct interviews with 20% of staff members on a quarterly basis. The goal would be to include different individuals in the process each time.

Additionally, changes based on the first set of interviews will begin to take place. These changes stem from the issues that are repeatedly mentioned either throughout the facility or by one particular job designation. An example of one such change is to try a new system of nursing suggested by several members of the clinical staff.



Finally, I would like the new committee formed as a result of this process to get underway. This committee is to be comprised of interested staff members (as indicated during the interview) to meet to discuss suggestions and ideas to benefit the facility.

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

This project has been very valuable to me and in the process of its development and execution has taught me many things about myself as leader. I am encouraged by the way in which the staff has reacted to the listening event. They were very trusting of the process and I appreciate the candidness of their answers. This level of honesty conveyed to me the knowledge that I am a well – respected, trustworthy individual in the eyes of our staff. I have also learned that being a good listener is a very energy-intensive activity. I recognize the importance of being a good listener but now see how difficult (and exhausting!) that can be. Though I knew developing good relationships was an important part of leadership, I gained a new appreciation of those relationships while going through this process. To understand another’s perspective is a lot easier within the constructs of a good working relationship. Finally, I learned how much I enjoy engaging in conversations about the facility with our staff. I feel I have a lot to learn from the various members of our team. I am encouraged by our staff’s sources of motivation, the level of dedication they show each day to the facility (and to each other!) and look forward to continue these discussions on a quarterly basis in an attempt to make the facility an even better place to live and work.



John K. Jones

Organization: Judson Services, Inc.

Title: Vice President of Judson Manor

Name of ALP: Virtual Patient/Physician and Connected Learning Initiative

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

As we are all aware, technology advances play an integral part of providing programs and services to those we serve. Looking ahead, technology will be even more vital in our industry. History has proven that the aging services industry has struggled at points to find qualified and culture sensitive

workers. As baby boomers come to us, this population will increase while our work force (including gerontologists) will be stretched to meet these needs and demands. Through technology, we can bring many efficiencies and be able to serve these individuals more effectively.

Judson has been on the cutting edge on many initiatives and this project will certainly keep with that tradition. This will definitely keep with our mission and values and improve overall quality for those we serve.

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

1. Create data collection measurement tools to verify that the virtual physician/patient arrangement will reduce healthcare and associated costs
2. Enhance educational programs for residents
3. Enhance Judson's health and wellness program thru virtual wellness education and instruction
4. Become a content provider for #2 and #3

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?

Judson Services, Inc. will be my sponsor along with Judson's President/CEO, Cyndy Dunn, who will also be my mentor. Judson has made a financial commitment of \$25,000 towards this initiative and if, necessary, will entertain additional funding if justified. Periodically, I meet with Cyndy or provide written communications giving updates on the progress of the project and will continue to do so.

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

There are many partners in this project including Case Western Reserve University (CWRU), University Hospitals, Cleveland Museum of Art, Judson affiliated physicians and Joan Pagano (Sr Fitness Trainer). There is also an established Resident Advisory Board that meets periodically to oversee this project and make sure it stays on task.

In early May, most partners met to discuss next steps which included:

- a) Reach out to CWRU psychology professor TJ McCallum to create a data collection tool that will be useful in trending not only potential cost savings with these initiatives but also measurements on how these initiatives impact quality of life
- b) Finalize connectivity for our second campus (Judson Park) as well as connectivity with Joan Pagano in NYC
- c) Establish a roster of residents and authorization from them to participate in this pilot project
- d) Create curriculum for health and wellness component
- e) Establish help desk procedures for IT issues

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

I have certainly attempted to apply some of the leadership qualities that I have learned thus far. I now know that I don't have to have all of the answers and the importance of surrounding myself with others that have the expertise in certain areas in order for this initiative to be successful. It takes many hats at the table in order to wrap our arms around what is necessary in order for this project to get ramped up. I have learned to be a better listener and to be open to other ways of doing things (not just my way).

Based on the number of players in this initiative, collaborations and partnerships are extremely important in achieving goals for each participant as well as collectively.



Katie Kasper

Organization: Wesleyan Village, Elyria, OH

Title: Director of Nursing

Name of ALP: Cardiac/Ortho Transitional Care Unit

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

My true inspiration for this component of our skilled nursing facility is the growing need for specialized care in the areas of cardiac and orthopedic services. With hospital stays shortened and individuals being discharged very shortly after surgeries there is the growing need to “fill the gap”

with highly specialized, creative care that truly focuses on the individual. By creating a specialized unit for both cardiac and orthopedic patients the Wesleyan Village will be impacted greatly – not only for the residents who reside on the campus but for the community to have an innovative and expert group of professionals to serve them with these specialized services. The goal with the individuals who participate in the program will not only be to meet their medical and rehabilitation needs but also to take it a step further and offer programs to enhance their knowledge and participation in their health and wellbeing. Such programs will include nutritional classes with cooking demonstrations, smoking cessation programs, stress reduction and other wellness enhancing programs and services. The success of this ALP will impact the Wesleyan Village with a full census, positive reputation in the community and increased revenue to continue our mission and enhance services that we provide.

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

1. To make the Wesleyan Village the primary consumer choice for post-acute care of orthopedic and cardiac services. Therefore being considered the main community resource and expanding upon that to continue to have community educational events, including offering the most updated information and seminars about both cardiac and orthopedic procedures. In addition the Wesleyan Village will continue to offer nutritional counseling and preventative screenings.
2. To increase staff education and awareness of cardiac care and orthopedic care – having our staff be successful in the delivery of care, with advanced education in the areas of cardiac and orthopedic specialties.
3. To increase census of the skilled nursing 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?

The sponsors for this project are the executive team members at the Wesleyan Village. Multiple conversations, meetings and brain storming sessions have occurred with this group of individuals. Following up with this team will continue in not only structured meetings but also as new challenges arise.

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

There are many steps to accomplish this project, from large scale structural and cosmetic changes to completion of competencies for staff. One of the challenges and current focus is changing the culture of how we think of a skilled rehabilitation resident and engaging our staff to think creatively to enhance the stay of these individuals. Competencies and certifications of the staff are currently being finalized to ensure expert care is delivered.

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

During this project I have seen the importance of partnerships, not only the partnerships from the community but within the organization. As a major project emerges in one department, it is vital to have those partnerships with other departments. During this project my relationships have grown with other departments, sharing ideas and knowledge, coaching each other and holding each other accountable for completion of this project. The sense of community and teamwork is enhanced which in turn enables us to make this project successful.



Stephanie Keaton

Organization: Sunset Village

Title: Community Builder

Name of ALP: Unlock the Doors to Unlock Your Heart

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

I noticed that elders of our memory care household (a secured household named Finlay) were living with one purpose...to “break out” of the household and become “free.” It bothered me that they did not feel as if they could “freely” live their lives. I would come home at night and imagine the same

four ladies standing at the Finlay Court doors, just waiting for their day to “escape.” It made me question what kind of worth we put on these people’s lives, and is it possible to engage them some other way? Over the years, we have reduced our industry of restraints and alarms. I think the next step in our evolution is getting rid of alarmed doors. One day we will look back and be disgusted that we held people like this, just the way we look back at physical restraints, with disgust.

This goal at this point is still only a goal. Anyone working in the long term care sector understands that you cannot just go unlock the secured household doors. That being said, we have made drastic changes. When we began, we experienced great backlash from staff, but I am hopeful that our team is catching on now and seeing the light. In each meeting, I use the phrase, “Do the right thing,” and it seems to hit home with our employees. I think we can all agree that the wrong thing is keeping these people locked up.

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

The ultimate goal is unlocking the doors. Sounds crazy, doesn’t it? I know that in my lifetime, I may never see the doors unlock, but I still want to be a pioneer and put the idea out there and hope that some leaders hear me. My realistic goal for now would be that elders do not have the sole purpose in life of “escaping” a household, and that staff don’t think of it as “escaping.” My goal is to help staff understand that the elders need to have purpose in their life and have the right to be engaged in life, despite dementia. And instead of “breaking out” of the household, or “escaping,” my hope is that staff members start to think of these actions as “bored, curious, anxious, wanting to take a walk, or experiencing a need that is unmet.” My goal for now is to help co-workers and staff reconsider what a memory care household really is, while improving the lives of those that live 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?

I do not have a sponsor yet.

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

My next steps are to have household meetings with staff and especially the lead nurses of the household. Believe it or not, the nurses are the hardest ones to get to buy in. They believe the elders should stay put in the household, and I even had one nurse tell me that this idea was wrong, and they don’t need to leave the household ever. I realized at that point, how frustrating this challenge would be. The aides are more on board than some of the lead nurses, which is both disheartening, and reassuring to me. I think the best thing I can do is to continue to have household meetings and to communicate the vision and get their buy in. I have found that sometimes nurses are so clinical, that they can’t see beyond meeting the medical needs of the residents. It is my job to look outside the box and to be creative in order to ensure that elders are living their best lives possible, dementia or not.



Jackie Kissing

Organization: Otterbein Senior Lifestyle Choices

Title: Manager, Human Resources

Name of ALP: Safe Resident Handling and Movement Program

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

I was inspired to implement this program as a solution to our caregiver resident handling and movement injuries. This program will reduce injuries to our partners and promote a healthier work environment. In addition to creating a healthier work environment it will reduce cost

associated with work related injuries.

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

- Reduce the number of handling and movement injuries by 40%
- Reduce restricted work days due to handling and movement injuries by 30%

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 Jill Hreben, President/CEO Otterbein Homes. We have talked. Jill is committed to improving the health and wellbeing of our partners and creating a best in class workplace. I keep Jill apprised of my progress through my weekly Workers' Compensation reports.

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

I have rolled this program out, with the help of the Assistant Director of Clinical, to all five of our Lifestyle Communities. Three of these communities are completely up and running with the new program. The other two are in the process of training their staff with rollout expected in the next few months. Next we plan to bring this to our Skilled Nursing and Rehabilitation Neighborhoods, Home Health and Hospice organizations.

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

I learned that I am a "creator" and "influencer". In order to get this program off the ground first I had to do extensive research on handling and movement programs. Next I used that information and my passion for protecting partners to influence the organization's leaders. My story appealed to the leaders mind and hearts – accidents can be career ending to our caregivers. Because I had developed a level of trust based on my past performance, competence and character, I was given the green light to move the program forward.

In addition, I have learned that communication is critical. Communicate the message nonstop; use every opening to insert the message. You will know that you have been successful when you hear others quoting the message in their communications.



Judy Miller

Organization: Kendal Northern Ohio serving Kendal at Oberlin, Kendal at Home and Kendal Northern Ohio Community Outreach, LLC

Title: Director of IT/Accounting

Name of ALP: Kendal at Oberlin

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

To provide a secure Campus Wide Wi-Fi system in order to accommodate new and existing resident needs, allow staff to have access to the network anywhere inside and outside the building and allow

resident family and visitors access to the Internet when needed.

Background: Kendal at Oberlin was established in 1993 as a not for profit Continuing Care Retirement Community serving the elderly. Founded on Quaker values, Kendal at Oberlin offers older people a vibrant, diverse, caring community, encouraging individual lifestyles by promoting independence, continuing learning, Civic involvement with the wider community, social relationships and excellence in healthcare.

As we look at technology and how it has become an integral part of our daily lives, we also need to consider how technology affects our present and future residents. Social media and the Internet have become key in areas of marketing and advertising. Current residents and the next generation of residents coming into our community have high expectations about the services they desire. Our resident of the future will be increasingly “tech savvy” and have the need for increased access and bandwidth.

More and more, systems that we use on a daily basis in our independent units as well as our assisted and skilled units (nurse call, wander management, etc.) are now being upgraded to include wireless. Applications that are used by our staff for maintenance, environmental services, etc. are also being upgraded to wireless systems for increased efficiencies. We want to be able to provide service to all anywhere on campus. We want to deliver service fast and effectively regardless of where it is on campus.

Name of ALP: Kendal at Home

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

Invest in technology - Redefine independence in member homes utilizing a holistic, enterprise telecare and social engagement solution for members in their homes;

Background: Kendal at Home offers a wide range of options designed to promote successful aging for members of diverse ages, lifestyles and financial means who want to remain in their own homes. Embracing Kendal's unique set of Values and Practices, Kendal at Home fosters a unified spirit of community and collaboration within the organization and the field of aging.

As our population lives longer and long term care becomes increasingly costly, more elderly individuals are choosing to remain in their homes – rather than seeking care in a facility – and are looking for community services and assistance to make this possible. Kendal at Home's design is focused on individuals that have chosen to “age in place” and remain in their homes.

The great promise of technology is that it increases feelings of connectedness to families and caregivers and that it increases independence and autonomy by improving interconnectedness.

This emphasis on technology will do more than simply provide high-speed connections and wireless ease; technology holds the promise of keeping individuals healthier, more independent and socially connected.

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

Kendal at Oberlin has recently completed their first 10 year long range master plan. In preparation for planning for the second 10 year plan, Kendal engaged consultants to perform a market study to look at various areas of interest/improvement campus wide. According to a recent panel discussion of the nation's leading marketing professionals regarding prominent retirement communities, wireless access to Internet services was the amenity young seniors wanted to see the most.

Technology plays an important role in the day to day operations of Kendal for staff, residents, visitors, etc. Our next generation of residents will have high expectations as it relates to access to the Internet for a variety of devices and applications. Software used by staff has also become available for use on portable devices with wireless access.

The satisfaction of our resident population as well as the efficiency of our staff is essential for Kendal at Oberlin's success. The implementation of a campus wide wireless infrastructure positions us well to meet the future needs of residents, staff, family members, vendors etc.



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

Kendal at Home: Aging in place is a popular means of spending retirement among today's older adults. Issues like social isolation and the possibility that someone's condition will deteriorate, however can make the option of "aging in place" a concern for loved ones who may live a distance away.

By exploring technology options, it allows members to enjoy many of the same benefits of a residential community while empowering them to remain in their homes.

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

Kendal at Oberlin:

- A Master Planning Committee has been created and information has been provided regarding needs of this project.
- Initial contact has been made with the Contractor and Engineering companies to begin discussions and create a Scope of Work for the project
- Provide a secure low or no cost wireless option for current and future residents
- Provide campus wide wireless – including surrounding outside area to increase staff efficiencies as it relates to grounds, facility maintenance, etc.
- Provide a reliable, secure, expandable wireless infrastructure that will position Kendal at Oberlin to meet the needs of residents, staff, visitors, etc. well into the future

Kendal at home:

- Provide benefits of a residential community while empowering older adults to "age in place"
- To have members remain engaged socially with family members, caregivers, etc
- To ensure the safety and security of members that are "aging in place".

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?

Sponsor for Kendal at Oberlin project: Joe Savery, Director of IT – The Kendal Corporation. Joe and I have met on several occasions – both in person and via phone call regarding this project. We have met with several vendors together as we move towards the Request for Proposal process, determining the scope, design and phases of the project.

Sponsor for Kendal at Home project: Lynne Giacobbe, Executive Director – Kendal at Home. Lynne and I have met both in person and via phone call regarding this project. We continue to communicate on a regular basis as the project progresses.

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

Kendal at Oberlin:

The following areas of the project have been completed:

Meet regularly with the Master Planning Committee related to the on-going projects; Engaged Reese Engineering to assist with defining the Scope of Work for the project; Site visit with Reese Engineering to survey existing conditions on campus relative to the scope of work; Meet regularly with resident population regarding project updates; Received preliminary construction documents related to the fiber optic layout (design) to be included in the final RFP; Researching potential providers for bandwidth and resident support.

Next Steps:

- Finalize documents from Reese Engineering related to the Wi-Fi infrastructure Scope of Work;
- Identify potential contractors for RFP process;
- Continue to communicate with Sponsor regarding project updates

Kendal at Home:

The following areas of the project have been completed:

Vendor has been selected; Pricing options have been reviewed; Terms have been determined

Next Steps:

- Create Implementation Timeline;
- Determine eligible members;
- Schedule staff training;
- Schedule deployment of equipment and software

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

Communication and follow-up is a key factor to successful project implementation. Delegation of duties with a regular schedule of updates back to the team is important; Making sure all involved are kept apprised of the project Staying organized and focused.



Mike Miller

Organization: National Church Residences

Title: Healthcare Accounting Manager

Name of ALP: Accounting/Finance Software search and conversion

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

National Church Residences Healthcare has wanted to find a new Purchase Order software system for some time. The system we are currently using is an in-house system that does not meet all our needs. I was looking into new Purchase Order systems and did not want to invest that much money

because our Housing Division was trying to get National Church Residences to budget funds to upgrade and integrate all of their financial software systems. National Church Residences has a lot of in-house software systems, for things like cash management, fund accounting, PO tracking, capital tracking, assets, budgeting, and reporting. The Healthcare Division has been using the same financial software the Housing and Corporate Divisions have been using. I would also like to upgrade and integrate all of our financial software in Healthcare as well. So, I started working with the Housing Division to develop a RFP for software companies. It turns out that our Housing division is already using some software from a company that specializes in property management software, Yardi. They would like to use Yardi for all their software needs.

With my past experience in software searches & implementation I decided to take the lead on this project for the Healthcare Division. The impact for National Church Residences Healthcare would be to have a fully integrated software system. This upgrade will impact the organization by allowing us to be able to close the monthly financials faster which will allow Management to be able to make more timely decisions and enhance their ability to manage their buildings.

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

The goals I hope to accomplish are to have a fully integrated software system. Our current GL and AP software does not have drill-down capabilities. The ability to have drill-down capabilities, detailed security and the ability to attach scanned documents will allow National Church Residences Healthcare to go paperless. With the new drill-down capabilities, the ability to attach documents and the needed security will allow us to give managers access to the system. The managers will have the ability to run the reports they want to see, drill down on those reports to be able to find out what caused the expenses and see the actual invoice with signatures.

Being able to close the monthly financials faster will allow Management to be able to make more timely decisions to be able to manage their buildings.

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 the Healthcare division. My supervisor and I have had multiple discussions as the process had been developing. We will continue to have discussions as the process continues to unfold.

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?

My supervisor is my mentor. She continues to ask the questions that make me think about the process in a different way, similar to the Innovator's DNA, questioning the unquestionable, asking what if, why not.

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

We have had Yardi come out and interview staff that will be involved in the new software changes. We have had meetings with the Yardi technical staff and our staff to discuss every software modular we have. We discussed how each modular is used, how the data populated the field and how that data were used within other modulars and/or within the organization. Yardi took this information and came back to us with what they felt they could replace with software they had and what parts of our software systems they could not help and we would have to continue to use or look for other ways to track that data. The next step is to take this information and, working with Yardi, determine what the best way would be to set up their modules with ours and how this set-up may change the way we currently do our daily processes. Then it will be time for implementation, writing procedures and training. For the Healthcare Division we think this process will take over a year.



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

I have to build and strengthen my partnerships with other divisions of our organization. We are proposing to replace three vendor master lists and three GL charts of accounts with one for the whole company. We are also hoping to replace a lot of our in-house systems, changing the way staff complete their jobs and what their reporting will look like. Major change like this can make people very uncomfortable and the partnerships I form will help make change go smoother and allow staff to feel less anxiety.

I have learned that I am taking bumps in the road much better than I did years ago. In the past when there were bumps in the road or I had major change coming I would get stressed out and I was reflecting that stress to my staff, other colleagues and my family. I feel that I am handling the stress much better and not showing the stress I may feel to other colleagues. Most everything about this project will be a change: the way staff will do their jobs, new software to learn, new GL codes, new vendor lists, new procedures, and so on. If I am stressed out about the project then how can I help control others' stress levels?

I am also continuing to work on my listening skills. I have to understand how the set-up of the new software will affect other Divisions as well as for Healthcare. Without listening skills it would be easy to overlook how the changes will affect others. We would not be able to get a new global software system setup if everyone is not working together and understanding the needs of the other divisions. To understand others' needs better I have been using softball questions. I continue to remember that I do not need to know the answer to all the questions.



Kara Serger

Organization: Eliza Jennings

Title: Vice President of Human Resources

Name of ALP: Staff Training & Development

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

There are a couple of reasons why I chose staff training and development as my ALP. Currently, we do not have a position dedicated to offering training in our organization outside of our SAIDO Learning program, so I am happy that the Leadership Academy incorporates an ALP which has encouraged me

to prioritize working on this organizational need. In addition, feedback from our employee satisfaction surveys has informed us of the great necessity to provide opportunities for growth and development for our staff that goes beyond basic skill training. We are fortunate to have a lot of great employees who enjoy working for us, yet, sometimes we lose them because they are limited in their growth potential with us because they do not qualify for other positions or because we are limited in offering career advancement opportunities. I believe focusing our internal training efforts on professional development will position staff so they are better qualified to advance in careers with us and in turn, build a stronger workforce and reduce our turnover rates.

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

The goals I hope to accomplish include:

- Demonstrating to staff that we value their employee survey feedback and follow up on suggestions
- Improving staff relationships
- Boosting morale through improved job confidence
- Quarterly leadership training presented by our Employee Assistance Program
- Behavioral interview training presented by the Cleveland Employer Resource Council
- Implementing a Resident Assistant Advancement Program
- Training our HR directors and myself on leadership topics so we can educate the rest of our organization
- Developing new leaders
- Further developing current leaders

Who will be your sponsor? Deb Hiller, CEO. **Have you had a conversation with this person?** Yes.

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

I communicate with my sponsor at least monthly through email and in-person meetings. I am also communicating regularly on the progress of our staff development and training efforts to our senior management team and working directly with members of our operations team (which includes our community/service executive directors) to help implement.

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

I feel one of the most important next steps is to create a training calendar for the remainder of the fiscal year. I will plan this calendar with input from our communities/services regarding their staff educational needs so my efforts are valuable. This sounds like a simple task, but having this tool will ensure follow through on my ALP.

In addition, in mid-September, I will receive the results of this year's employee satisfaction survey. I will use the feedback from it to examine whether or not improvement has been made in the area of professional development, if my ALP efforts are beneficial, if there are continual training needs, and if so, what those specific training needs may be. This important feedback will help me accomplish my goals because it will be used to focus efforts on offering professional development opportunities that staff desire.

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

So far, I have learned that it is essential to maximize the resources you have, especially when they are limited. Additionally, it's definitely a collaborative effort to accomplish big tasks. It is very difficult to be successful if you're a "one man show." I'm also realizing how much I can accomplish through prioritization. Making staff training and development a priority was essential in the success I've had so far. The small success I've accomplished at this point is motivating me as a leader to do more which is not something I figured would occur. Originally, I would have thought some accomplishments in this area were sufficient and may have stopped at that point because the task was technically off my "to-do" list. Finally, what I've learned about myself is that I wish I had more time in my position to lead. Based on my role, I am a leader in the organization, but quite often I get bogged down with daily HR administrative tasks that are required to be accomplished and I don't get to spend the majority of my time on what I enjoy most which is lead.



William Solivan

Organization: Kendal At Granville

Title: Director of Resident Services

Name of ALP: Improve the new resident move-in process

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

Doug Helman, our Executive Director, was sharing his vision of how a new resident should transition to living in a retirement community. After our conversation I was inspired to take on the task of evaluating our current procedures and developing new procedures that will help new residents

transition smoothly to life in our community.

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

Work with the Marketing Department to identify how to smoothly transition new residents from the contract process to the move-in process. Once this transition has occurred, develop a system for residents to work with a move-in coordinator to choose options and upgrades and manage all changes pertaining to their residence. This move-in coordination process will assist the resident with their needs through their move in date and follow up with the resident to make sure everything is going 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?

My Sponsor will be Doug Helman. Yes, we have discussed the project in detail and follow up regularly with each other regarding the progress of the project.

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

We have developed a job description and hired a Move-In Coordinator. I have evaluated our current move in process and started developing a list of tasks for the new move in process. Currently, I am working to develop options and upgrades lists to help with resident selections. I have been working with the Marketing Department to help determine how to smoothly transition a resident from contract signing to the move in process without them feeling as if they are not important to Marketing. **What are you learning about yourself as a leader during this process so far?**

I am learning how difficult it is for perspective residents to make this life changing decision. I have a new appreciation for the emotional and physical impact a move to a retirement community is for new residents. This revelation has helped me to communicate more effectively and openly with residents and be more aware of their needs. It has allowed me to interact with residents early in the process which helps me lead my staff in a more positive direction when attempting to satisfy the resident.



R. Emerson Stambaugh

Organization: The Deupree Cottages, Episcopal Retirement Home, Inc.

Title: Health Services Administrator

Name of ALP: Adverse Event Management & Communication

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

Episcopal Retirement Home is consistently looking for ways to better serve and care for our residents. In the event of an adverse situation it is very important to react to care for the involved resident. It is also necessary to be both proactive and reactive with communications with all those

involved. Effective communication is also a necessary part of managing the event itself.

As my ALP I will be initiating the ECRI Institute Tool Kit, Effective Event Management. Successful implementation of this program will give ERH the knowledge we need to manage an undesirable event, communicate effectively and learn from the event to better ourselves.

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

My goals with this program are to create an interdisciplinary team who would likely be those involved in managing an event. I will have this team do an exhaustive review of current policies and procedures. We will role-play an adverse event and determine our opportunities for improvement. In addition, I will add to our current drills to extend them, offering actions to resolve the situation for the resident not only to the in-house staff but also both proactively and reactively to outside parties who are demanding information and possibly putting forth false information. I plan to have this level drill on an annual basis.

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 the Laura Lamb, Vice President of Healthcare and Hospitality. I have shared the ECRI Institute program with her and she is supportive of it. I plan to initiate the program this Fall and include staff from the many different disciplines who would be involved in managing an adverse event. This would include staff from frontline to the CEO.

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

Previously I have attended a two day workshop presented by the ECRI Institute. This has provided excellent ground work which I will adjust to fit our culture. Upon receiving the ECRI Tool Kit this Fall I will begin to move forward with the project.

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

This ALP will demand that I raise my attention in the organization to a balcony level. I know that I am great on the dance floor completing needed tasks and helping those around me. I do this sometimes to a fault not allowing me the time and energy I need to bring myself to a higher level. Leading this initiative will require that I lead people of all different backgrounds and capacities, thus making me a better leader.



Cindy Sturgell

Organization: Wesleyan
Senior Living

Title: Director-Village Center & Masterpiece

Name of ALP: Creating a Successful Aging Culture

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

Our community partnered with Masterpiece Living in May 2012. At that time our focus was directed to our Independent Residents to enhance their quality of life through successful aging. In the past year I realized the 10 year research by the McArthur Foundation adopted by Masterpiece Living is very valid and it needs to become part of the culture throughout our community.

Changing our culture will enrich the lives of our Residents and staff as well. It will move our focus from just keeping individuals safe, comfortable, and entertained, to a vibrant community that engages life and encourages growth and successful aging at any age. It will also position our community to be ready to attract the next generation of retirees who will be looking for more than a just place to grow old but a place to live and enjoy their life to the fullest.

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

All areas within our community actively involved in the support of a successful aging culture through spiritual, intellectual, physical and social programming, services and interaction.

Residents throughout our community more engaged in life, making lifestyle choices to fulfill their desired goals and having the opportunity to age successfully within a supportive community.

Who will be your sponsor? 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?

Mike Rogan, CEO-Wesleyan Senior Living - *Sponsor*

Debra Cihla, VP-Chief Human Resource Officer - *Mentor*

I met with Mike Rogan, along with our Executive Team to discuss creating a successful aging culture and the importance it has on current and future Residents.

In the past two months, I have met with our Management Team to discuss and train them on how MPL can have a positive impact on our community. Our mission statement has been revised to include the four components of MPL and the Manager Team has been involved in the MPL process with our Residents.

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

In the next several months, I will be meeting with managers throughout our community as well as Residents to discuss ideas to enhance our culture through successful aging. The outcomes of the meetings will be discussed monthly with our Management/ Executive Team.

Training of all staff on our new Mission Statement, the Successful Aging Culture and their role to encourage and support our Residents goals.

Revise all staff job descriptions, goals and evaluations to include support of the new culture.

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

I have been successful in tackling many new job responsibilities over the years by incorporating changes within my own departments utilizing staff skills and abilities to help in the transition.

I have realized I do have the ability to make significant changes within our community by developing partnerships with our Management team. Understanding their personalities and skills, initiating conversation and asking for their ideas, is a key to helping make the change positive and successful in our community.



Steven Throop

Organization: National Church Residences - Legacy Village

Title: Executive Director

Name of ALP: Memorial Garden

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

The company acquired an historic building in poor condition. The building needed to come down. Upon hearing the history of the building as a hospital for an orphanage there was a felt need to memorialize this building. The garden will allow our company to provide a place for the alumni of the

orphanage to remember the history of this building along with current and future residents to have an outside gathering place with historic plantings dating back to the early 1900's.

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

Bring the orphanage alumni, our company and our elders at the this site together as a group to increase communications and future collaboration between these groups brought together by the purchase of the property.

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?

Jerry Kuyoth, COO National Church Residences. Mr. Kuyoth has approved the plan along with funds for contracting with Landscape Architects. Follow-up is made through phone calls and emails.

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

Several meetings have happened to this date. Our next meeting will be on 9/12/13. We will be meeting to approve final plans for the drawings and choosing items such as types of memorial monuments, seating and shelter structures. Discussions about fundraising for specific gift opportunities of benches and memorials will also be discussed.

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

Listening to others is very helpful in getting consensus with ideas of third parties which can then lead to compromise and eventual progress toward the teams shared goals.



Stacie Ward

Organization: United Church Homes dba Patriot Ridge Community

Title: Administrator

Name of ALP: Eden Alternative

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

Being somewhat new to the industry of Long Term Care and not having any experience in the field, I always thought what a wonderful thing to go to work every day in someone's home. I also feel strongly that a home reflects the people who live there and it is important to be specific to them,

their wants and needs.

I feel this project benefits the organization because it sends a message to our community that people come here to live, not die, and that we as an organization provide an environment where human growth is not separated from human life.

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

For the residents it is providing the best possible living environment we can provide. For staff it is the empowerment and ownership of being a part of a larger extended family.

Making all residents feel valued, needed and less bored and lonely is the ultimate goal. The philosophy provides the opportunity to do things that we find meaningful, which is essential to human health. Eden Alternative helps us create for our residents an environment of genuine human caring!

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 started with plenty of research. I read several books on Eden Alternative and also visited a few communities that have Eden Alternative certification to see how they approached the philosophy. I have one administrator in our organization who is an Eden Alternative Care Partner and she has been available to answer questions through e-mail, phone calls or when we are at conferences together.

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

The first step is educating staff, families and residents on what the Eden Alternative is and how we can all help to create a loving, caring, spontaneous and inviting community for everyone. It is important that all parties are included in the planning and decision making.

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

I have learned that it is essential to empower staff with choice and responsibility. Their ownership and dedication to a project this large is crucial. I have to be a good listener. I have also learned that if you have a good idea and you try it and it doesn't work it doesn't mean it wasn't a good idea; you just have to use trial and error until it works for you. The way some communities have implemented their Eden Alternative projects may not work here and we have to work through the process together. Finally I have learned that I'm not alone and my team supports me as I do them; we all require extended family; we all need to be needed and feel valued and feel as though we are making a difference.



Sue Welty

Organization: Ohio Presbyterian Retirement Services Foundation

Title: Vice President of Gift Planning

Name of ALP: Fundraising Model: Home and Community Based Services

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

The OPRS Foundation has been a leader in long term care fundraising for many years and with the continued growth of Senior Independence, our home and community based services company, the time is right to expand our fundraising efforts. We have strong support from corporations,

foundations and government grants for our homecare, home health and adult day programs. Now it is time to enhance our fundraising efforts and give home health and homecare clients and their family members the opportunity to make a charitable gift in support of the many programs and services they received. Letters arrive daily from individuals who are so grateful for their care or the care of a loved one which was made possible by Senior Independence.

Senior Independence currently serves over 95,000 clients in 41 counties throughout the state of Ohio and is continually growing. Over the next three years, we will partner with operations to develop and test a fundraising model for home and community based services. The impact on the organization will be both internal and external. Internally, our staff will have a greater awareness and understanding of the role philanthropy plays and the impact they are making every day in the good work they do. Externally, a successful fundraising program will raise additional dollars to enhance and support the many programs and services we offer.

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

First and foremost, my goal is to develop a successful fundraising model that will enhance our ability to provide charitable dollars to support the home and community based services programs of Senior Independence. My secondary goal is to provide a model that can be utilized by other organizations facing similar opportunities and challenges fundraising in this 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 is Tom Hofmann, President of the OPRS Foundation. Tom and I partner in leading the Foundation. The development and implementation of this program is important to the continued growth of the Foundation. It is one of the seven key elements as an organization we will be focusing on over the next three years.

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

Over the next three years we will implement the program in phases: Phase One - Building the Infrastructure. This includes laying the groundwork for future success and such things as creating case statements, establishing a database and developing external and internal communication plans. Phase Two: Building Relationships. Nothing is more important in fundraising than building relationships. During this phase, a Gift Planning Director will be hired to focus on building relationships with individuals touched by Senior Independence to seek charitable support. Phase Three: Building Partnerships. This phase includes reaching out beyond our clients and family members to build community partnerships for charitable support.

Action steps have been developed for each phase of the program. Currently, a leadership team is in place to guide the program and workgroups are being established to begin implementing the action plan. Ongoing reporting and evaluation of each phase and action steps will be critical to reaching our goal of developing a fundraising program for home and community based services.

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

With the size and significance of this project I quickly learned the importance of leading and not managing or “controlling” every aspect of the development and implementation of the program. Looking at the bigger picture, creating a leadership team and an agreed upon “Road Map” provided the framework to begin developing and guiding the program. I learned I needed to recruit managers to oversee each of the key components of Phase One, and give them the authority and responsibility to put together teams to implement the plan. Stepping away has also helped me be more open to new ideas and new ways of doing things.

I have learned it’s hard to give up “control” but I have seen the commitment and excitement of teams pulling together to reach a goal. It is clear to me the “balcony” is where a leader needs to be and not on the “dance floor” to be most productive. It has been a joy watching the managers build their teams and develop plans.



David C. Zack

Organization: Otterbein Senior Lifestyle Communities - Lebanon

Title: Healthcare Administrator

Name of ALP: Nursing Assistant Retention

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

Like many organizations, Otterbein is challenged with turnover of front line workers, particularly State Tested Nursing Assistants. Surprisingly, my alma mater struggled with retention of students.

Before 2010-2011, The College of Wooster had retention rates in the mid to high 80 percent range. In

2012, Wooster achieved a retention rate of 90 percent. Retention matters because it is the most visible, tangible, and meaningful measurement of the holistic health of an organization. It measures how well we are serving our partner-employees and in this case, every partner matters.

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

The goal is to take the lessons learned by Wooster and adopt them into the senior housing and long-term care setting. By adopting the practices and programs developed by Wooster, we hope to see retention of partner-employees, particularly front-line workers like STNAs, improve. Our turnover rates are measured on a regular basis, and base-line data has been gathered for this project.

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?

The College of Wooster appointed an associate dean-level position dedicated to increasing and stabilizing retention rates. Robyn Laditka serves as the associate dean of students for retention and academic engagement and will serve as a resource as we develop our program.

Communication with Robyn has occurred on several occasions, and we will be keeping in contact at least monthly. There has been talk about the possibility of having Wooster conduct training for our team at Otterbein Lebanon.

Who have you selected as a mentor?

I hope to be able to mentor others in this process, and will even want to expand the program beyond Otterbein-Lebanon.

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

Creating the sense of urgency is the first step in accomplishing this goal. Gathering support for the program from senior leadership is also a key first component. This type of program and partnership requires "thinking outside the box," and building a team to support the programs will be important.

We will also have to identify program objectives, determine programs costs, implement training, and develop monitoring/auditing tools.

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

I am learning several valuable lessons as part of this project.

First, trying to lead from the balcony and not get dragged onto the dance floor has been challenging. There are many facets to this recruitment and retention program, and ensuring each member of the team is fully invested in the process is vital to the success. I have to pull together individuals to work together to accomplish the goal. Communicating with the team, motivating the group and continually moving the ball forward has been exciting and a learning experience. It has not been easy at times, as everyone is busy with day-to-day operations, but as the leader of this project, I myself have had to stay focused in order to keep the team focused on the goal.

It has also been personally and professionally fulfilling to connect with The College of Wooster. I am excited to be forging a partnership with Wooster and hope there can be continued collaboration with the institution.

Change management is another area in which I am learning a great deal. Making the change stick is going to be important as we fold this program into our culture of partner-employee recruitment and retention.