

LeadingAge™  
Ohio

# *leadership academy*

2018 Action Learning Projects



Partners:





*leadership academy*  
**2018 Action Learning Projects**



The LeadingAge Ohio Leadership Academy is a seven-month leadership program designed to develop aging services leaders statewide. The Leadership Academy provides a challenging and engaging learning environment that enhances the leadership capacity of health care professionals so they are better equipped to serve our profession.

**Denise Anderson****Organization:** National Church Residences**Title:** Executive Director**Name of ALP:** The implementation of a new Electronic Health Record software system.**What inspired you to choose your ALP? How will this ALP impact your organization?**

I was asked to coordinate the implementation of this new software system around the same time I was delegated to participate in the Leadership Academy. When I learned about the purpose of the ALP assignment, it seemed fitting to test learned leadership techniques as I worked through this implementation.

Successful implementation of this new system will change the way our organization provides care for the seniors we serve for the good. We are rolling out more than just new software. We are changing the culture of our care environments to be even more resident-care focused, we are enhancing communication between service lines ensuring that the continuity of care is seamless, and we are streamlining work flows so that team members can spend more time with our customers than they do with paper.

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

I hope to lead our project team through implementation at each of our fourteen facilities successfully. Success means that each affected team member completes training feeling knowledgeable, capable and passionate about their role in this new direction of care.

**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 our Vice President of Healthcare Operations, Doug Himes. Doug and I have update conference calls each week and he has been available for additional support/direction as needed.

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

I have, unofficially, reached out to two leaders in our organization to serve as my mentors; our Senior Vice President of Human Resources, Danielle Willis and our Senior Vice President of Education, Julie Fox. Though I have not formally asked either to mentor me, both have served in this capacity by being supportive and accessible, answering my many questions, offering me words of encouragement, giving me direction and inspiration throughout this process.

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

We completed Phase 1 of 4 of this implementation in July ☺. We are currently reviewing all of the steps taken to get through Phase 1 and “tweaking” our rollout process for Phase 2 which is scheduled for December 2018.

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

I’ve learned so much about myself as a leader through this process. I’ve learned that leadership isn’t static; what works with one team or on one project, or even different groups working on the same project may not work with another. Successful leaders are dynamic and able to transition as needed. I’ve learned that staying true to my authentic self as a leader doesn’t mean that I can’t re-invent myself and my leadership style for the good of the mission. I’ve learned that leadership is a life-long learning process, a journey and not a destination defined by a title. Most of all, though I’ve found validation in my leadership capabilities, I still have a lot to learn. ☺



**Julie Bareswilt**

**Organization:** Bayley

**Title:** Assisted Director of Nutrition

**Name of ALP:** Establish a food committee.

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

I am always looking for ways to improve the dining experience for our residents and get them more involved. By developing a committee they will be able to share their thoughts and ideas about the food and the atmosphere in the dining room. I am hoping the residents will be willing to share some of their favorite recipes and that we can spotlight them during meals. I think this committee will have a positive impact at our facility, because it will give the residents the opportunity to be more involved with their dining experience. We will be able to take what is positive about the dining experience and build on that.

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

My goal is to increase both the resident and family satisfaction survey. On our last survey the residents stated that they do not have input on the food that is served and through this committee they will be able to have a voice in what they would like added to the menus. They were also asked if they get their favorite foods and now with the committee we will be able to add their favorite foods to the menu. I would also like the residents to have a voice in how they want their dining experience to be and know that I will work with them to implement their ideas. Another idea I would like to explore with this committee is to have a meal of the month and let the residents plan that menu and theme for the meal (Italian, Mexican, a cookout, or German, etc.). We are always getting new residents who are not always wanting the traditional meat, potatoes and vegetables at every meal and by working with them on this committee we will be able to adapt to the new changes that are coming in the future. The new residents are much more health conscience and are wanting lighter/healthier meal options.

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

My sponsor is Celeste Mackey, the Director of the business office. I have had meetings with Celeste and she has made some really good suggestions for my project. She has a different perspective, since she does not work in the kitchen around food. I am able to schedule meetings with her as needed. I can always email her any questions or ideas that I have.

**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?**

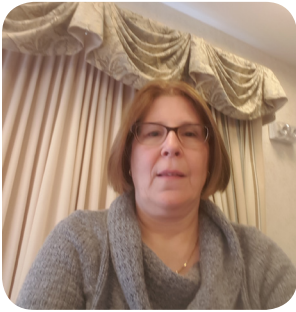
My mentor is Julie Nawalaniec, she is a registered dietitian and is our consultant. She consults for many different facilities and so I think that she will be able to support me with many different views of what other facilities are doing in their dining rooms. She is here at least once a month and I can always email her with any questions I have.

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

My next steps would be to explain what I have been doing through the Leadership Academy and the plan I have for my Action Learning Project. I will attend the resident council meetings for Healthcare and Assisted Living and ask the residents if they would like to join the committee.

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

By leading this committee and having different points of views it has made me look at things from a different perspective. I have worked in the kitchen and have gotten used to looking at things in a certain way. As the leader of this group I believe that it will be beneficial working with the residents we serve everyday and listening to their experiences in the dining room. We work in their homes and they should have a voice in what takes place in their home, just like we have a voice in our own homes.



**Kathy Bodde**

**Organization:** Kendal at Oberlin

**Title:** RN Manager Health and Wellness Clinic

**Name of ALP:** Meeting the Minor Health Needs of Our Kendal at Oberlin Employees

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

This project had been discussed for approximately one year prior to the development of a plan and implementation. We provide so much in the way of service to our residents and we were looking for a way to add a value-added service for the staff. Because we have a full-time nurse practitioner, we felt that we could provide treatment for minor illness and injury in our clinic. This would be a convenience for the staff member and reduce replacement hours for Kendal; the staff member would not have to take time off work to go to a doctor appointment. However, when we began to investigate the idea a bit more, we realized that staff would want to be able to use their insurance to pay for the office visit. I then did a staff survey, and although I didn't get back the number of completed surveys that I had hoped for, it did give me an idea of what the staff wanted. Staff did want to be able to utilize their Kendal insurance just as they would be able to do in a doctor's office, they also wanted to be able to utilize therapy services here at Kendal using their insurance, and they wanted easily accessible appointments. We have been able to provide care and services through our Kendal clinic and therapy utilizing Kendal insurance and we have been able to make the appointment same day.

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

There were several small goals that rolled into the larger goals. My first goal was to be able to have our small team work through the insurance process to become a provider site for both the clinic and therapy services. After that was accomplished, my second goal was to be able to plan and create a program that would benefit our staff. This meant developing the correct forms, billing processes, and collection of co-pays, and then developing a process of managing schedules so that employee visits would not interfere with our resident visits. If it all worked as planned, we would have a value-added service for our 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?**

Stacy Terrell was my sponsor and he was involved in the group discussions of the insurance process, necessary paperwork, and co-pay system.

**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 initial mentor on the project left the organization before the project came to complete fruition. We had multiple conversations regarding the various aspects of the project prior to her leaving.

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

We have successfully launched the project and have had several staff have treatment through the clinic and therapy services. We continue to "tweak" the process in order to provide quality service.

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

I have learned that team members will not always have the exact vision that you have for any idea. I also learned that having a vision and creating a way to make that vision a reality takes time and patience. As a leader, you must listen to all the ideas and evaluate each one. You must also push your team to accomplish the task/s that they have agreed to do in order to meet your timeline.



**Kristin Davenport**

**Organization:** Episcopal Retirement Services (ERS)

**Title:** Director of Communications

**Name of ALP:** Senior Living Podcast

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

In my daily work at ERS, I spend a lot of time listening to extraordinary stories from residents, families, and staff. What a wonderful gift for both the storyteller and listener. Being heard is affirming whether relating a life lesson, a funny story, or a sad memory the telling can bring joy and laughter, or relief and healing.

Staff and residents build relationships and many times the connections formed years before living in an ERS community.

An ERS podcast would give us a way to preserve personal recollections, shared memories, and record community history. There are times when residents rely on family members to carry on those memories. The benefit for residents and families will be to have a lasting way to give voice to these stories. At other times, I hear a family member or resident express their need for information on topics that we have written articles about or shared in a guidebook. Producing a podcast will give ERS another tool to offer expert advice to residents, families, and the broader community.

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

- Bring residents, families, and staff together to record personal and often shared history
- Build awareness of the active and purpose-filled lives of senior adults
- Broadcast information to enrich the lives of seniors and their caregivers
- Reinforce ERS' reputation as a trusted authority in the field of memory care and aging care services

**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 Bryan Reynolds, Vice President of Marketing & Public Relations for Episcopal Retirement Services. We have been meeting regularly and developed next steps together. Bryan and I will meet and review our progress at our bi-monthly one-on-one meetings.

**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 is Margaret Swallow, President of Swallow and Associates. We have been meeting regularly and she has been an inspiring supporter for my LAO-LA experience. Margaret and I will meet and review progress at quarterly one-on-one meetings. We will also keep current through emails and phone conversations between our "coffee connection" meetings.

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

I have researched national and local podcasts and had preliminary meetings with a vendor that could produce our podcast. After weighing this option, we believe we can produce the podcast with our own team.

The preliminary planning has resulted in a podcast format that would include three 10-minute segments per podcast episode. We plan to produce 12 podcasts per year. Six episodes will feature Marjorie P. Lee (MPL) residents, families, and staff, and six for Deupree House (DH) residents, families, and staff. These podcasts would include a resident/family memoir segment, a current event or activity segment with staff and residents, and a health care segment for MPL and a lifestyle segment for DH.



I have introduced the idea of recording and broadcasting their stories to seniors in my community who I trust to give open and honest feedback. The reactions have been varied and I will need to develop a better way to communicate what I believe to be the benefits to residents and their families. Based on the feedback, our team will develop an information brochure for families and residents. It is our goal to measure the interest in the podcast among families, residents, and staff. How does the podcast increase enjoyment and engagement for all? We will develop a survey to be given before and after participation. The podcast engagement will also be measured by subscribers, listens, shares, and downloads.

Next steps include researching the equipment and process for making recordings, production, and editing. My team member Brandon Parker will have a key role in the technical and production aspects.

Another step will include leading regular content planning meetings. The meeting will include my team members — Bryan, Brandon, Feoshia Davis, and a representative from Deupree House, Marjorie P. Lee, Fund Development, and Human Resources teams. The meetings will happen monthly and include long-term planning and short-term production scheduling. The host/interviewer will be identified.

A promotion/distribution plan will be created that will include determining the best place to post the podcast and the methods of promotion which may include promotion on the ERS, Deupree House, and Marjorie P. Lee websites, blogs, digital ads, social media, in ERS print magazines and newsletters, and paid native content.

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

I have been more aware of my top five Strengthsfinder strengths and the “basement” of each of them, as well as my DISC profile. I am mindful not to, “cause bad feelings by being too much of a manipulator. People may sometimes feel 'used' by me for my benefit rather than theirs.”

I have reviewed the Emotional Intelligence 2.0 Self-Management Strategies. I have taken time to include these steps into my regular daily or weekly routine: 3. Make Your Goals Public; 7. Smile and Laugh More; 8. Set Aside Some Time in Your Day for Problem Solving; 9. Take Control of Your Self-Talk; 10. Visualize Yourself Succeeding; 15. Learn a Valuable Lesson from Everyone You Encounter; 16. Put a Mental Recharge into Your Schedule; 17. Accept That Change is Just around the Corner.

All of these strategies are important reminders and I keep them as a list in a few places including on my phone and near my keyboard.



**Jenna Fletcher**

**Organization:** Ohio Living

**Title:** Corporate Manager of Recruiting & Onboarding

**Name of ALP:** Field Orientation

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

I just happened to spend my first day at Ohio Living almost six years ago at Ohio Living Rockynol in Akron. It was the best experience! I was able to tour the facility, speak with employees and residents, and learn about operations from the Administrator, DON and HR. I also had an opportunity a few weeks later to visit with our Columbus home health and hospice office to gain insight into their operations. Had I not had this exposure, as the company recruiting leader, I would have entered into my role so blindly.

Corporate employees are not always exposed to our daily field operations. We do not have a formalized program in place to facilitate these experiences. I feel it is vital for their success and ours as an organization to be able to facilitate the opportunity for them to see, hear, smell, and taste what our retirement communities and home health and hospice offices are all about.

I plan to develop an experience for our new hires that would expose them to our operations and so they can see exactly how they personally fit into the Ohio Living picture and help us deliver our mission. I also plan to put into motion an experience for existing employees who have not visited our locations.

From Leaders Eat Last, it speaks to meeting the people you help: *We are naturally cooperative animals that are biologically more inspired and motivated when we know we are helping others.*

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

This experience will allow the corporate employees to put themselves in the shoes of others (our employees and residents/patients) and have empathy for them as they go about their daily tasks. It will also build comradery amongst team members and across locations.

**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?**

Dana Ullom-Vucelich, Chief HR & Ethics Officer for Ohio Living, is my sponsor. I have provided her my plan design and overall scope. I plan to update her at major milestones then quarterly.

**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?**

Jennifer Howell, Corporate Executive of Employee Relations & Talent Management at Ohio Living, will be my mentor. I'm hoping she will advocate for this program to a successful launch and support its continued use. I have reviewed my initial plan with Jennifer and will update her at major milestones and then quarterly.





## *leadership academy* **2018 Action Learning Projects**



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

So far, I have had conversations with our location leaders in Central Ohio. All are very excited to partner with me and our corporate employees in an effort to expose them to their environments and show how their operation impacts their role at the corporate office.

I have also had conversations with our officers and department leaders to gain their buy-in into this orientation experience since they will have to give up their employees for a period of time in order to gain the exposure at our locations. I have been discussing with them not only having new hires go through this experience, but also existing employees.

From there, with the help of the location team members and resources, I will design various orientation experience models based on the employee's role at our corporate office. This would include tours, shadowing, eating our delicious food, and an emersion program that focuses on sensitivity to aging. For instance, an Accounts Receivable Coordinator serving Ohio Living Home Health & Hospice would spend a majority of their time within our Columbus home health and hospice office understanding the intricacies of our operations and systems and then go over to Ohio Living Westminster-Thurber and/or Ohio Living Sarah Moore for a tour. If they are a new information technology associate, they will need exposure to both sides of our business so they would have an experience designed to include visits to all of these locations and possibly more.

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

Now that I have more tools in my arsenal, I have more confidence with leading teams and individuals that don't directly report to me. In order to reach a goal that involves multiple people and departments, I have to welcome input to gain buy in, honor their knowledge, and collaborate effectively in order to deliver the best possible outcome.

I am a strong "D" and so I am fully content being in the driver seat of a project I am passionate about. I know I can't always be in control, especially of what others say or do or feel. This is where my biggest learning and growth opportunity will be. I will use the tools and resources bestowed upon me in the Leadership Academy to better read others to identify where they fall in the DiSC and play on their strengths and my own so our interactions are optimal. I am also more cognizant of my emotional intelligence so I can be more self and socially aware and better manage myself and the relationships.

I am also a perfectionist and I have learned that there is room for failure, shortcomings, changes, and improvements. Each of these are opportunities to learn from and to expand upon.



**Elizabeth Fox**

**Organization:** St. Francis Home, Inc.

**Title:** Director of Nursing

**Name of ALP:** New Hire Mentoring Program

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

The high rate in turnover at St. Francis gave me the idea to start this mentoring program. It will impact the organization by improving the turnover rate thus improving retention. The overall goal is to improve care to our residents with staff that are consistent and know our residents.

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

To reduce turnover rate and improve retention.

**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?**

Sean Riley is my sponsor. He is our administrator at St. Francis. We have worked diligently together on this issue. We communicate daily on improving the program we have in place. We plan to continue working on the program until we are satisfied with the outcome.

**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?**

Sean Riley is also my mentor. I hope he helps me by being the devil's advocate for ideas and things suggested to come up with things I haven't thought up. Bring barriers to my attention and help me work through them.

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

Our next step in the ALP is to develop our staff base so we can put together a program for the staff that will be the mentors. Our process so far has focused mainly on the new employee and how we will make them comfortable and feel supported, things such as giving them a nurse to communicate with and increasing our communication within the first ninety days. We have been working with the staff to make new employees feel welcome. Now we need to focus on the mentor themselves. Giving them the tools to know how to communicate with a new employee and knowing how to handle situations that would arise. First we had to build our mentor base to be able to provide this and now that we are gaining mentors we need to build a program for them.

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

The biggest thing I have learned about myself as a leader is that I have a hard time relying on other people to help me. I fall into this do it myself so it gets done attitude and I need to learn to let others do their part. This is hard for me because I don't want anything to fall through the cracks as I feel responsible. People respect my opinions and we can have a very good dynamic conversation about things. More people watch my reactions than I thought and they follow my lead. I am being the positivity that my staff needs to continue to move forward. They do not want to disappoint me and work towards not.



**Constance Green (Connie)**

**Organization:** Otterbein Senior Life

**Title:** Senior Human Resource Manager

**Name of ALP:** Internship Program

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

I selected my Action Learning Project for two reasons: 1) My daughter had recently completed an internship in healthcare as a requirement of her undergraduate degree, and 2) Otterbein has had some turnover in Assistant Administrators for our Small House Neighborhoods.

In reviewing the internship requirements for Bowling Green State University, I noted that Otterbein was not listed as a potential employer. Based on the fact that we have three locations within a 25 mile radius of the campus, this is a missed opportunity. I believe that an internship in healthcare could provide a potential pipeline for Assistant Administrators, as well as, increase recognition of the Otterbein brand within Bowling Green and other local colleges.

To develop the program, I will need to work with external resources. Since my DiSC Behavioral Styles indicate a High **D/ I & Low C/ S**, I will need to be more aware of the traits especially early on in the relationship while we are creating a working relationship.

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

My initial goal to start, is to develop and implement spring/summer 2019 relationship with one university, one Neighborhood, and one student.

My long term goal is to have an Internship Program that students “wish” they would be selected, the one “everyone” wants to be part of because it offers them solid learning that can be directly applied to their major and goals. Ultimately my goal is to build longstanding, quality relationships with several colleges and universities resulting in Otterbein becoming a potential employer for graduating students.

**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?**

Lois Mills, VP of Human Resources, Otterbein Senior Life. She recognizes Otterbein’s need to have a Program in place and recommended I gain the support the VP of Neighborhoods. We meet bi-weekly.

**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?**

Jackie Kissing. Jackie supports me by meeting with me to review my Plan, she offers support and guidance from her own experience of being in the Leading Age Leadership Program and in addition, gives me ideas and feedback for my project. I met with my mentor to share my proposal of developing an Internship program and gained her overwhelming support for this project. I schedule one-on-one meetings with Jackie as needed; she works in the corporate office and therefore, I am able to stop by for quick catch-up conversations.



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

#### Completed Steps:

I have met with my Sponsor/VP of HR, the VP of Neighborhoods.

Conference call with Katy Abbott, PhD, MGS, Asst. Professor of Gerontology, Miami University.

We reviewed my overall goal of developing an internship program with one university for one Otterbein's locations. Katy shared the University expectations of what the school expects from their students to obtain in an internship in order to meet the graduation requirements. Once I finalize my outline of what Otterbein wants from an internship student then she asks me to send her my outline due 8/24/18 of my vision of the program and she will send me the formal documentation supplied to the students; once we aligned with our goals, she will coordinator for me to meet other professors in the gerontology department so that we have a mutual understanding of Otterbein's Internship Program and they will direct students to Otterbein based on what learning opportunities we will offer and the students learning objectives.

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

- Review plan with Guides for their feedback
- Review with Sponsor the desire to pay – *at least minimum wage* (VP of Ops was looking into this as an option and he supported this proposal)
- Select a Neighborhood to pilot
- Select a university to pilot – Miami University
- Executive Leadership review and approve final plan
- Connect with Career Services and promote the program

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

Reflecting back to Emotional Intelligence Appraisal which revealed I need to continue to identify what pushes my buttons so that I keep control and combining this information with the inherited behaviors of my generation which I self-recognize as being a combination of the Baby Boomer and the Gen X, (Oct 1964).

Being more mindful of my learning through the Academy, I reflect on conversations with my sponsor and mentor who offered suggestions for my project. Although their suggestions were good and in line with my goals, I quickly recognized I didn't have passion for either of their recommended projects. Furthermore, being refreshed with my DiSC style of being "direct" I wanted to do my project of the Internship Program and I presented my preferred project and still gained their support. The direct part of me is that I am aware most times and I will push this down to avoid hurting or disappointing my supervisor. However, by thinking through my true passion for this project, I took time to review my approach to ensure I wasn't too blunt while respecting their kindness of offering suggestions.



**Margaret Hirsch (Margie)**

**Organization:** McGregor PACE

**Title:** Director of Dietary Services/Dietitian

**Name of ALP:** Implementing Telehealth Services at McGregor PACE

**Why did I choose Telehealth Services as my project?**

McGregor PACE is a Program of All Inclusive Care for the Elderly. We meet the needs of our seniors to keep them aging in place. Part of our program includes providing medical and transportation services to and from appointments. We are not only the provider of services to our participants but also the insurer. The use of Telehealth services can provide a benefit of care and cost savings for this model. Telehealth services at McGregor PACE has the potential to reduce transportation related costs, burdens of appointment and family escorts, long rides/waits to and from appointments, reduced cancellation of visits, more efficient appointments, potential for medical providers to be involved in specialty appointments, and reduced cost of medical care and hospitalizations.

I chose to explore the use of Telehealth Services first and foremost because I was aware that Telehealth Services was part of the long-term strategic planning of our organization. Additionally, I felt the potential cost savings across the span of PACE would be beneficial to the organization. Lastly, an outward comment made by a McGregor PACE participant additionally peaked my interest in this project. After a discussion of the use of Telehealth Services in healthcare, the PACE participant made known that she would be a willing party to participate in Telehealth.

**Whom will I work with to implement the project?**

I plan to work internally with our Medical Team, CEO, and Finance Team. I also will be exploring additional information outside of the organization from those who have implemented and utilized Telehealth Services, companies that provide equipment for Telehealth Services, and medical systems that offer these services. I have already received feedback from our medical team, CEO, outside organizations that utilized services. I also plan to set up meetings with Telehealth Companies and other experts in the field.

**What challenges you anticipate encountering as you embark upon the project?**

As I have continued to explore the use of Telehealth Services, the biggest challenge is gathering the information needed to implement Telehealth Services. Since this is very large project with great potential for cost savings, I have found the magnitude and scope of the project overwhelming for a nonprofit organization.

Additionally, I feel startup costs may be a challenge as well as the limited Telehealth Services that are provided by our current in-network providers.

**How will you engage key stakeholders in your project?**

I will continue to use our CEO as a sounding board for the project as well as our Medical Director. I will need to work on setting up meetings with interested parties and continue a fact-finding mission to present ideas to the stake holders. Ultimately, I believe by presenting the potential cost savings and benefits associated with caring for the elderly with the use of Telehealth Services to both our CEO and Medical Director will keep stakeholders interested.



## *leadership academy* **2018 Action Learning Projects**



### **How you will manage the success of the project?**

I believe the identified success of this project will occur in phases. The first level of success, will be to convince key stakeholders identified of the benefits of these services. The second level of success measured, is the opportunity to present the idea and a potential plan to implement Telehealth Services to McGregor's Board of Directors. The next phase of measured success is getting McGregor PACE Staff, Participants, and Family/Caregivers on board with the use of Telehealth Services. The last phase of measured success is the implementation of these services at McGregor PACE.



**Kathy Klein**

**Organization:** Bethany Village

**Title:** Life Enrichment Manager

**Name of ALP:** Roadmap to Driving Retirement

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

In my personal life I have had to be involved in taking the keys away from a loved one in order to keep them and those on the road safe. I found that there were a lot of tough decisions, misconceptions, and heated arguments with little to no support or resources. Conversations about giving up driving are few and far between until it is necessary. I would like to start the process earlier and get people thinking about what their independence can look like without a car versus what they perceive it to be. In this day and age there are so many ways to stay independent without even stepping foot into a car and I want to make sure that those options are introduced, talked about, and demonstrated so that residents can keep their independence and their families can sleep at night knowing they are safe and happy.

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

I hope to accomplish better communication between drivers and families about when to know when it is time to give up the keys as well as facilitate understanding and access to options to keep one's independence when actually retiring from driving.

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

I have established a committee of peers from different disciplines in my facility to start brainstorming and planning the driving tool kit that will include presentations, safety checks and support for those who decide to give up their keys willingly and to those families or community members that need a little extra help along the way. We are also planning on using outside facilities such as AAA, AARP, Carfit, and other delivery and transportation services to help us facilitate, and provide information for our presentations.

**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 is Judy Budi Vice President of Residential Living. She and I have met about my ALP and she has given me tools to create my committee and ways to delegate different parts of this ALP to each committee member in relation to their strengths. She will continue to be supportive and offer suggestions and guidance as the committee takes shape and begins to dive into the program objectives.



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

The next steps going forward are initial meetings with the committee to establish the mission statement for our project and to talk through what role (step) each person will be on the road map. The vision for this project is to have it up and running by Spring of 2019. This is right around the same time we will open our new assisted living building. The goal is to host quarterly informational meetings with both residents and families together to ensure that each group has heard the same information and is being given the support they need as they begin their discussion on driving retirement. We will also offer a retirement fair that will showcase the different options for delivery, shuttle services, and more. The outcome of our endeavors may take a couple of years to be fully grasped and get off the ground but I feel we will be able to recognize the change in the number of residents that are moving about the campus via other forms of transportation, talking with residents and families attending the meetings and communicating with the social workers who work closely with the residents. The barriers I foresee are the same ones that we have now and that is lack of communication between the driver and their family, a false sense of reality and the fear of giving up their independence.

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

Every leader has many that help mold and build them up along the way. In most cases you are not born into leadership it is acquired through hard work, dedication and knowledge. Coming into this Leadership academy made me take a good look at my professional life and my personal life to see what influences and guidance has gotten me to this stage in my career. Managers and mentors I have worked under in the past or currently that I would have deemed demanding or particular has essentially created the work ethic that I have now. My hope is that this journey that I am on will continue to allow me to build on my skills but also share those skills with others so that I may build them up as leaders as well.





**Lisa Macartney**

**Organization:** McGregor Foundation

**Title:** Assistant Controller

**Name of ALP:** Accounts Receivable Cycle Improvement Project

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

The Accounts Receivable Cycle variables influencing collection were changing so quickly in our organization we couldn't keep up. Our census dropped, we began accepting riskier payer scenarios, we increased our Medicaid pending applications tenfold and the County Medicaid department was going through changes themselves so were not responsive to any collection issues. Our organization had not experienced any of these variables previously so we needed to address the many challenges facing us to collect timely on billing and maintain a healthy cash flow and bottom line.

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

- Develop strong/consistent procedures from admissions, business office, social service to identify payer issues quickly and manage the process to ensure payment.
- Educate staff with new skills, so they understand the importance of each step to ensure collection.
- Identify pitfalls in the current system and change procedures to ensure proper payment.
- Manage the Medicaid application process from filing application to approval, stay informed from family/representative of process, attempt to manage the process ourselves to ensure timely approval and eligibility.

**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 and my mentor became the same person due to time limitations and access. I would have hoped to meet more regularly with this person as I developed and implemented the new system but time limitations prevented this. He was accessible if I would have run into any challenges.

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

While developing new procedures to manage payer issues it became evident the process was too demanding for the personnel we had. I attempted to assist with work load but began neglecting other responsibilities. Finally it was approved to hire an Accounts Receivable Manager (a new position) to manage the work flow and supervise the AR staff.

This one step will enable this project to be successful. Adding another employee to help with the work load will allow for others to maintain accuracy and timely collection of claims. With the new procedures in place and added supervision we will be able to manage the work load, address collection issues quickly and collect increased dollars due to McGregor.

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

I had to learn patience as we were not going to change our processes overnight. It can be very frustrating to change a culture where things have happened a certain way for so many years. I continue to work with multiple departments that we must communicate with one another to be successful in collecting receivables. I've had to learn how to get other departments on board with the boring but vital goals of collections when many are uncomfortable with or don't understand the importance of these areas.

I struggled with the admission that we needed to add another employee as I felt that I was failing the organization since we couldn't keep up with the work load demands. But ultimately without adding the AR Manager I would have failed the organization since WE COULD NOT KEEP UP WITH THE WORK LOAD. It was harder than I thought it would be to admit we needed help.



**Rene Marois**

**Organization:** Maple Knoll Village

**Title:** Assistant Administrator

**Name of ALP:** Memory Care Unit Remodel

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

Our memory care unit needed a complete overhaul, because it was not a unit that we could take pride in. Everything about it from the physical environment to the overall feeling you got while you were on the floor needed to be changed. As an organization the ALP will make our memory care unit a place where we would all want our loved ones to be if they needed the care, and will help us better attract potential residents.

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

We hope to change our care model from the traditional nursing home/medical model and transform it into more of a social model that has much more of a home-like feel to it.

**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 Tim McGowan and we have spoken about the project multiple times and he is definitely on board with the idea, and is very excited to see the results. I will be in constant communication with Tim regarding the ALP, as I will need his approval to make some of the necessary changes.

**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 is Karen Pendleton. Karen is our staff educator and corporate risk manager, and she has been my biggest supporter since I came to Maple Knoll over 8 years ago. I have spoken with Karen about the ALP and will continue to keep her up to date with all the changes occurring on the memory care unit.

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

We recently hired a new Dementia Program Director to manage the unit. She is a social worker by trade, so it is going to be a much different approach than we had traditionally used. We also just signed a contract with Xavier University Geriatric Montessori Program for one year to help us implement the new program, and to guide us in making the memory care unit a model for all other nursing facilities in the state. Xavier is going to be used as a consultant in this case and will be making suggestions as to how to best implement the changes. Once the program begins we will take surveys with not only staff but resident families to get some feedback on how they feel the process is going, and to offer any suggestions as well.

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

I am learning that I need to be a better communicator if I want to be an effective leader, and that communication is not just speaking but also listening. I tend to tune things out sometimes and that is not useful to not only myself but my team.



**Sarah Marsh**

**Organization:** Genacross Lutheran Services - Wolf Creek

**Title:** Associate Executive Director

**Name of ALP:** Enhancing Residents Dining Experience

**What inspired you to choose your ALP?**

I was inspired by the Independent and Assisted Living residents at our Wolf Creek Campus. They expressed interest in taking our meal service to the next level. Through conversations with them they wanted to incorporate new meal options along with making meal times more of an experience.

Currently the dining rooms are out dated. They have the same wallpaper and décor as they did when the facilities were built 18-20 years ago. Old chandeliers hang from the ceilings with burgundy and mauve valances over the windows. There are newer chairs around the tables that were purchased during the care center remodel that do not match the rest of the space in Assisted Living. The dishware, utensils, Kraft's, and linens are also in need of being updated. The items being utilized are the same as the care center which are not necessarily appropriate for Assisted and Independent Living residents.

As we allow our population to age in place the needs of the dining room services and atmosphere need to reflect the current needs of our residents. There are more residents now that are using walkers, wheelchairs, and power scooters which makes moving around the dining room difficult for the staff and residents.

The residents would like it to be more "resort like". This would include modernizing the décor and fixtures, upgrading the dining ware and linens, proving chef inspired meals, extending meal times, and providing staff with matching uniforms.

**How will this ALP impact your organization?**

Enhancing the dining experience will have a positive impact on the organization by increasing customer satisfaction. By taking action the residents that we serve will know that they have a voice and that their opinion's matter. Creating a new dining experience will also set this community apart from others and attract new residents.

Working with individuals from outside of our organization to complete this project will strengthen existing relationships and build new relationships. We would offer our campus as a test site for vendors to keep products and menus innovative. Connecting with area schools that offer hospitality, nutritional and dietary programs would also be a focus.

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

My sponsors for this project will be the Director of Dietary Services and the Director of Activities. I held an initial meeting to discuss the project and to start brainstorming on how we would move this initiative forward. We plan to hold weekly meetings to ensure we continue to make progress towards our goals.



**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?**

The Senior Director of Post Acute Services will be my mentor for this ALP. She has a lot of experience and knowledge and I hope that she can support my project by helping me connect with inside/outside resources. We will communicate in person, by phone and email. To stay on track and move the project along a monthly in person meeting will be scheduled.

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

The next steps to accomplish the goals of my ALP will be setting up a series of meetings and committees with residents, staff members, family members, volunteers, schools, and vendors. This allows input from various sources which will increase the creative ideas to take the dining experience to the next level.

**Week One**

Meet with vendors to discuss options and pricing for upgrades

- Furniture
- Window Treatments
- Décor
- Fixtures
- Linens
- Tableware
- Food/Menus
- Staff Uniforms
- Contractor (Painting/Wallpaper)

**Week Two**

Meet with Senior Director of Post Acute Services and CFO to discuss budget and possible options to present to residents, family members, and staff members

**Week Three**

Meet with residents, family members, and staff members to present options for upgrades

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

Through this process I have learned that change is hard even when it's agreed upon that the changes are for the best. It is also important that the process is openly communicated. Having regular meetings to discuss progress and allowing open dialog assist with making the process smoother and getting all involved not only on board but excited about the changes that will be taking place.



**Kim Peters**

**Organization:** Kendal at Oberlin

**Title:** Social Services Associate

**Name of ALP:** Develop a new model highlighting compassionate practices in Stephens Care Center (SCC) post-resident death.

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

In my role as a Social Services Associate, I am part of a team that provides exceptional, dedicated, person-centered care to residents in our licensed facility, the Stephens Care Center (SCC). I have both experienced and witnessed the business as usual approach to care once a resident dies. I believe we can develop practices that honor our grief and maintain our dignity as we continue our roles as care partners to our residents.

I am curious about how SCC staff effectively deal with loss and grief after a resident's death. I want to develop a model where the environment of loss is validated by purposeful practices.

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

1. Inquire if SCC staff feel we, as a facility, do an exceptional job allowing for staff expressions of grief and loss post resident death. This will be done by questionnaire.
2. Identify current practices staff use to allow their grief to be expressed. This will be included in the above questionnaire.
3. Explore practices and models used in other facilities that facilitate grief expressions. This will be done by an interdisciplinary focus group (IFG)
4. Discuss new options and practices that honor loss in lives lived. (IFG).
5. Implement at least one new practice in the SCC.
6. Evaluate after 6 months if the new practice(s) has had a valuable effect in work life. (IFG)

**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?**

Stacy Terrell, Chief Health Services Office is my sponsor. We have discussed this plan and he is very welcoming of it.

**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 is our psychologist, Dr. Indira Palekar. She brings with her an experienced ear and perspective on normalizing and accepting loss. My mentor is available to meet with me on an as needed basis both in person and by phone or email.



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

I will create and distribute a questionnaire addressing grief and loss in the work place. It will end with an invitation to be part of an Interdisciplinary Focus Group (IFG).

I will create an Interdisciplinary Focus Group (IFG) made up of SCC staff: 1-2 RNs, STNAs, a housekeeper and myself, in Social Services.

Together we will explore better practices to create an environment where staff experience increased opportunity to honor one another's sense of loss.

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

Good question! I know my strengths are in relationship building and executing. I am comfortable playing a listening, supportive role and working with a team to make improvements. Although I am comfortable taking the lead in small groups with people I work with on a regular basis, reaching out beyond to people I have yet to establish a relationship with, who represent different outlooks, and taking the lead is definitely a stretch opportunity for me. However, reading *Leaders Eat Last* by Simon Sinek has been an inspiration to me. I look forward to walking through those doors of opportunity.



**Karen Rowin**

**Organization:** Bayley

**Title:** RN, Director of Nursing

**Name of ALP:** Nurse shift reporting

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

I was inspired to do this project from many years working as a float nurse. I would find myself working on a unit where I knew the basics of what each resident needed, but found that I wasn't always getting the information about the residents that may have happened several days before. Improving the nurse reporting system will improve the quality of care, resident satisfaction and family satisfaction. The reporting will improve communication between nursing but also with residents and their families.

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

I plan to improve the communication within the nursing staff and produce better resident outcomes, better nurse to nurse communication, nurse to physician communication, and patient and resident satisfaction. The MD's, NP's and PA's will have increased confidence and satisfaction with our nursing staff. The families and residents will also have increased confidence that their needs are being met every day.

**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?**

Paul Kocsis, VP of Operations and Administrator, is my sponsor for this project. Paul and I have discussed the plan. I work closely with Paul and will communicate with him during the process with any updates.

**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 is the same as my sponsor.

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

I will be coordinating a small group of nurses to help be the champions in the beginning of October. I plan to motivate the group by providing examples of report sheets that do not carry over all of the information from day to day and log how often it occurs currently. We will begin researching other types of reporting that is able to carry over information beyond shift to shift or day to day. The project will start with one unit at a time until we are able to work through any of the problems. I will be able to show that with a continued report there is less communication breakdown and making hand off between shifts smoother. It will make the transition to other units easier as the float nurses will be able to teach each unit the process and continue the drive for better communication.

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

I am learning work on growing a team and setting clear and defined expectations. I am learning to be better listener and taking the time to understand the strengths of the team. I am learning to reflect on my day and make continuous improvements in myself, recognize my strengths along with my weaknesses and understanding where others fit in. I am learning to reflect on myself more than I was comfortable with and really understand the perspective of others and ask those tough softball questions.



**Lea Schuette**

**Organization:** Otterbein Senior Lifestyle Choices

**Title:** Assistant Vice President of Clinical Quality

**Name of ALP:** Leadership Education for DON/HCC

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

Otterbein has committed to leadership education for all Senior Leadership members at our campuses. The administrators are attending a monthly program conducted by OSU. HR and Clinical Leadership have teamed up to provide leadership training to the Directors of Nursing (DON) and Health Care Coordinators (HCC). With my Master's Degree in Nursing Leadership I hope to provide guidance and knowledge to our nurse leadership that go beyond clinical skills. Provide them tools that will inspire them to be the best they can be.

**How will this ALP impact your organization?**

The hope is to provide our leaders with tools that assist them in their leadership. Allowing them to develop strong teams on their campuses and reduce turnover and improve quality of care.

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

My goal with the development of the program would be to provide tools and knowledge to the DON/HCC that will empower them and help them

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

My sponsor is Emily Weikert. We talk weekly regarding the project. Emily is on the team that is helping develop the program for our DON/HCC.

**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 consider Pam Richmond to be a mentor to me. Pam is so knowledgeable and enjoys engaging in strategic conversation and has become someone over the years that I bounce my ideas off of prior to sharing with others. We share an office, so we touch base frequently, she has been a wonderful resource to run idea/thoughts past over the last 8 years. I have discussed the clinical leadership program we are developing and shared my thoughts on the direction we are hoping to go.

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

1. Attend train the trainer sessions
2. Survey the DON/HCC regarding topics of interest
3. Select topics for modules
4. Develop objectives/criteria for the modules
5. Present 1 to 2 modules at the Quarterly meetings

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

I enjoy teaching and helping others grow. I try to listen to what the teams' need, instead of pushing my agenda. I am able to set my initiatives aside and view the journey and the end goal. I have learned to be successful in my goals; I need the teams I work with to have bought in.





**Dallas Taylor**

**Organization:** Eliza Bryant Village

**Title:** Director of Nursing

**Name of ALP:** Nursing Staff Retention/ Decrease in Turnover

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

Eliza Bryant Village (EBV) has been around for 122 years serving an elderly population that is in a social economic class that lives below the federal poverty guidelines. The employees who work there strive to treat everyone with the dignity and respect they are entitled to, regardless of race, religion or economic status. For Eliza Bryant Village to continue to be a part of the community for another 100 plus years, we need employees who believe in our mission statement and want to be a part of continuing the legacy of Eliza Bryant Simmons.

This project will save money for my organization by decreasing the overall cost of training new employees every week, and the money saved can be used for other things that are needed in order to attract more customers.

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

To save time and money by focusing on the employees that we currently have instead of the one that we don't. The time that it takes to orient one new staff person can be better spent on boosting current employee morale, by recognizing individual achievements and meeting facility -set goals.

The overall goal is to decrease my company's turnover rate by at least 10% by the end of the quarter.

**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?**

Deborah Enty, LNHA is my sponsor and we have had multiple conversations regarding this topic, and it is of top priority.

**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?**

Deborah Enty, LNHA is very close to this subject as well due to the impact it has on the entire facility. It directly impacts our census and potential customers when deciding if we are a good fit for their loved one. Our existence is crucial to the community and as the Chief Operating Officer of the company she is 100% invested and wants me to succeed with this project. I have weekly staff meetings with HR and I keep her updated on my progress. She provides open and honest feedback and her support of the project will encourage other members of the interdisciplinary team to buy into what I am trying to accomplish.



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

First I need to find out the reason why turnover is so high. I need information from the front-line staff as they are the ones who are in direct communication with new employees.

HR also does exit interviews in person or by phone/ email to employees who have decided to end their employment with EBV to gather information in help in turning around this cycle.

Once I find out what the problems are I need to organize a task force to take charge and give recommendations to start solving the problems. Some problems that are minor and easily solved will be acted upon immediately. Other problems may take more time and thought before they can be solved right away.

Also I need to network with other Long-Term Care facilities that have been faced with a similar situation and what they did that was successful/unsuccessful as a resource.

I want to make sure that before promises are made that we can do what we say we are going to do. Trust is very important and it is the foundation of building relationships with the staff.

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

That my leadership style is very direct and can have a positive or negative effect on others. I know as a DON some decisions that I have to make are non-negotiable. However, I can make an effort to listen to others more carefully and give their ideas and recommendation more thought instead of going with just what I think is best. Everyone wants to be appreciated and recognized by management for their contribution. Knowing more about my team's strengths/weaknesses has also helped me identify team members who can assist me with this project to make it successful and has helped me to understand them better as well. Lastly, communicating to the team members what my expectations are from the beginning increases their chances of being successful to accomplish the team goal.



**Marci Thomas**

**Organization:** The Ohio Eastern Star Home

**Title:** Life Enrichment Coordinator

**Name of ALP:** Enriching Life Enrichment

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

The inspiration of my ALP was providing the resources and knowledge to the life enrichment staff to utilize and grow their strengths. We recently opened four neighborhoods in our nursing center and life enrichment staff was able to choose which neighborhood they wanted to work on. After attending Leading Age Academy, I realize that some life enrichment staff are not working in the correct neighborhoods that best exhibits their strengths; therefore, there is a high level of failure which causes a great deal of frustration. When a department meets its staffs' needs and grows the individual strengths, the staff as a whole can better serve the residents.

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

1. Determine the strengths of each life enrichment team member.
2. Determine which neighborhood will best utilize the team member strengths and continue to help their strengths grow.
3. Continue to educate while resisting barriers that impede communication between life enrichment team and direct staff.
4. Emphasize to staff that new ideas and failures are learning lessons and will not be treated punitively.

**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 the Chief Executive Officer. Communication with Michele has occurred on several occasions, and we will be keeping in contact at least monthly.

**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 yet to select a mentor. I hope to find a mentor that I can trust and guide me through this journey.

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

The next steps are to continue with focusing on the strengths of the life enrichment team members and to make sure they have all of the tools to continue to grow their strengths. Secondly, bi-monthly meetings will continue between life enrichment and other direct staff. Lastly, life enrichment will continue to encourage elders to express their interests and favorite hobbies in an effort to create the most enjoyable activities for them.

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

I have learned that it is essential to maximize the resources you have, while focusing on individual's strengths and not their weaknesses. I have also learned that I need to find a "leader" that will lead the change to help get others excited about such a change.



**Jamie Timoteo**

**Organization:** Plante Moran Living Forward

**Title:** Sr. Vice President

**Name of ALP:** The Project Before the Engagement

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

I work on the vendor side helping senior living providers across the county develop new and/or renovate their existing senior living communities. My ALP is to implement a new analytical tool for our team to utilize when we are presenting to clients who are considering hiring us as their development partners. I was inspired to implement my ALP after thinking about what I would want a development consultant to propose if I was sitting in the provider's shoes. All too often a request for proposal is sent out and vendors, such as my group, will respond and spend the majority of the time talking about past projects and our experience levels. I am working to implement an analysis tool to help client's answer their questions and have constructive dialogue with us during the very first meeting rather than taking weeks to get to this point. Two of the most common questions a client needs answered when working on a development project is "What type of units can the market support and how many?" and "Can I afford to build this project"? The new tool we will use will help answer these questions for our clients during the interview process and begin shaping their strategic planning sessions in the next several months sooner rather than later. This approach will significantly help my organization since it will allow us to immediately show our capabilities to our prospective clients before we are actively engaged. Hence the name "The Project Before the Engagement."

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

One of the primary goals I hope to achieve while working on my ALP is to win more work for our team. Over the next year our team has been tasked with growing by more than 25%. In order to accomplish this task we will need to work on and win more engagements with our current and prospective clients.

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

Dana Wollschlager will be my sponsor during this process. Dana is the group's practice leader for our senior living development division. She and I participate in the majority of our team's proposal responses and interviews with clients and prospects. As a result we are very familiar with the overall process and what has and has not worked in the past. We used the beta version of the analysis tool looking at only the market a client was considering investing in during an interview last quarter and it was received very well and resulted in us being engaged. Dana and I have had several conversations related to the amount of time that needs to be invested into this tool in order to have it fully refined and functional on all proposals moving forward. Dana and I have a weekly meeting to review all pipeline projects and the best way to approach everything that is going on with the practice.



**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?**

Bill Lichwalla will be my mentor during my ALP and serves as the President of Plante Moran's real estate division. Bill has served as a fantastic mentor on other projects through his valuable feedback and creative way to approach new business development opportunities. Bill and I meet monthly to touch base on active projects, work in the pipeline, and to make sure there is enough work life balance.

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

There are several next steps that are important to ensure the success of our new tool. From a market research analysis we have the tool set up so that it is able to determine what the market's need will be depending on how much existing and planned competition is already in the market area. The more difficult aspect to analyze is the financial components on a local level. We are able to run the analysis from a very high-level standpoint but our client's need to know about the local metrics and what is financially feasible. In order to accomplish this, several items will need to be gathered in our firms foot print and then continue to expand each and every quarter:

1. Rents and services
2. Occupancies
3. Wage rates by staffing level
4. Operating margins by service type
5. Construction costs
6. Soft costs
7. Fill up assumptions

The majority of this information is available through subscriptions we have and internally. The portion of the project that will be the most time consuming and important to implement correctly is orchestrating the data gathering from the 220 other health care professionals our firm has across the Midwest and to have them buy into the analysis and follow the process and procedures that are being outlined in order to consistently house all the data year after year and to ensure its accuracy.

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

I have learned two main things during this process. The first is the importance of planning and having a strategy that is executable and reasonable. If I would have dove into the project with no set plan initially I would have discovered several items that we should have addressed out of the gate and we did not because we rushed into executed on the deliverable. By taking the time at the onset of this project we have set out very clear parameters and outcomes we want to accomplish. The second important item I learned about myself during this process is how to get group buy in on the project initially and then to ensure that in order to keep the progress moving forward have individual responsible people for certain aspects of the project and then to regularly touch base on the status. By not initially assigning a responsible person I found that even though the project had a lot of buy in everyone always thought someone else was taking the lead. I also learned that even when there is someone assigned to the project, it is important to check in and make sure they are making progress and answer any questions they may have. When I did not regularly touch base on the project it was easy to put off as a lower priority by the person that was responsible for their tasks.



**Anthony Williams**

**Organization:** Episcopal Retirement Services (ERS)

**Title:** Director of Resident and Health Services

**Name of ALP:** Identify and Communicate Strategies for Promoting Aging in Place in Affordable Living

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

Within ERS's affordable living communities, we strive to assist those we serve to age in place as long as they are able to safely do so. Overall, we have been quite successful with this initiative, however in recent months many team members have reached out to me asking how they can assist and what is their role in helping those we serve to continue aging in place in our communities. From this, the idea came to me to create role-specific guidance that could be provided to team members to help them understand how each individual, in his or her unique role, can help us make progress toward this overarching objective. By pursuing this project, I hope to educate our team members on how they can help our residents age in place. I also hope to continue cultivating a culture within our affordable living communities where each and every team member has a clear understanding of our philosophy on this and how he or she can help us promote it.

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

Through this ALP, I want to help our team members gain a better understanding of how, in their roles, they can help those we serve in our communities to age in place. The content put in this guidance can be used to train and orient new team members, re-educate existing team members, and serve as an ongoing reference document. As previously mentioned, my other primary goal is to continue to cultivate a culture that promotes aging in place for those we serve.

**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 the ALP is Kathy Ison-Lind, Episcopal Retirement Services' Vice President of Affordable Living and In-Home Services. We have discussed this project and the need for this guidance. Once I have developed a draft of the guidance document, I will meet with her in person to review the content before finalizing.

**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?**

Kathy Ison-Lind, Episcopal Retirement Services' Vice President of Affordable Living and In-Home Services, will also serve as my mentor. As I recently transitioned into a new role and division within our organization and I no longer report to Kathy, this mentoring relationship will give me the opportunity to continue to seek out and gain Kathy's insight and wisdom. For my ALP in particular, I hope that Kathy will help me to identify ways to build upon my initial draft guidance by offering me constructive feedback that will help me to think out of the box and improve the content. I will continue to collaborate with Kathy via in-person meetings, e-mail communications, and via phone on this project and on other initiatives moving forward.



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

I believe it is important not to just include in this guidance opportunities I see, from my perspective, for each team member to help our residents age in place, but also to seek out and get input from our current affordable living teams. While I have already met with some key stakeholders from a few departments whose input has been valuable in helping to develop role-specific guidance, I still need to meet with stakeholders from additional departments to get their input prior to finalizing my draft. Following development of my draft guidance, I plan to share with Kathy Ison-Lind. Once final edits are made, I will then share this guidance more broadly with our current affordable living on-site teams and corporate affordable living management team members. I'll also share with our human resources department, so they can utilize it in training moving forward.

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

The hardest part of this process for me was getting it off the ground. While the project itself has not been exceedingly challenging, I found myself debating for quite some time what to pursue as my ALP. When talking with my sponsor, we came up with great idea after great idea early on, but I struggled to decide which would be the best fit for my ALP.

As I reflect on other experiences I've had and the assessments taken throughout Leadership Academy, it is not surprising to me that I had these challenges early on. On my DISC personality description, it stated that I am likely to arrive at a good conclusion but some people may become rather frustrated by my decision making speed. The StrengthsFinder assessment named 'analytical' as one of my top strengths. Taken together and reflecting on this project, I have now found myself trying to be more mindful and open to making a decision without "perfect" information when time-constraints demand quick action.

With regard to not just this project, but Leadership Academy as a whole, the Academy has helped me to grow myself as a leader. Through learning and reflection, the Academy has assisted me in sharpening my talents and leveraging those to better serve ERS and the residents who call our communities home.



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