

LeadingAge™
Ohio

leadership academy

2016 Action Learning Projects



Partners:





Jason Bright

Organization: Link-age

Title: Director of Business Development

Name of ALP: Writing a Guide to Purchasing for Senior Living Providers

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

Since beginning my career at Link-age, I have had many discussions with long term care providers to learn about their purchasing processes. During these meetings I have spoken with all levels of staff in many of these organizations, from the individuals responsible for procurement to the Chief Executive Officer. I have learned that all of these organizations desire to make efficient purchasing decisions, but often times, they are not. By simply changing some of their strategies, they can save as much as twenty percent!

There is often a major difference in opinion regarding purchasing between the senior management of senior living organizations, and the employees who are actually doing the purchasing. The senior management teams often believe that “their procurement teams know best, and are making the most cost efficient decisions for their organizations.” What I have found is that the purchasing staff is often making decisions based on relationships with vendors, personal preferences, and not considering all of the facets when making their decisions. As a result, even though the senior management believes they are getting the best deals, often times they are not.

This project will bring exposure to Link-age when senior living providers read this document. The guide will be used as a “leave behind” for Link-age sales staff to share with prospects, which I hope will get them thinking and want to consider how Link-age does things much differently from other purchasing organizations.

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

My goal of providing this guide is to help senior living providers purchase items more efficiently. The guide will be written for all levels of staff of senior living organizations, and help them key in on important topics for consideration. By bringing these ideas to the attention of all involved, it will help them all to think alike, and work together to achieve the best results for their campus. This guide will walk readers through the steps involved when comparing vendors and purchasing programs. It will include examples of how providers have saved money using the recommended techniques.

My hope is that as people read this guide, they will see the expertise that Link-age has in the purchasing arena, and see that we do things much differently than other purchasing organizations. I hope that they adopt some of my suggested tactics, and work with the Link-age team to receive benefits they are not obtaining from their current providers.

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?

Scott Collins, President and Chief Executive Officer of Link-age, is serving as my sponsor. Scott is extremely dedicated to his employees and supportive of our development. I will rely on Scott’s knowledge and expertise having worked many years in this industry to guide me and help me to develop this guide.

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

To prepare this guide, I will do quite a bit of research. This will be done by interviewing several people, including successful procurement staff, vendor representatives, and Link-age staff. I am anxious to get into print what these people do to generate the most savings, while at the same time, guarantee the highest level of service and the best quality products.

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

Since beginning my project, I have learned that I know a great deal more about this industry and process than I realized. As a result, I have a new level of confidence which allows me to question processes that people utilize, and share ideas that I have learned from other organizations. I appreciate being able to offer them assistance, versus just selling them a product or service.



Lisa Burkhart

Organization: Friendship Village of Columbus

Title: Executive Director

Name of ALP: Key Leadership Performance Scorecard

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

This project gives me the opportunity to develop our Key Leadership Team's leadership abilities. Having documented common goals will allow for the team to develop their priorities that are consistent with the overall community. Reviewing the measured goals routinely will improve communication and direction. It will allow for open discussions and feedback from everyone which will foster collaboration amongst the Key Leadership group.

The impact this program will have is giving the leaders of the community to opportunity to contribute to the overall success of the community. It will encourage team work and support of one another. It will allow them to develop and grow as a leader. Ultimately having a strong leadership team that functions as a unit will provide job satisfaction and increase longevity in the leadership team.

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

The goals for this project are to increase retention of the Leadership Team, foster collaboration and continue to develop their leadership skills.

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?

Chuck Mooney, COO of United Church Homes is my sponsor. He is aware of this project and has been reviewing the scorecard and metrics and providing feedback. We communicate often through email and phone calls mostly, but he does make random monthly visits as well.

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

The next steps are to finalize the criteria and measureable goals and then share those with the Key Leadership Team and to receive feedback. I will facilitate questions and expectations about the goals to determine the financial incentive to implement the program.

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

While I may have a clear understanding and vision of the path for the organization, it is important to have a team approach to determine the path. I need to include others to gain their views and knowledge. I need to ensure everyone understands the common goals, but allow each member of the team to be responsible and take their own path toward the common goal. It is important to have open and continuous communication on status. This will allow team members to see in real time the performance progress. It is all about the common goals, but the journey to achieve them need to be the team member's. This will also allow for ownership.



Alissa Clouse

Organization: United Church Homes

Title: Director of Major Gifts and Grants

Name of ALP: Living UCH Values Award

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

The Living UCH Values Award is organization-wide recognition for United Church Homes (UCH) employees who are at the heart of our communities. These employees understand our vision and mission, and express our values daily. When taking action, they do so with compassion, hospitality, respect, integrity, stewardship, and transparency.

I was inspired to choose the Living UCH Values Award for my action learning project as it aligns with two corporate strategies: to improve our employee retention, and to continue employee engagement with the vision, mission, and values. The action learning project will implement a new level of employee recognition that does not currently exist.

It will impact United Church Homes as staff will share ownership in the core values, leading to consistent mission driven interactions with all constituents. This will be implemented by drawing a direct correlation between the work that frontline staff provides and UCH values, demonstrating that each staff person can directly impact the larger vision, mission, and values of the organization. Key inspirational stories, behaviors we want modeled, and exemplary performance will be lifted up.

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

The primary goal of the program is for all United Church Homes staff to share ownership in the core values, leading to consistent mission driven interactions with all constituents. Authentic leaders will be identified and encouraged to empower others.

My personal goal that I hope to accomplish is to grow as a leader. This is being accomplished by facilitating a group process, as well as by providing inspiration/motivation to others to achieve goals and improve quality within the organization.

It is important to recognize employees who are performing values based work; it leads to a higher calling of care. Employees' shared commitment to excellence through teamwork, positive outcomes, and passion for caregiving and healing is worth recognizing.

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?

Rev. Kenneth Daniel, President and CEO of United Church Homes, is my sponsor for the LeadingAge Ohio Leadership Academy. Rev. Daniel's collaborative leadership approach lends to concerted implementation of new processes and programs, including with the Living UCH Values Award. His guidance and expertise has assisted in the comprehensive development of the action learning project. Follow up communication will occur regularly as new implementation milestones for the Living UCH Values Award are reached. Rev. Daniel will be instrumental in the rollout of the inaugural awards ceremony, as he will provide honors to those that are improving quality, values based contributions at United Church Homes.

Whom 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?

Gloria Hurwitz, CFRE is the Vice President of Advancement for United Church Homes and my mentor for the action learning project. She has been an avid supporter of the process by assisting in the development of initial ideas for an action learning project, as well as by providing feedback and steering me in a strategic direction with the Living UCH Values Award. As a strong supporter of my participation in the LeadingAge Ohio Leadership Academy and wide-ranging professional achievement, she will remain updated and involved in the progress and success of the action learning project.



leadership academy **2016 Action Learning Projects**



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

In order to accomplish the goals of my ALP, my next steps are to activate the implementation plan. I will continue to develop the details and the roll out plan with Scott Slutz, Vice President of Human Resources. The implementation plan consists of communication with UCH leadership, dissemination of collateral, and achieving engagement in the program in each of our healthcare communities, housing communities, and the central office for United Church Homes. Most importantly, engagement from a committee of leaders is needed to further develop the annual awards process, as well as, select and recognize awardees from the pool of nominees.

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

In order to succeed as a leader, constant growth and flexibility are needed. An integral part of growing is learning from peers. Working collaboratively throughout the action learning project and the Leadership Academy process has reinforced the value of team based approaches. I have witnessed that breaking down silos between departments and communities leads to better communication, creates a sense of community, reinforces engagement, eliminates duplicated ideas, and therefore drives results.

Additionally, I've learned the value of empowering our unrecognized leaders. By recognizing and engaging these individuals, we enable their growth and nurture potential. The Living UCH Values Award will empower these individuals invested in UCH's values.

I have learned that there is always room for improvement in the facilitation of group processes. It is encouraging to see results that are achieved when I inspire those around me to achieve goals and improve quality within the organization. Through conversations and knowledge from others throughout this process, I am able to implement skills learned and become a more rounded leader.



Elizabeth Craig

Organization: United Church Homes, Inc.

Title: Human Resources Field Support Manager

Name of ALP: Talent Acquisition – Eldercare Careers

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

I believe talent acquisition is and will continue to be one of the most significant challenges in the profession of healthcare. There have been many feast or famine periods in the recruitment of healthcare professionals. I have observed more recently a gradual and marked decline in direct care staff, (STNA/CNA). With the help of others within United Church Homes, Inc. staff and other professional networks, I have been able to reach out to other HR professionals to find they are experiencing the same steady drop in direct care staffing. These conversations and observations have inspired my ALP. United Church Homes, Inc. specializes in the care of our elders alongside many of our LeadingAge colleagues. As a result of this project, I will be able to communicate the advantages of working for non-profits specializing in eldercare, the diverse career paths within eldercare, and praise those already doing so. I hope to outline a practical and effective ongoing program that will allow UCH to become a leader in the promotion of eldercare careers. Also, I hope that it will create a ripple effect for all providers of eldercare services – increasing the quality of care through a well informed and passionate applicant pools.

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

I hope to offer a strategic plan for promoting our professions among healthcare professionals, support staff, and others whose experience and passion might be needed for eldercare. I will focus on three main areas to communicate the benefits of working with elders: Social Media/digital identity, partnerships with educational institutions, and internal staff relations.

Who will be your sponsor?

My sponsor is Scott Slutz, Vice President of Human Resources, United Church Homes, Inc. My sponsor is also a graduate of Leading Age Academy. We have had multiple conversations about this project. I plan to have multiple conversations as needed via phone, text, and email, as well as, face to face meetings weekly. Although I consider Scott Slutz my sponsor – I look to him as a mentor as well.

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?

Stacie Ward, LNHA, is my mentor. Stacie is also a graduate of the LeadingAge Academy. I have daily contact with Stacie. She is the administrator of Patriot Ridge Community. She is aware of staffing challenges and has been an amazing sounding board when I engage her in conversation on this subject. She and I communicate in many ways daily and I have all confidence in our ability to continue her mentor relationship with me.

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

The next steps of this project are to streamline a uniform message addressing the following themes: eldercare careers, wide variety of career paths, and the advantages of working with elders in a non-profit setting. The goal is to create a package of media and material that can be used on social media, interactions with educational institutions, and in communication with our current staff.

Next, once the message has been honed and the collateral material has been created, the goal is to start communicating with leaders throughout United Church Homes. Our leaders in the community must be included in this project. Giving the leaders tools, material, motivation, and the technology will help get the message spread further. I see this step as “mobilizing our base” of sorts. The message and promotion must echo throughout the communities to our front line staff. We must remind them of the amazing work they do and how proud they should be. It is important that all key stakeholders are included and take ownership in the overall message we are delivering.



As with the communication with our staff, my goal is to continue this message in direct interaction with various educational institutions. I will be focusing on the institutions near our communities first and reach out from there.

Streamlining the message for social media and developing a digital brand will be critical to success of this campaign. Promotion of eldercare careers through social media/digital identity will be available to a larger audience but will support the internal audience as well as educational audience.

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

With the size of this project, I have learned that I must let go of the small details and let the leader in me take over. The operations side of life is necessary; however, in many situations, leading a process as opposed to being the process is required for any real change to occur – small or large. Learning to leave the “dance floor” and get up on the balcony has been a challenge for me. This ALP is a great example of my changing thought process. My first version of this ALP was outlined in bullet points and was 12 pages long. I chose to pull out the bright spots and focus on leading the idea and not be the only one looking to change. It will take many and I will happily shape the path.



Melissa Dardinger

Organization: OPRS Foundation

Title: Associate Vice President of Communications

Name of ALP: Increasing Donor Retention for Greater Lifetime Value

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

For several years now, OPRS Foundation has noticed a downward trend in support for Life Care, our benevolent care program. Through earlier research about generational shift, this seems to be in line with donors' increasing desires to see tangible results for their gifts and decreasing trust in organizations and institutions. This downward trend was not just noticeable in our major gifts and planned giving areas, but also in our direct mail appeal performance. Overall, our total gifts and total number of donors was remaining steady; but because my department is responsible for all of direct mail, I could see that we were gaining donors for new service lines like hospice and rehab, which must mean we were going down in our core areas. In January of 2015 my team and I noticed that, despite our best efforts to reverse this through best practices in storytelling and direct mail, we were not moving the needle in a positive direction. We ran some additional reports that confirmed what we already knew: donor retention was slipping, at a concerning rate. National studies have shown that donor retention rates are going down across the not-for-profit sector, with numerous resources available to help organizations reverse that trend. We found that our retention rates were either at or below the national average, and yet many of the recommended "fixes" were already part of our standard procedures. Dr. Adrian Sargeant notes that "improving donor retention by just 10% can double the lifetime value of your donor database." With other challenges the OPRS Foundation is having in the planned giving areas, increasing lifetime donor value is of high importance to the organization.

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

Through this ALP, I hope to increase our donor retention percentage by three percent this fiscal year, and by 10% in three years. This should bring a corresponding increase in total giving, total number of gifts, and total donors. My hope is that the increased engagement and donor loyalty over time creates more prospects for major gifts and planned gifts for the organization. This will significantly increase donor lifetime value.

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

My sponsor is my supervisor, Tom Hofmann, president of the OPRS Foundation. I brought him this problem last year, and he agreed we needed to create a plan to address it. He supports using the ALP to develop this plan, and added it to the OPRS Foundation's Three-Year Strategic Plan for fiscal years 2017-2019. We meet monthly for one-on-one conversations, and this project is on every monthly agenda. I also use our monthly communications team and officers team meetings to report as needed and gain feedback from a wider variety of colleagues (including Sue Welty and Cheryl Mclaughlin, who have each participated in the Leadership Academy).

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?

Sue Welty, vice president of gift planning, and Cheryl Mclaughlin, associate vice president of Foundation finance and administration, are serving as my mentors through this process. We are in the same office, so we talk informally on a regular basis.



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

1. Added the Donor Retention Plan to the OPRS Foundation Three-Year Strategic Plan for fiscal years 2017-2019. This plan begins July 1, 2016, and was developed in March 2016.
2. Analyze our performance data in new ways to get the true picture of our donor retention situation. March-April 2016
3. Research best practices in donor retention. April-May 2016
4. Meet with my team to develop a plan for donor retention improvement. June 2016
5. Present plan to OPRS Foundation Officers. June 2016
6. Present plan to the Planning & Communications Committee of the OPRS Foundation Board of Directors for endorsement. June 17, 2016
7. Implement the plan. July 2016-June 2017 and beyond.
8. Measure results and tweak the plan as needed.

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

My department has never had dollar goals, like our fundraisers do. Our responsibility is to create donors and keep them engaged in our organization's mission so that they can provide lifetime value through major and planned gifts. Therefore, our accountability measures have always been non-financial. I have only analyzed and reported financial performance for the purposes of identifying trends to improve our program. Through this project I'm learning that I can create additional areas of accountability for my team, and be valued for it by my board and supervisors. I've also learned quickly that financial measurements make me uncomfortable, because there are numerous external factors that will affect my team's ability to succeed. I understand that I must establish both the environment and expectations to allow my team to execute the plan properly.



Tiffany Dowling

Organization: Sunset Retirement Communities

Title: Human Resource Liaison

Name of ALP: Mentor Program

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

Christine Blackmore, Licensed Nursing Home Administrator of Sunset Village, inspired me to choose this mentor program as my Action Learning Project (ALP). This ALP will impact our organization by bringing our associates together as a team and allow them to get to know each other better. It will also empower the staff to step up and feel they are giving back to Sunset Village in a new way. The thing I am hoping to see happen the most is that it will encourage all of our staff, no matter their role, to feel like they are a leader of their job. I want them all to feel happy with their career choice and what they do for a living. I believe that if they feel this way, they will give even better aging services back to our elders. They will ultimately feel fulfillment in the services they provide, which will benefit our organization in so many positive ways.

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

The overall goal of this ALP is to see a different type of atmosphere at Sunset. The final vision would be to have a more positive work environment for our associates. If I had to think of what would look different after implementing this program, I would hope to see smiles on the associates faces when they are at work and see that they all feel like leaders in their own way. We also hope to see new hires feeling more comfortable at Sunset Village when they first start employment. We want them to feel included in our community. Another goal is to allow the current staff the opportunity to be seen as a leader in their household that they work in. We hope to see the staff more engaged with the elders and see them enjoying their careers more.

A personal goal that I hope to achieve is becoming a more effective leader. I hope to experience good leadership skills by bringing my team together to obtain our goals in this ALP. I want to show my team that I can implement and guide our organization in the right direction. I am optimistic that I can help promote a positive work environment as well as a wonderful place to live for our elders.

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?

Vicky Bartlett, CEO of Sunset Retirement Communities, is my sponsor. I have discussed my ALP with my sponsor and she felt it was a very useful project. She thought it would be a beneficial program that will create an end goal of where we will see associates more involved in their work and with their elders. My sponsor and I meet regularly and we will continue to discuss the ALP.

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

We need to meet again about the implementation of this project and what the next steps are going to be. We have been meeting regularly as a team and the project is almost complete and ready for implementation. I have everything organized and ready to go, but I would like to meet with more associates to get their opinion. I believe it is important to get feedback from the people this project would be impacting the most so they feel like they are a part of creating the ideas for the project. Also, I would like to get an estimated start date of implementation and need to make sure I have the supplies needed such as gift cards. Our team is also in the process of creating a facility questionnaire and a welcome letter.

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

I am learning that I am a strong leader when implementing a new program. I have organized my team to come together and I encourage others to be creative when thinking of new ideas. I myself have had to think outside of the box when working on this ALP. I feel that I have brought my team together and collaborated all of their ideas to create a very beneficial project. I have also learned during this process that I am a very optimistic and positive person even when things get tough. Through the bumps of applying a new program to our organization, I always encourage our team and help them get through it and help them remember the ultimate goal that we are trying to achieve. I think that during this project I have learned a lot about my leadership skills. I have been able to progress on some of the things that I hoped to improve on and also have been able to show good leadership qualities I already possess. This whole experience as allowed me the opportunity to shine as a leader.



Augustine Gendics

Organization: Wesleyan Village

Title: Administrator

Name of ALP: Elevating the Life Enrichment for our Residents

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

I chose this ALP because I wanted to make sure we were capturing the engagement of all the residents that we could in the facility and highlighting the talents from our residents and staff to enrich our activities throughout the campus.

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

I want the elements of emotional, social, spiritual, physical and educational to be encompassed for every resident and the team implementing it to believe in the mission and embrace it. My goals are that the residents and staff will be more engaged in the environment of our life enrichment activities. Residents will start to use their talents to come up with a well-rounded calendar of activities that will include other residents and staff from throughout the campus. My success would be a vibrant community that has engaged all residents to participate in some way and the campus as a whole embraces the "new" culture of being "active" in every way. We must make every opportunity, a chance to encourage the residents, staff, and visitors to engage in life here at the 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?

My Sponsor is Debra Cihla and we meet on a weekly basis to discuss other matters including this one.

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

My next steps are to keep restructuring and empowering the Life Enrichment department to start looking outside the box for creative ideas. I want them to bring any and all ideas; the thinking will be; that we want to say yes for all ideas. I want the team to start engaging all departments for life enrichment and recognizing that it is every staff and residents responsibility to make sure our resident have a great quality of life.

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

I have learned that empowering a team to start holding themselves more accountable and pushing them to create a vision also, most of the time they will embrace it. I am learning how to drive the vision for the team as a whole so that our goals merge and make for a positive outcome for everyone. My mistakes are learning opportunities, I need to know that I do not know everything but I need to choose a path and if it does not work, lead my team on another one. I have learned that visions are very fluid. Visions may not always lead you to the end result you thought you were headed, but in the end, it will be the right one if the whole team is engaged.



Jennifer Hall

Organization: Otterbein Home Health

Title: Director of Operations

Name of ALP: Star Partner Program

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

I am always looking for ways to improve processes and empower my team. Recently, Medicare has begun to rate home health agencies with a "Star Rating" much like skilled nursing facilities are graded. The rating system goes from 1 to 5, with 5 representing superior, quality patient care. The ratings are comprised of both patient satisfaction and health care outcomes. I chose this as the inspiration for my ALP. My action learning project has the ability to provide team building, self-empowerment for each partner and improvement in the quality of care for patients!

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

I have multiple goals for my ALP. The first goal is fostering teamwork amongst each partner and for each one of them to grow individually with support and encouragement from each other. Second, the patients will benefit by having the best quality outcomes possible and highest patient satisfaction levels. Third, the clinicians will be recognized quarterly based on their own star levels. I hope by encouraging everyone to share their best practices all partners will achieve their highest quality goals. Our team will get stronger by building deeper relationships with each other and the patients will receive higher quality care. The outcome of reaching all these goals will benefit our home health agency by increasing our Star rating with CMS.

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 human resources manager. She has been through the Leading Age Leadership program herself. She is able to give constructive criticism and does it in a thoughtful, yet supportive way. I have spoken with her many times throughout my journey and will continue to communicate with her as my mentor.

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

We have a software program that provides objective individual reports on quality measures and patient outcomes. I have met with each clinician to review and identify their special talent area. Each clinician will next prepare and present their "best practice" for that area to the rest of the team. Ultimately each partner will achieve stars based on their own growth and receive a quarterly, quality incentive. This allows for them to be their own best self without being compared to each other. I will support and focus on each person's strongest points, building their self-esteem, and empowering each person at the same time. I will be taking clinical scorecards to organizational leadership to show the improvement to support quarterly incentives for each partner.

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

My growth during this entire journey has been extremely profound. I am using many of the learned techniques every day. I am growing more emotionally intelligent and am improving my work-life balance, and communication. The leadership program has vastly affected my management style. It was more than just reading the materials. The mentorship of the leaders, the interactions, and the shared experiences that each person has been through was crucial to the journey. I feel very blessed to have been chosen to participate.



Angela Lodahl

Organization: Ohio Eastern Star Home

Title: RN Unit Manager

Name of ALP: Staffing to Promote Better Patient Care

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

I chose this topic because I wanted to help the staff be more successful with the care they were delivering to patients. A common theme they would bring to me is so many tasks so little time and the lack of team work between shifts, this is for both nursing and STNA's. This will help my organization because with better team work and adjustment of staffing ratios staff members will be able to provide better patient care leading to better patient outcomes and higher satisfaction ratings. This is also something that will require input from the front line staff members. I will be getting their insight and opinions on staffing ratios, how to build team work, and what barriers they have. I have had patients say to me "I want to feel as though I am the only one here, I want the nurse's attention." With the ratios that are in place this is nearly impossible for the nurses to meet this request due to the volume of patients and tasks.

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

I hope to accomplish with this project better team work between the different shifts and better patient outcomes/higher satisfaction of patient care. I want to give my nurses less work load so that they can provide the type of care they want, and reduce their likeliness of burn out.

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 CEO is my sponsor. I have had conversation with her regarding my ALP and she is in support of it. This project will require an increase in the nursing budget for our organization which will have to be approved by our board members. This will require me providing information to my director of nursing and my CEO showing the necessity of different staffing ratios and my CEO will have to present that rationale to the board members.

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 director of nursing is my mentor. I am looking to her for support and guidance. I am also looking to her for constructive criticism as she has much more experience than me in the management field of nursing. We work together so I will be able to communicate with her as often as needed. During the process of change she and I will be able to communicate the new structure of my unit at nurses meetings and learning circles for the staff.

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

At this point, we have implemented the new structure. Our nursing team has discussed the barriers to this new structure. Open honest communication is necessary in order for the staff to join the excitement of this change. It will be imperative to follow through on responding to my teams concerns as they arise. We will evaluate the results after some period and I need to help facilitate any needed changes.

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

I have learned that I have to be able to explain expected outcomes and share the ideas in multiple ways. Not everyone learns by hearing, therefore providing staff with examples on paper has proven helpful. I have also learned to pause before I respond. After reading emotional intelligence, it makes so much more sense now as to why this is an important step to take. I am a people pleaser and I want everyone to be happy. I have learned that I have to hold people accountable for their actions and cannot fix everything all the time. It has been difficult for me to grasp this as I don't want staff to feel as though I am upset with them. However, to be a good leader, I have to empower the staff so that they can grow and make decisions when I am not here.



John Orlosky

Organization: Breckenridge Village of Ohio Presbyterian Retirement Services

Title: Assistant Dining Director

Name of ALP: Shafer/Schweitzer House Kitchen Redesign

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

Our facility is fortunate to have the Shafer/Schweitzer House (SSH), which is primarily a HUD subsidized facility. This kitchen has been providing warm meals for over 35 years to low income seniors that might not normally have proper nutrition provided in such a manner. The kitchen is becoming outdated and needs to be reconfigured. Working on this project will help our staff continue to provide great service for years to come. By remodeling this kitchen, it will increase productivity, increase efficiency, increase sanitary conditions, and increase staff and resident moral. All of this factors into resident satisfaction and ultimately supports the mission of the organization.

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

My overall goal is to improve the kitchen through incorporating feedback from our residents and team. The kitchen will be redesigned to help meet the changing needs of our residents. By doing this project, I hope to practice my soft-ball questions, learn more about the operational procedures, new construction, and working with community partners. Also, I would like to have modern equipment and systems in the kitchen to properly support the staff.

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 David Schell, Executive Director of Breckenridge Village. David has inspired me to work on this project. We routinely communicate about ideas and thoughts, especially after food committee meetings and surveys. As this project unfolds, I will have more timely communications to assure all the goals are being met, both in person, meetings, and e-mail.

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?

I've selected Josh Siegel, Housing Manager at Breckenridge Village as my mentor. I also see Josh regularly each week. Josh is willing to support me in any way he can. He's been a big help already by providing an outside of the department perspective and providing good tips. I will continue speaking with him often about the project.

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

I've spoken with other leadership and we've interviewed staff members who have worked in the kitchen daily for their input. We gained feedback from other department leaders to inquire about fire codes, water drains, grease traps, and electricity. We will continue to work with them and outside partners to accomplish our goal. I will continue to use many of the newly acquired skills I learned in the leadership class to accomplish this project. The next major step is to secure funding to complete the project.

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

By reading and learning from the book Strengths Finder 2.0, I've learned how my own values shape my leadership style. Taking a Myers-Briggs test and the Strengths Finder 2.0 assessment helped me to understand more about myself. I learned that not everyone has the same strengths that I do and I should not expect others to be exactly like me. I've learned to utilize emotional intelligence while working in the field and even at home. After reading from the book Emotional Intelligence 2.0 I learned how to be self-aware, how to self manage, social awareness, and relationship management. I've learned by reading the book The Speed of Trust that being straight forward with staff members creates an atmosphere of trusting relationships. As the phrase goes low trust/high cost and high trust/low cost. And by reading the book Switch I've learned some good ways to make change happen in an organization.

Throughout the class I've enjoyed the "soft ball" question sessions and meeting new people. I learned how important self care is and one of my favorite exercises that we've done in class was The 6 Thinking Hat exercise by Edward de Bono. It helped me to think about things in different ways. It reminded me of what I've learned from Strengths Finder 2.0 in session one, that not everyone is like me or thinks like me. I've grown as a leader because of taking this class and I'm grateful for the opportunity.



Selena Pittman

Organization: McGregor PACE

Title: Director of Social Services

Name of ALP: New Employee training guide and an Introduction Orientation sheet of McGregor PACE staff.

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

I was inspired to implement these training guides because I saw the need for accountability when new employees are hired. Our organization has done a great job in making sure new employees are trained. However, there are limited formal written training sheets an employee can reference back to once orientation is completed. PACE is a very special and unique program. The legacy PACE is developing has to be captured not only in the day to day work performance of our awesome team but we have to ensure that new members are learning the same step by step tasks, procedures and our teaching is consistent with our mission statement and our goals.

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

There are a few reasons why I chose orientation and development as my ALP. Currently, we have limited formal training papers in each department. We have had feedback from present and past employees that have expressed, if he/she had a formal training guideline, it would have impacted their knowledge of the organization and would have also been a resource to reflect on for future reminders of how to do various task. Part II of my project involves a descriptive sheet of our organization and a detailed description of departmental tasks. I think it is imperative that new employees are able to have a glimpse of the entire organization and some of the duties assigned to particular departments. The orientation sheet represents a variety of positions and departments. This will give the new employee a sense of knowledge and a clear direction to which he/she should address when he/she has questions.

I am happy the program incorporates an ALP which has allowed me to prioritize working on this organizational need.

The goals I hope to accomplish with my ALP are to have clear and precise formal training instructions for new employees. Second, for new employees to have a clear understanding of the expectations from the department they are hired to work in and a better understanding of the organization as a whole. Third, each department will create a manual for his/her department. The staff will be able to cross train each other on the basics of the PACE program and the current morale will elevate to another level due to increased confidence in staff PACE will experience more longevity in employment with staff while participants and family members will have a clearer understanding on how to identify what members on the IDT team do, and staff will be able to perfect his/her skills and not be concerned about other disciplines. As a result of these goals, it will enhance the care we offer our participants and improve our collaboration as an interdisciplinary team.

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?

Tangi McCoy, CEO of PACE is instrumental in moving forward with my ALP. We have had several meetings to determine the needs for new employees and have developed an action timeline. We communicate routinely and plan to continue with our weekly meetings. Tangi has been a mentor and an inspiration in developing my leadership skills and growth in the PACE organization.

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

Currently, three departments have already implemented the new training guides, I designed for them. Other departments will put into operation the training guides during the next couple of months. The orientation sheet is completed and a copy has been given to the Human Resources department. Staff has begun to utilize the orientation sheet. The orientation sheet was distributed to the current McGregor PACE staff in our quarterly all staff meeting this past June 2016.

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

I have learned that I am an “influencer” as well as a “creator”. Working in an environment where you are constantly encouraged to explore options and think outside the box is a haven for creativity. I believe in starting with myself and then if it works for me then I will take it to the masses. I began this journey by developing a training guide for the social work department. The training guide has been accepted in the organization and is being utilized.

In summary, I believe a quote by Phil Jackson, “The strength of the team is each individual member. The strength of each member is the team.” I will continue to grow and learn each day as a member of the McGregor PACE family.



Maureen Scheiner

Organization: Bayley Senior Care Corporation

Title: Fitness Center Supervisor

Name of ALP: Quarterly Lunch and Learn Series at Bayley

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

A need for educational outreach to our fitness center members, as well as the community at large, has inspired me to choose this as my project. Our fitness center offers group and individual exercise options, but we have not organized regular speaking events on wellness related topics. Over the past year we've had just a few speakers on various topics and the crowds have been overwhelming. Perceiving a hunger for wellness information, another staff member and I launched a Lunch and Learn Series which began in June 2016.

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

At the Bayley Fitness Club we aim to provide a continuum of wellness to our members and to the community. In addition to physical wellness, we touch on the many facets of wellness including spiritual, social, emotional, environmental, occupational, and intellectual. We hope to provide educational information on a variety of topics relevant to our mostly-senior population. By promoting each of our sessions via flyers in our facility, emails to our members, and press releases in the local papers, we hope to increase community awareness of Bayley. Once on our campus at the wellness center, individuals can learn of Bayley and the various services we offer in the senior 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 is my boss – Vice President of Operations at Bayley – Paul Kocsis. He has been very supportive of this new Lunch and Learn series. Since the Lunch and Learns are being offered quarterly, at our biweekly marketing meetings, we discuss upcoming sessions and brainstorm new topics/new speakers that we might offer for future dates.

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?

I've chosen friend and Fitness Center member Cindy Lamb as my mentor. Cindy was a professor of Marketing and Management at the local university. She now owns her own consulting company, offering individuals and companies expert advice in the areas of organizational management, retention, and marketing. We meet biweekly, and she shares some of her valuable experience with me, as it relates to my job as a whole and my project in particular.

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

To make our Lunch and Learn series successful in the short and long term, my staff and I will continue to consider pertinent topics, reach out to potential professional speakers, and maximize our marketing efforts for each event.

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

Launching the Lunch and Learn series has been a great learning experience. I've thoroughly enjoyed brainstorming topics with other fitness staff members. Thus far we've gotten great support from fitness club members, members of other Bayley departments, and upper management. I've learned to delegate tasks to staff, consequently empowering them to communicate with potential speakers, lead discussions in open forums, and continue to brainstorm new ideas. I have gained confidence too as I've addressed the topic with the Bayley Board and Strategic Planning Committee. Because I believe in the project and the impact the informational sessions can have on our community, I have felt very confident reaching out to heads of organizations and experts in different fields. I look forward to hosting on-going Lunch and Learn Sessions of many varying topics at Bayley.



Stephanie Schoenberger

Organization: Ultimate Rehab, Ltd.

Title: Director of Compliance and Clinical Services

Name of ALP: Coordination of Care Between the Various Departments of a Nursing Facility

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

I was inspired to choose this topic after CMS began launching initiatives surrounding the care provided to their beneficiaries. A mandatory initiative was proposed in July 2015 that would impact the care provided to patients who receive total hip and total knee replacements. It would span a 90 day period after their discharge from the acute care hospital and would look at the care provided both acutely and post-acute care. The total costs of care would be reconciled against a target price. The goal of this effort was to promote more coordinated care across the continuum as well as reduce unnecessary spending. As I became involved with this initiative and the impact on therapy, especially within the skilled nursing facility setting, it became apparent to me that there needed to be better coordinated care within the facility with these patients. This would allow for better and quicker healing and an overall improved quality of life for the patients we serve. While this is the first mandatory initiative to impact skilled nursing facilities recently, coordinated care should be the goal for all patients. This will impact my organization by allowing for greater communication and interaction with members of the entire care team. I also foresee it will allow for better improvements to be made for the patients we treat.

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

I hope to accomplish a standard of protocols for a multitude of diagnoses that are typically seen within the skilled nursing facility. Once these protocols are established, education and training would be completed with all members of the IDT as well as all staff involved in the patients' care, including but not limited to activities, nursing, STNAs, and dietary.

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 MacDonald, COO and Owner of Ultimate Rehab, Ltd. He has played an integral part in my development, growth and involvement with the mandatory bundled initiatives. He has been involved with assisting me in the development and planning for the implementation of the protocols. I typically meet with Tom on a weekly basis to discuss my active projects, including the progress and any further assistance I may need in completing these projects. I have incorporated this project into my weekly discussions with him as well as other members of our company who are able to assist me.

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?

I have selected Tammy Cassidy as a mentor. She is the person that I am working alongside to develop the clinical protocols to include the medical component. She helps me have a more global understanding of how to make a collaborative effort within the nursing facility effective. I have communicated with her regarding the development of protocols. I will continue to communicate and sit down with her to discuss barriers and appropriate plans to continue with development.

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

In order to accomplish my goals, the steps I am taking begin with identifying the most common diagnoses that we provide care for and begin to develop a protocol regarding therapy recommendations for each of the diagnoses. From there, I will meet with a nursing specialist to discuss the medical considerations that should be included in the protocols. Once the protocols are established, I will work towards identifying the most effective method of implementing training on these protocols. This would include meeting with therapists and nursing staff to meet the individual needs of the facility. I then plan to complete facility wide education on their part in the continuum of care and what steps need to be taken to ensure there is excellent carryover between departments.

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

One of the biggest areas I am learning about myself is how to work more effectively with groups of people. Historically, I have thrived completing tasks as an individual and with this project, it requires multiple people from multiple backgrounds to be involved. I am learning that sometimes, to be effective, I don't have to be the one making all of the suggestions. Sometimes it is more beneficial and effective for me to put my idea out there and just listen to the people who will be responsible for completing the daily tasks. While an idea may look good on paper, when it comes time for the practicality and implementation of the idea, it may fall short.



Janet Sulewski

Organization: The Woodlands /Sunset Retirement Communities

Title: Executive Director

Name of ALP: Resident Wellness and Activity Programming

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

I started my role as the new Director at The Woodlands in January of this year. We have had some turnover in our Life Enrichment staff over the past few years. That is why I was inspired to develop a stronger Wellness and Activity Program for our residents. With the help of our new Activities Coordinator, we concentrated on creating meaningful engagements for our wide span of residents to participate on different levels for activities and functions. Although we are an independent community, we have residents that range from 69 to 104 years old. Many have hearing loss, visual issues, and some memory loss. Their level of participation varied depending on the particular activity. We first identified the residents that needed additional help and support to participate in daily events. From there we researched future activity ideas to implement into our program. The impact on our community was to increase fellowship, reduce loneliness and boredom, and strengthen social independence.

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

Our goal for the residents has been to improve quality of life, challenge their minds, to provide multiple opportunities for recreational, social and meaningful interactions. We continue to encourage the residents to participate and get exposed to a wide range of activities each day. We have created a wellness program that allows the residents to learn fun new things, express themselves individually, and to learn at a level that they are comfortable with. We promote a feeling of accomplishment among the residents because they have been successful in developing new ways of learning. We continue to measure results through monthly Resident Activities Meetings, overall attendance of programs, and the involvement of new residents to new activities.

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?

Vicky Bartlett-CEO of Sunset Retirement Communities is my sponsor. We have discussed this plan and Vicky has provided me with additional recommendations and suggestions. She continues to offer her assistance and support.

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?

Diana Hoffman, the former Executive Director is my mentor. We have discussed the growth of this program and her recommendations of the benefits to the residents. Diana continues to offer her support through her monthly visits, calls, or email.

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

Our first step to accomplishing our goal was to “brain storm” together on wellness and other activities that would appeal to the residents that function at different levels. Through the collaboration of our leadership team we communicated, discussed and assigned tasks that empowered each of them in this project. We meet on a regular basis to plan and communicate our vision for future programming for the residents.

Secondly we created a list of activities that appeal to those with memory challenges, hearing challenges, visual challenges, and mobility challenges. By understanding the leadership team’s values and capabilities we learned to trust each other and the decisions they were making on behalf of the residents.

Lastly, was implementing each activity. Our leadership team worked together to get the programs implemented. We continue to work together to strive towards new ideas and resident satisfaction.



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

I have learned the importance of being a good listener so that I can effectively communicate to our team. I understand the importance of earning the trust of my team and trusting in them so that together we can accomplish our goals. Through better emotional awareness my focus has had clearer direction and I can be more effective in making and handling decisions. Trust, Communicate, Mentor, Listen, Learn, Understand, Guide, and Celebrate Successes!

I have learned that leadership is an ongoing process. By utilizing the tools that have been taught to me through the Leadership Academy...I can continue to grow and develop my leadership skills.

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