

leadership academy

2025 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.



Tammy Allison, LNHA

CEO

Fairlawn Retirement Community

Action Learning Project:

Fairlawn Core Value Focus Groups

In 2023, Fairlawn Retirement Community under the leadership of myself and our Director of Human Resources worked with Marketing Essentials to create Core Values and corresponding behaviors for our organization. Our Core Values are : Unity, Purpose, Compassion, and Connection. It has been my passion to identify creative ways to impactfully weave our Core Values into our everyday culture.

Utilizing these four Core Values, I worked with our Lead team to determine five focus area that we will implement with community facilitators. Our five areas are: (1) The First 30 Days, (2) Recognition and Appreciation, (3) Bridging the Gap between Departments, (4) Communication, and (5) Customer Service.

Our mid-level managers and administration team members will work with these outside facilitators who have local ties to Fairlawn to develop a project that corresponds to their Focus area while also ensuring Core Values are incorporated.

What inspired you to choose your ALP?

I am extremely passionate about improving the entire culture at Fairlawn. It is my hope that this will then permeate and spill into the employee experience, the resident experience, and the community perception of Fairlawn. Also, I am hoping to see improved retention, especially in the first 30 days, as a result. I also want to continue to find creative ways to create self-awareness of our Core Values so that they become everyday words and expectations for our staff.

How will this ALP impact your organization and/or greater community or field?

It will improve the culture of our organization. When the culture is healthy, the residents and the community can sense this. We are already receiving positive feedback about our culture improving so this project will continue to help on this continuous journey.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

Goal 1: Better Employee Satisfaction across all departments

Goal 2: Improved retention, especially in the first 30 days

Goal 3: Staff to truly feel heard and valued as an integral part of our overall campus success

Goal 4: To create an ongoing spirit and focus of employee engagement that also includes informal leadership



How will you measure the success of these goals?

- Before and after employee engagement surveys
- Retention statistics
- Turnover rates
- Resident satisfaction (happy staff, make happy residents)- Resident Council, Good Neighbor rounds

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

Retention turnover reduction, agency use reduction, positioning ourselves to be an employer of choice in the community.

What is your plan to keep your sponsor engaged with your work?

Updates at Board meetings and QAPI meetings and during my 1-1 meetings with him.

What is the process you have developed in order to complete your ALP?

- Meet with our Lead team members to discuss and map out the plan- this has been completed
- Facilitator meeting was held on June 16th. Facilitators include 3 Board members, 2 past Board members, and 1 Independent Living resident- all have a passion for employee engagement through past professional experience – all are excited and on-board- they voiced the focus area they are most passionate about facilitating
- Lead Team Champions: Director of Human Resources Kari and Nursing Home Administrator Sean- they will take the lead on coordinating the project and will place our mid-managers/admin team members into one of the five groups that our facilitators will be leading
- Team meeting date set for August 1st with our mid level managers/admin team and the facilitators over lunch. It will be a fun reveal of which group an individual will be in
- Group meeting dates to then be determined. They will then work on a project with their facilitator
- Project to be taken to the Lead team before December 1, 2025 for approval (green light, yellow light, or red light) For example- Cedar Point memberships for all staff as the Appreciation and Recognition Focus Group would be a red light for financial reasons – this creates a checks and balance approval process
- Project then to be implemented accordingly for each of the 5 focus areas

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

- Keeping my Lead team engaged
- Ensuring participation from all members without biases or fear of freely speaking up and sharing
- Keeping our facilitators on task to our defined purpose- Team champions will check in and then provide updates to our Lead team at our leadership meetings

What areas of your leadership strengths do you anticipate will be tested during the ALP?

Emotional intelligence differences in terms of relational skills, strengths of each member, DISC differences (we did this last year with our entire team- may be a good time to revisit this and connect back to this- could be helpful for the facilitator if information is provided to them).

How would you like your mentor to support you in your ALP?

I will notify my mentor as she always has good insight for me!!!



Sheri Barlay

Regional Housing Director
United Church Homes

Action Learning Project:

Collaboration Station: A Cross-Departmental Fellowship Model for Mission-Driven Alignment

PBS (Public Broadcasting Service) was established in 1969-1970 to provide a national network for public television stations, offering educational, informative, and cultural programming to the American public. For a newly formed generation of 'latch key' kids like me, PBS shows were my earliest teachers. I learned about The ABC's, branches of government and how to appreciate cultural diversity with shows like Sesame Street, The Electric Company and School House Rock. As an adult, PBS continues to nurture my critical thinking skills and ethical decision-making through shows like Frontline, POV and NOVA.

I have created a Cross-Departmental Fellowship program called United Church Homes-Collaboration Station. The program structure and curriculum development are loosely based on my personal experience with PBS programing and nuanced to our Mission to Transform Aging by Building a Culture of Community, Wholeness and Peace.

UCH - Collaboration Station brings together Fifteen non-management participants, representing all service lines (Affordable Housing, Long Term/Short Term Care, Middle Market Housing, Service Coordination/Naviguide) and Internal Support Staff (accounting/finance, HR, procurement, administrative, marketing, development). Participants would be grouped into Cohorts of 5 members and be assigned a Team Coach for the duration of the fellowship program. The group would meet In Person for a total of four 2-day sessions. Session will be held at different locations showcasing a different Service Line (Affordable Housing, LT/ST Care, Middle Market) with the final session being held at UCH Central Office. Independent reading of a prescribed set of books and Cohort presentations would round out the curricula.

Participants will complete an application for admittance with a review committee selecting the awarded participants. Cohort coaches will be management level employees and reflect the diversity of service lines and include one internal support manager.

The benefits of Collaboration Station include increased efficiency, enhanced innovation, improved communication and stronger employee engagement. Employees will recognize their contribution to the larger mission and understand how their daily work impacts the well-being of residents and the success of the organization. Breaking down silos and fostering teamwork across different departments, United Church Homes Inc. will achieve better problem-solving, optimized business processes, and enjoy a more cohesive and productive work environment. By prioritizing inter-departmental collaboration, United Church Homes Inc. will create a more cohesive, productive and innovative work environment, ultimately leading to greater success and a stronger competitive edge.



United Church Homes - Collaboration Station: Session Theme and Outcomes

Session 1 – Theme: Foundational Learning

Outcome: Literacy across service lines - Build a UCH Dictionary; Identify 'Your' Customer; Use assessment tools to build Self-Awareness.

Session 2 – Theme: Professional Skill Building

Outcome: Speak and write confidently and persuasively. Use conflict resolution skills. Understand the role of compliance and regulatory restrictions in service lines.

Session 3 – Theme: Creative Problem Solving

Outcome: Suggested Solutions for Real Life UCH challenge

Session 4 – Ethics In Decision Making

Outcome: Articulate and apply Ethical Principles in decision making.

Session Themes in Depth

SESSION 1 – Foundational Learning: Sesame Street

- **Literacy** – When different departments use different terms for the same task, it can hinder communication and collaboration. To address this, it's beneficial to establish a common vocabulary for cross-departmental communication, while still allowing individual teams to use their specialized language internally. This approach ensures clarity for all parties involved and prevents misunderstandings.
 - Build a UCH Dictionary and Thesaurus
- **Customer Service** – understanding your internal customers is just as critical as understanding your external ones. Internal customers are individuals or departments within your organization that rely on your work, output, or services to do their own jobs effectively.
 - Who uses the output of my work?
 - Who needs information and resources from me?
 - What are the dependencies between the teams I touch?
- **Self-Awareness** - improved emotional regulation, enhanced communication, better decision-making, stronger relationships, and increased confidence. It also fosters empathy, promotes a growth mindset, and leads to greater job satisfaction.
 - Emotional Intelligence
 - DISC
 - Clifton StrengthsFinder

SESSION 2 – Professional Skills building: The Electric Company

- **Effective Communication** reduces confusion and misunderstanding; strong communication skills build trust and collaboration.
 - Public Speaking
 - Professional Writing
 - Conflict Resolution
- **Compliance and regulatory guidelines** are essential to ensuring ethical, safe, and legally sound care. They not only protect the residents but also support the facility's reputation, operational efficiency, and financial sustainability. They are not just legal obligations but strategic tools for long-term success.
 - How are service lines funded?
 - The impact of compliance/inspections on day-to-day operations
 - Trending Now and beyond



- **Team Building** – activities and processes that aim to improve collaboration within a group. It involves enhancing communication, trust, and problem-solving skills while fostering a sense of camaraderie and shared purpose. Effective team building can lead to increased productivity, improved morale, and a more positive working environment.
 - Communication exercises
 - Collaborative games

SESSION 3 – Creative problem solving, adaptability and strategic thinking: Contact 1 2 3

In senior care, creative problem-solving helps generate better ways to care for residents, operational efficiency ensures those solutions are implemented effectively, and innovation transforms both care and operations for long-term success. Together, they create a high-performing, resident-centered environment.

- **Creative problem-solving** is the ability to approach challenges with fresh perspectives and develop practical, resident-focused solutions that go beyond routine thinking.
 - Fellows will be presented with an existing problem within UCH. Executive staff will provide ‘the problem’
- **Operational efficiency** ensures that care processes are delivered in the most streamlined, cost-effective, and timely manner without sacrificing quality.
 - Fellows will be presented with an existing ‘operational scenario by Executive staff.
- **Innovation** is the application of new ideas, technologies, or methods to transform and elevate the standard of care across all service lines.
 - Fellows will devise solutions to the two preselected problems above

SESSION 4 – Ethical decision making: Frontline

- **Decision-making and ethics play** a foundational role in affordable housing and senior care, where the most vulnerable populations are served. These sectors require leaders and staff to balance resource constraints with compassion, fairness, and regulatory obligations. Executive Team would participate in this session at UCH Central Office.
 - **Core Ethical Principles** – Defined as
 - Equity
 - Autonomy
 - Benefice
 - Justice
 - Transparency
 - **Ethical Decision Making** involves choosing actions that are fair, transparent, and respectful of human dignity, even when faced with financial, legal, or operational pressures.
 - Real World Case Study: Raising Liberty Town Documentary and Discussion
 - **Balancing Ethics and Financial Constraints** is one of the most complex and critical responsibilities in affordable housing and senior care. Leaders and staff must continuously make decisions that uphold human dignity and care standards, even when operating with limited resources.
 - The Ethical Imperative = Core Values
 - Financial Reality = Straight talk from Finance
 - Common Scenarios from the inside
 - Strategies to balance both Mission VS Margin

Although the outcome of Collaboration Station is not specific to Leadership Development, a United Church Homes, Inc. leadership program could be created as a follow up like the PBS Executive and Leadership Development program called The Next Generation Leadership Program.



What inspired you to choose your ALP?

As the sole Fellow from an Affordable Housing Service Line in the 2025 Leading Age Ohio- Leadership Academy, I observed a shared passion to serve Seniors and the challenges to deliver a quality and sustainable Supportive Senior Living product. I was particularly fascinated by the diversity of spoken language and policy and compliance requirements among the participants. I likened this experience to Pentecost as described in New Testament, specifically in Acts 2:1-4, where the Apostles were gathered in one place, and a sound like a mighty wind filled the room, with tongues of fire appearing and resting on each of them. This empowered them to speak in different languages, enabling them to communicate the message of Jesus to people from various nations. With each Leadership session, language barriers eroded, common challenges were illuminated and by the third session, it was as if the Holy Spirit opened my ears and eyes to HEAR and SEE the beauty of the mission we fellows share.

How will this ALP impact your organization and/or greater community or field?

A Cross-Departmental Fellowship program can foster meaningful dialogue and knowledge exchange between Customer-Facing and Internal Support teams. It can empower participants to develop cross-functional fluency, deepen empathy for shared challenges, and co-create innovative solutions. For United Church Homes, Inc and other organizations to thrive in the evolving landscape of Supportive Senior Living, providers must embrace agility and adaptability. Organizations that invest in cultivating employee versatility, insight, and resilience will be better equipped to meet the dynamic needs of the aging population and navigate shifting policy and regulatory environments.

What are the goals for your organization and/or greater community that you hope to accomplish with your ALP?

Goal 1: Increased employee engagement and retention

Goal 2: Identification of opportunities for the streamlining of processes

Goal 3: Boosted innovation with improved alignment across departments

How will you measure the success of these goals?

Each participant and cohort would:

- Measure employee retention and mobility within the organization
- Quantify the value of shared tech tools, or the elimination of duplicate processes
- Conduct Pre/Post participant surveys and interviews.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities? What is your plan to keep your sponsor engaged with your work?

My sponsor, Dan Fagan, VP Housing/Care is my sponsor. He has expressed excitement and support for this ALP and believes that this program fits the needs and priorities of United Church Homes. Dan and I have a weekly One on One where Collaboration Station can be a regular agenda item. We will continue to flesh out the program details such as Leader and Participant guidelines as well as Curriculum Materials and Financial requirements.

What is the process you have developed to complete your ALP?

- Continue to meet with sponsor to identify critical stakeholders and define participant and leader roles and obligations.
- Identify when and where to present the program ie: the UCH Innovation Committee, executive leadership
- Identify funding sources ie: grants, donations
- Establish the Collaboration Station development team and timeline to launch.



Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

- I may find that there is a similar initiative in the planning stages. If so, I will ask to be added to the development team.
- Company financial limitations could place a burden and require alternative funding sources. Funding source criteria may require program retrofitting or adjustments.
- A lack of interest or participant availability from Service Lines or Internal Departments could require rewriting to make program more appealing.
- Lack of Executive support.

What areas of your leadership strengths do you anticipate will be tested during the ALP?

The results from my DISC and StrengthsFinder evaluations are at times incongruent and complicated yet curious and complementary. Come to find out, I'm a fascinating individual!

My DISC profile HIGHS = I Interactive and S Stabilizing and LOWS = D Decisive and C Cautious emphasize that my natural charm and charisma will prove useful as I seek to 'sell' Collaboration Station' to stakeholders, but it will be important not to be overconfident or wordy. Remaining focused on and communicating outcomes and organizational benefits will be key. Keeping realistic expectations of the overall process as I move to gain acceptance and implementation will be important.

My STRENGTHFINDERS profile highlights my top five strengths as Achiever, Relator, Maximizer, Focus and Connectedness. It will be imperative when pulling together the development and implementation team, I seek out members with Strengths in the Strategic Thinking grouping. This can ensure that necessary/critical details are not left out. Team members with Influencer strengths will keep Collaboration Station aligned with Critical Stakeholder goals. When gathering a development team, it will be important to have Green, Blue and Black Hat (De Bono's Six Thinking Hats) members. Having members with varied Colored Hats will help the project remain agile and on track. It will be important that I celebrate benchmarks along the way, pause, reflect and pivot when necessary. Regular and continued meetings with my sponsor will ensure that I am thinking strategically.

How were your mentor(s) involved in your ALP?

My mentors, Russ and Elisa Blackwell have served as my Life Coaches and Professional Mentors for 30 years. They are aware of my participation in the LAO Leadership Academy and my Passion Project. I can count on them to exercise my Strategic Thinking muscles and temper my Achiever tendencies as I pursue the successful implementation of Collaboration Station.



Kaneshia Boyd

Nursing Home Administrator
The Gardens of McGregor

Action Learning Project:

Safe and Reliable Transportation for Employees

This ALP is designed to address a common but often overlooked barrier to workforce stability: transportation insecurity among employees. The project will develop a Safe and Reliable Transportation Support System utilizing a blend of Lyft ride credits, RTA passes, and coworker-based rideshare coordination. The goal is to ensure that employees have consistent, affordable, and safe transportation to and from work, especially during off-peak hours when public transit may be limited or unavailable.

What inspired you to choose your ALP?

The idea for this ALP emerged from real-world challenges faced by staff who struggle to arrive on time or miss work entirely due to unreliable transportation. As someone responsible for supporting employee success and retention, I've seen the direct correlation between missed shifts and lack of dependable transportation options. This project is rooted in a desire to remove those logistical hurdles and create a work environment that supports both attendance and well-being.

How will this ALP impact your organization and/or greater community or field?

By implementing this transportation solution, the organization can expect:

- Improved employee attendance and punctuality
- Higher job satisfaction and morale
- Reduction in turnover caused by external barriers
- Enhanced recruitment appeal, especially for candidates without personal vehicles
- A model that supports the organization's equity and inclusion goals

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

1. Reduce tardiness and absenteeism caused by transportation issues.
2. Increase employee retention, especially among entry-level and second/third-shift staff.
3. Improve job satisfaction through reduced stress and improved work-life balance.
4. Foster team connectivity through voluntary coworker ridesharing.
5. Establish a scalable transportation assistance model for other facilities or departments.



How will you measure the success of these goals?

- Pre- and post-project employee surveys on transportation stress, job satisfaction, and dependability.
- Data analysis on lateness and absenteeism trends before and after implementation.
- Participation rates in Lyft, RTA subsidies, and the coworker rideshare program.
- Focus groups and one-on-one interviews with participating employees for insights

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities? What is your plan to keep your sponsor engaged with your work?

This ALP directly aligns with our organizational priorities around employee engagement, workforce stability, and operational efficiency. My sponsor recognizes that reliable transportation is a foundational need for frontline staff and fully supports the initiative. We share a vision of creating systems that remove barriers and promote long-term employment.

To keep my sponsor engaged:

- I will provide bi-weekly progress updates via email or meetings.
- I will include my sponsor in project milestone events and midpoint evaluations.
- I will actively request input on budget alignment, communication strategy, and policy implications.

What is the process you have developed to complete your ALP?

Quarter 3

- Conduct baseline employee survey and assess transportation needs ;
- Coordinate partnerships with Lyft and RTA;
- Recruit coworker rideshare volunteers pilot the program with selected participants; provide training and orientation.

Quarter 4

- Monitor usage and collect real-time feedback; troubleshoot logistics.
- Conduct mid-project survey; adjust protocols based on employee input.
- Evaluate outcomes, share results, and present recommendations for improvements.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

Potential challenges:

- Low engagement due to privacy concerns or scheduling mismatches
- Budgetary constraints related to subsidies or incentives
- Logistical coordination issues with external partners

Mitigation strategies:

- Provide clear, transparent communication about safety, scheduling, and costs
- Offer multiple transportation options (not a one-size-fits-all model)
- Use anonymous feedback channels to quickly surface and resolve concerns

To ensure adaptability:

- The team will meet monthly to reassess goals and processes
- Data will be reviewed in real-time to identify areas of concern
- The feedback loop will stay open, and course corrections will be welcomed



What areas of your leadership strengths do you anticipate will be tested during the ALP?

As a High “D” in the DISC model, I naturally prefer to make quick decisions and keep things moving forward. Much of my professional role requires fast-paced thinking and action, often with limited information. However, this project will challenge that tendency. It will require me to intentionally slow down, gather and analyze data, and make informed decisions in collaboration with others. Additionally, I will need to adjust to the pace of multiple stakeholders each with their own timelines and input rather than driving the process solely on my own schedule. This shift will stretch my leadership capacity by requiring patience, strategic listening, and a more collaborative decision-making style.



Brandy Christiansen

Executive Director
National Church Residences

Action Learning Project

To create framework within the organizational structure for the Assisted Living Conversion Programs that will be successful for day-to-day operations both for Senior Living and Housing.

What inspired you to choose your ALP?

I have worked in the ALCP's for 10 years and have a goal to see all 4 of these buildings be successful with operations and KPI's across the board.

How will this ALP impact your organization and/or greater community or field?

Streamlining the organizational structure of these buildings will ensure consistent processes in all 4 ALCP's. Currently all 4 ALCP's operate slightly differently which causes outcomes to differ facility to facility. With consistent processes that are effective, we should be able to meet KPI's and budgets more efficiently as a team.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

The ALCP facilities are much needed in all our communities. They serve a population of low-income seniors who otherwise could be in LTC facilities, homeless, or underserved in Independent Living communities. By improving our processes and therefore improving our KPI's and budgets, we make the ALCP's more sustainable and successful.

How will you measure the success of these goals?

We will measure the satisfaction of the ALP by comparing metrics from the current budget and KPI's to those of the future.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities? What is your plan to keep your sponsor engaged with your work?

This is something that has been discussed at our organization about being needed for quite a while. My sponsor supports this project, and it is aligned with both the organizational goals and my professional goals. Currently I meet with my sponsor at least monthly, and plan to discuss this at those meetings.



What is the process you have developed to complete your ALP?

I would like to work on this throughout the next year. I would like to collaborate with other Executive Directors involved in the ALCP buildings in addition to key employees for different roles. (ex. Property manager, don, service coordinator, bom) I would like to identify a team of individuals to assist in the project and have their agreement by 9/1/25. After that we will start to meet to develop and discuss an organizational flow chart that supports all 4 buildings.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

With the right group of individuals, we have the potential to reshape the project based on experience and thoughts. I think it could derail if we branch off into discussing specific processes or issues in these buildings rather than sticking with the organizational structure first. Sticking with the KPI's for both housing and healthcare and not venturing outside of the already identified KPI's will keep my ALP on track.

What areas of your leadership strengths do you anticipate will be tested during the ALP?

The first thing that comes to mind is staying focused on the goal of the project and not trying to fix everything along the way. Being an "I" I can derail easily and need to ensure staying focused on the big picture and not the small day to day issues that come up as we are working towards the ALP.



Megan Cisler

Executive Director
Judson Senior Living

Action Learning Project: Associate Marketplace

The goal is to establish an associate marketplace, operating similarly to a food pantry, to support associates in need or during a crisis. The use of the marketplace would be based on a confidential attestation by the associate that they meet established income requirements or present with a verifiable crisis. The criteria would mirror requirements for food pantries in the greater community. Resources available at the marketplace would include food such as produce and a mix of perishable and non-perishable items, in addition to basic care items, including diapers, wipes, and other personal care items.

The associate marketplace would require a team of select management to oversee ordering and inventory, monitoring of the program, and maintaining relationships with suppliers such as the Greater Cleveland Foodbank. The program would be reliant on volunteers to run the marketplace during operating hours. Due to the sensitive nature of the program, the selection of volunteers would have to be thoughtful and vetted to understand the comfort level of associates accessing services through the marketplace. Maintaining an inventory of the most needed items not available through supplies or other resources would most likely require the involvement and financial support of the Judson Foundation and grateful donors.

Further information, details, and analysis are still required to determine the best operating procedures for the organization.

What inspired you to choose your ALP?

The inspiration for the associate marketplace came from various avenues. At the core of the inspiration is Judson's focus on "Associates Matter" as a strategic priority. Associates Matter means developing Judson as an Employer of Choice, that, in alignment with their core values, offers a culture of engagement and empowerment, competitive offerings that attract and retain talent, and develops, motivates, and inspires their diverse workforce. Judson wants to create an environment where associates feel supported and valued not only for their role in the services they provide to the organization, but also as individuals.

What has been most inspirational for me is that in my role as Executive Director, I have come to learn some of the real-life challenges my associates face daily. There are basic needs that some of our associates are struggling to meet. From working multiple jobs to provide food for their families, unreliable transportation, lack of childcare, and unsafe living conditions, there are very real life barriers that impact their lives both inside and outside the working environment. Judson at University Circle draws associates from the East Cleveland area, where the median income is \$22,883, and 44.3% of people live in poverty (U.S. Census Bureau). Judson is asking how they can help support associates? What are the ways we can develop, motivate, empower, and engage associates to position them for success as individuals and as members of the Judson community?



To solidify the inspiration, in the past, Executive Leadership had discussed the concept of a food pantry for associates. However, concerns were raised regarding the feasibility as well as the sensitive nature of the proposal, and the idea was placed on hold. During Leadership Academy, I discovered that McGregor currently provides a successful food pantry program for employees, which inspired me to reopen the conversation and possibility.

How will this ALP impact your organization and/or greater community or field?

The associate marketplace has the potential to increase associate job satisfaction and potentially lead to greater benefits of employee productivity, retention, and recruitment. By developing ways to support associates, in addition to pay and benefits, Judson can create a culture of respect and loyalty. Others seeking employment may be drawn to the investment Judson is willing to make in supporting employees. If an associate can fulfill their basic needs, they have more freedom to grow and focus on other areas of their lives and work.

Although pay and benefits will always be a priority for job seekers, the job market is also showing that job seekers are looking for organizations that can offer alternative means of support and benefits. As senior living and aging services continue to struggle with recruitment, developing new initiatives and innovative programs will be necessary to remain competitive in the market. Something like the marketplace could prove useful to similar organizations trying to attract direct care workers or front-line staff, who often receive lower wages.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

Goals for the associate marketplace include:

- Utilization of the service and inventory, and eliminating some barriers for associates.
- Increase in associate job satisfaction, engagement levels, and positively change the perception of support.

How will you measure the success of these goals?

Tracking the number of associates using the marketplace per month will provide an accurate gauge of utilization as well as potentially identify patterns of use and inventory. In addition, participants could have the opportunity to complete an anonymous survey or comment cards regarding their experience using the marketplace. Due to the sensitive nature of the program, any measurement would have to consider privacy and confidentiality as a primary concern.

Judson recently completed an associate engagement survey, which was last done in 2018. Dimensions of engagement were measured, including areas such as organizational culture, safety, employee development, and diversity, equity, and inclusion. In particular, questions about employee benefits scored lower on the engagement scale. Once implemented, using future engagement surveys and resulting focus groups can help measure the effectiveness of programs like the associate marketplace as evidenced by increased scores in engagement and feelings of development, benefits, and inclusion.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities? What is your plan to keep your sponsor engaged with your work?

Through conversations, experiences, terminations, disciplinary actions, low retention and turnover, stories, and surveys, associates have identified having unmet needs. Judson has committed to making Associates Matter a strategic priority, and implementing an associate marketplace may help provide an extra level of support and benefit to the associates, with the hopes of contributing to greater job satisfaction, employee development, and improved retention and turnover. Judson's goal is to find effective ways to support and give back to associates in ways that are meaningful to them.



As part of the Executive Leadership Team, I have the advantage of working directly with my sponsor regularly. I plan to keep my sponsor engaged by practicing good communication and providing regular updates. The intention is to also engage the Executive Leadership Team in dialogue and planning, thus keeping the project at the forefront of our regular meetings.

What is the process you have developed to complete your ALP?

Months 1-2:

Based on the sensitive nature of a needs-based program for associates, the majority of time will be spent researching similar programs and working closely to learn effective operations with those who have successfully implemented a similar program. In particular, I will be meeting with key personnel at McGregor to obtain a detailed understanding of their operations and the connections needed to run the program. I anticipate this will take 1-2 months to meet, shadow, and make appropriate connections.

Months 3-9:

Once I have been able to collect enough data and information, I will establish a proposal and present the information to the Executive Leadership Team for review. Key members on the leadership team that will be critical in moving the program forward are the campus Executive Directors, the Vice President of Human Resources, the Executive Director of Community Life, the Vice President of the Judson Foundation, and the President and CEO. I anticipate this will take another 1-6 months to determine best practices for the organization, discuss operational plans to assign responsibility and identify a location, volunteer recruitment (associates or volunteer department), and plans to establish funding opportunities. The planning and discussions can occur during weekly Leadership Team meetings. Based on the discussion with the team, during this planning process, I will also need to include our Director of Volunteers and Dining Directors in the discussion as decisions are made on operations and execution. After several months of discussion with those closely connected to the program, I will document a final formalized plan with a timeline for roll-out and a communication plan for the organization.

Months 10-12:

Once a final plan has been developed, I will work with Human Resources to communicate to associates about the program. Communication and education will first be provided to Managers across campuses so that they can help explain, support, and champion the program to their direct reports. Information and education will most likely be provided during a regular Managers Meeting and follow-up through email. Once Managers are knowledgeable and comfortable with the program, communication and education will be provided to all staff. I anticipate this process to take 1 month.

The timing and implementation of the associate marketplace will be based on other organizational initiatives at the time that may take precedence. However, I anticipate the program can be formalized and implemented within 12 months. I also see the potential for McGregor and Judson to support one another and the surrounding community of associates by working together and providing a great number of opportunities for associates who need access to a food bank or emergency supplies.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

When working with a group, it can be a challenge to engage everyone on a level that is needed to make something succeed. I would be asking team members who already have numerous commitments and their own agendas to accomplish, to add another item to their list. If I cannot motivate the group, find a first follower, and keep the group motivated, there is the potential for the project to stall and never come to fruition. With the number of people involved in planning, there will also be a large number of opinions. I am sure all will bring very valid information and insight to the process, but again, there is the potential to derail the project if the team does not stay focused on the goal. On the other hand, with the different views and areas of expertise present, new ideas may emerge that could reshape how the project in a way that requires moving in a different direction than originally planned.



There may also be a risk of not finding willing associates or volunteers to work the program. The program would be asking others to take on additional responsibilities.

In addition, there may also be challenges with fundraising to provide for items not available through other resources, such as personal care items. How do you fund monies so that they do not compete with other Foundation goals, and also navigate resident involvement, as there are currently negative feelings that stem from associates toward residents.

To help keep the group engaged, I will focus on providing regular reviews of goals and progress. Intentionally dedicating portions of meetings to reviewing performance metrics, progress toward goals, and milestones. This can help keep the focus on results and help the team to change course when needed. Instead of rewarding individual achievements, I can structure recognition and celebration around the team's success, fostering a sense of collective responsibility.

What areas of your leadership strengths (think DISC/Strengths Finders) do you anticipate will be tested during the ALP?

As a high S, my strengths lie in organization, collaboration, attention to detail, and consistency. I like to think in quiet with focused work, independently, and feel confident and comfortable knowing all of the options. Stability is very important to me, and I like it when there is a clear process and standards. Knowing what to expect is comfortable. I also present as an achiever, or someone who is satisfied by staying busy and producing results.

I will do well with the research component because it is primarily individual work and I will feel comfortable gathering "the facts" and analyzing to understand why and how (I also scored a high C) best practices work. However, I will be challenged to work in a group where there will be conflict and disagreement (Harmony is also a strength), and because it is a new program, a lot of unanswered questions and unknowns. As an achiever, I'm going to want to push forward to obtain the result, but I will have to take a step back and take time for individuals in the group who are more relational and high Is.



Tom Durbin

Executive Director
Ohio Living

Action Learning Project: Skilled Nursing Memory Care

To provide memory care programming to skilled nursing residents.

What inspired you to choose your ALP?

It's a needed level of care at my community.

How will this ALP impact your organization and/or greater community or field?

It will allow us to provide memory care programming in the Skilled Nursing Facility after residents progress past the Assisted Living.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

My goal is provide a higher level of care to residents that need memory care.

How will you measure the success of these goals?

Decreased falls and behaviors. Decreased discharges to competing snfs with Memory care units.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

It's the next logical step after we implement the Hearthstone memory care program in the AL.

What is your plan to keep your sponsor engaged with your work?

Continual follow up on the process to educate staff. My sponsors engagement wont be an issue. Her role in the company is implementing memory care programs.

What is the process you have developed to complete your ALP?

The first step is implementing memory care in the AL. That process has already been started. Once that is completed over the next year, we will look at implementing Memory Care in the SNF. We are realistically 2 years away from completion.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

Weekly follow up with clinical team after project is initiated and training begins. This will be a very detailed step by step implementation. I do not anticipate having any issues.



Brian Hill

Executive Director
Otterbein SeniorLife

Action Learning Project:

Licensed Nursing Home Administrator (LNHA)
Mentorship Program

Otterbein Senior Life, a leader in innovative senior care, operates nine Green House-style skilled nursing facilities that emphasize person centered care, autonomy, and community. To support the professional growth and success of newly hired LNHA's, this proposal outlines the development of a structured mentorship program. This program aims to foster leadership development, enhance operational excellence, and ensure alignment with Otterbein's mission. By pairing new LNHA's or LNHA's within their first three years of employment with Otterbein Senior Life, with experienced mentors, the program will address challenges such as expense management, regulatory compliance, staff engagement, and resident-centered care delivery, ultimately improving retention rates of LNHA's and operational performance.

What inspired you to choose your ALP?

This ALP was selected by the author as a result of 20+ year tenure in the industry and witnessed trends of newly hired LNHA's terminated early in their tenure with LTC Providers. A 2023 study found that, on average, 11.6% of administrators in US nursing homes were new hires within their first 90-day introductory period. A 2000 study noted that 37% of LNHA's left their positions (voluntary and involuntarily) within the first three years of employment, with 75% of involuntary separations occurring during this three year period. This study suggested that LNHAs who remain beyond three years are more likely to stay longer, indicating that retention improve with tenure. Development of this ALP also meets the Otterbein Experience Behaviors of Sharing Our Knowledge and Expertise by proactively sharing knowledge and expertise to help others.

LNHA role is complex, requiring expertise in regulatory compliance, financial management, staff leadership, and resident care. The Green House model adds an additional layer of complexity due to emphasis on elder autonomy, staff empowerment, and non-traditional settings. Research showed that mentorship improve job satisfaction, reduces turnover, and enhances leadership competency (Leading Age, 2023).

How will this ALP impact your organization and/or greater community or field? What are the goals you hope to accomplish with your ALP

- Accelerate onboarding of newly hired LNHA in understanding of Otterbein's operational processes and culture embodying Otterbein's mission, vision and values.
- Improved Retention Rates of newly hired LNHAs at Otterbein.
- Improvement of operational metrics as measured by improved PPD expense management and profit margin.
- Develop competencies in leadership, communication, and decision making.
- Improve regulatory compliance.
- Foster professional growth by building confidence and resilience to reduce burnout and improve retention.



What is the process you have developed to complete your ALP?

Mentor Selection:

- Primary mentor to be identified as experienced LNHAs within small house neighborhoods who exemplify leadership or are subject matter experts within a specific area identified as an opportunity for improvement of newly hired LNHAs.
- Primary mentor (Mentor) will/may collaborate with subject matter experts in various areas to provide expertise and learning. Examples may include, clinical representative, MDS, accountant, etc.
- Consider use of AIT for mentor to oversee which would allow for LNHA development and succession planning as well as allowing mentor more time to be off site assisting mentees.

Mentee Assignment:

- Pair each new LNHA with a mentor based on specific criteria such as facility type (neighborhood vs. life style community), personal interests, professional goals and or specific operational needs of the facility.
- Geographic proximity to facilitate in person meetings and site visit would be preferable to foster relationship between mentor and mentee.
- Consider utilizing DISC or StrengthsFinder to help pair mentor and mentee.
- Consider development of a skills needs assessment for newly hired LNHA. Consider utilizing platforms already in use within Otterbein like Relias.

Program Components:

• One on One Mentorship.

1. Monthly meetings (or more often if needed for acute situation assistance), preferably in person, or virtual based on Mentee or neighborhood needs.
2. Prioritization of educational topics/needs of the Mentee or neighborhood will be used to develop training plan.
 - a. Emphasis poor performing metrics. To be identified by VP/AVP.
 - b. Can the training plan mirror the Guide Training Binder and Competency Checklist?

• GreenHouse Model Training

1. Training Courses Pioneer Network/GreenHouse Project. GreenHouse philosophies.
2. Site visits by Mentee to other Small House Neighborhoods for review.

• Leadership Development Training

1. Quarterly workshop through Leading Age Ohio or Otterbein internal staff development programs.
2. Relevant topics such as emotional intelligence and conflict resolution.

• Resources Needed

1. Otterbein Guide Training Binder
2. Best Practice Tools and Resources. Forms and processes used for expense management, PPDs, key performance areas, etc.
3. Regulatory Resources
4. GreenHouse Resources
 - a. Encore (GHP), an application available through Apple and Google play store, has a series of modules to go through that teach you about the Green House Project.
 - b. Green House Project's, "Guide Essentials" course would be a possible resource in providing education on newly hired LNHA/Guides. Guide = Coach in Green House vernacular. Currently being trialed with Otterbein newly hired Coach's.
5. Office Supplies – Minimal. If AIT is part of this equation, then will need computer and phone for AIT. Zoom account for virtual meetings.
6. Travel – As needed site visits and mileage reimbursement for Mentor.
7. Course registration fees for leadership development coursework through Leading Age Ohio, GreenHouse Network, and CEU registration fees.



Mentorship Phases:

1. Orientation Phase (Month 1): Introduction to the program and initial goal setting.
2. Development Phase (Months 2-24): Regular one-on-one meetings, shadowing opportunities, and skill-building workshops. Will meet minimum of monthly in person and weekly Zoom/telephone calls.
3. Reflection Phase (Month 13): Evaluation of progress, feedback sessions, and consideration of future goals.

How will you measure the success of these goals?

Successfulness of ALP will be measured by:

1. Conduct surveys and feedback sessions with participants to assess program impact and areas for improvement.
2. Improvement of Performance Metrics:
 - a. Improvement in PPD expense management as measured by reduction in PPD amounts compared to levels experienced prior to program initiation.
 - b. Improvement in financial performance of neighborhood.
 - c. Retention of new LNHA's at or above 85% after two years.
 - d. Mentee performance in areas of regulatory compliance (survey outcomes and complaint frequency, staff retention, elder satisfaction).
3. Analyze turnover rates and job satisfaction levels pre- and post-program implementation.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

ALP aligns with Otterbein's Mission of "Inspired by faith we strive to enrich individual life journeys for all." Otterbein's Mission does not delineate between elders and partners and by providing newly hired LNHA with resources to increase their chance of success, we are supporting our mission benefiting all parties. Additionally, this proposed ALP meets many of the Otterbein Experience Behaviors, behaviors that have been identified to be desirable. This ALP supports the following Otterbein Experience Behaviors:

- Take time to listen to and understand others.
- Help and support others within and across departments, locations, and services.
- Be flexible and adapt to change.
- Identify opportunities for improvement and take action.
- Be responsible in using resources.
- Continually seek to improve your skill and knowledge.
- Proactively share knowledge and expertise to help others.

What is your plan to keep your sponsor engaged with your work?

My sponsor will be involved in the recruitment of LNHA/Guides for Otterbein's portfolio of 9 small house campuses. Potential mentees will be identified at time of hire/orientation for placement. Sponsor has a vested interest in the development and retention of successful LNHA's.

Otterbein Senior Life currently has an initiative and work group to improve the onboarding experience of newly hired Senior Leadership Team (SLT) members. This ALP would directly support this initiative as LNHA/Guide is a member of the SLT.

Other Otterbein partners that may need to be included in the development of this ALP include Wes Calton, AVP People and Culture and Shonia Russell, VP Marketing as they chair the SLT subcommittee assigned to improving onboarding experience.



Which of the steps in the process description have the potential to reshape your project or even potentially derail it?

1. Mentee engagement. Priorities of mentee and mentor need to be aligned and supported by leadership.
2. Alignment with Green House model.
 - a. Some suggest pairing based on complementary skills rather than similar backgrounds. This could offer fresh perspectives and enhance problem-solving.
 - b. In cases where a mentee feels mismatched with a mentor, have a process in place for reassignment to ensure the relationship is beneficial.

This mentorship program is designed to not only support our new administrators in critical areas of operations, leadership development, regulatory compliance, and alignment with the GreenHouse model. Goal of program is to enhance the successfulness of newly hired administrators, improve facility outcomes, and reinforce Otterbein's commitment to being "The Place To Work" for newly hired LNHAs.



Megan King

Assistant Director of Nursing
Kendal at Oberlin

Action Learning Project:

Standardizing EHR Training and Documentation
Practices for Nurse Managers

The goal of this project is to initiate a new EHR orientation process for all Nurse Managers to use at Kendal at Oberlin. We want to utilize the EHR to its full potential, so all current Nurse Managers and the onboarding of newly-hired Nurse Managers will be trained and implement the same documentation process. This differs from our current process as each Nurse Manager utilizes the EHR system (Matrix) in their own capacity. Our current process hasn't required all nurse managers to fulfill the same requirements such as placing RX orders, adding care plans, charting compliance, vital reports or simply adding the shower schedule to a patient's plan of care. This has made the workload extremely uneven with few nurses having to enter all the information for all patients. Overall, we want all nurse managers to be able to complete all steps of a patient's care, including the documentation so the workload is distributed more evenly and any nurse will be able to step in at any point if needed.

What inspired you to choose your ALP?

Kendal has been using Matrix for many years, and the training on the system for new hires has been diminishing. Unfortunately, this is because right now training new hires consists of 1:1 time with the 'super user' of the EHR system. Often the sole 'super user' at the facility gets pulled in many other directions as they are the ADON and MDS Coordinator at the facility. This means the valuable time orientating a new staff member is greatly shortened because of other job responsibilities. This results in new employees not understanding the full potential of the EHR system and how to use it most efficiently. It's ultimately an unjust service, causing problems further down the road when documentation is lacking or not done correctly or in its entirety due to the poor understanding of the EHR system. A few examples of current failures of the process include the inability for nurse managers to add/modify to care plans/AL service plans, utilize the workflow tasks, and utilize various reports within Matrix (ie: charting compliance report for STNAs).

How will this ALP impact your organization and/or greater community or field? What are the goals you hope to accomplish with your ALP

This ALP will improve our organization in many ways, but most importantly all documentation expectations will be met. This includes several documentation requirements such as admission documentation, notable events such as a fall, or change in status (health condition). This will improve quality care in a number of ways including: medication or treatment planning, patient monitoring and staff communication. Resident safety and quality of care will improve with accurate and timely documentation that can be done by any registered nurse/nurse manager on duty.



What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

We want all nurse managers to not only be able to use the EHR platform to its full capabilities but also be able to teach it to onboarding newly-hired employees. This will allow for flexibility and more dedicated time when training new staff by not having to rely on one single person.

Our goal is to train nurse managers on the system in the following way:

- All current Nurse Managers will have a training session (as directed by Kendal Corporation) on the new EHR Platform. During these sessions Nurse Managers will have the opportunity to ask questions.
- Use the EHR system to its full potential, with the nurse managers as a team, auditing and providing feedback to each other to get on the same page. To meet on a weekly basis for the first 8 weeks. Will then have monthly meetings/touch base. This will be the audit process.

How will you measure the success of these goals?

Measuring the success of this ALP will be ongoing. Auditing will take place in regard to the documentation aspect of the EHR system. Weekly meetings will be held for the first 8 weeks. Then, meetings will transition to monthly.

DON, ADON, Nurse Managers will be checking to see if all the required documentation is being completed:

1. workflow tasks/assessments are being completed for newly admitted residents- this includes adding in immunizations, diagnoses in the EHR
2. care plans initiated medications are being updated.
3. If an RN nurse manager is not using the EHR system as it should be, they will receive counseling per Kendal Policy as they are failing to meet what is set forth in their job description.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

The ALP not only aligns with the organization's needs, as it is essential that the required documentation is completed in its entirety and timely manner due to the regulation aspect, but will also improve staff communication and residential care.

What is your plan to keep your sponsor engaged with your work?

Determine the implementation date as directed by Kendal Corporation and then set up meetings to review progress of EHR implementation and training. This could be as often as once a week until we get everything up and running smoothly.

What is the process you have developed to complete your ALP?

1. **Timeline** - end of the year 2025. This is due to changing the EHR system to a 'newer' version than what we are currently using. This is to transpire at the end of 2025. Then we will follow the plan as outlined above for training purposes.
2. **Details of who you need to include in the process** - need to include Nurse Managers, Director of Nursing, Assistant Director of Nursing.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

The timeline may need to be adjusted depending on whether or not Kendal Corporation changes their timeline of implementation. The timeline is an estimate as a specific date hasn't been set forth regarding the changeover. The timeline that has been presented has just said "by end of year 2025."



Even if you identify none, how will you ensure that the group is testing the process, re-examining goals and re-considering how best to measure success?

We will look at feedback from new and current employees on the system through anonymous surveys (survey monkey), so employees are able to speak truthfully about how the new system is working. We will also gather feedback from new hires through 'we care connect' that Kendal at Oberlin is currently using. We will be looking at the retention of new hires, especially nurse managers.

What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

My DISC score was a high 'S'- stabilizing. Leadership strengths with being an "S" that is beneficial with this ALP include hard working, calm, and collaborative. A weakness of an "S" is not liking conflict. There could be conflict between the Nurse Managers, as the expectations are raised with their use of the EHR system. Even though there will be higher expectations, I hope the nurse managers will recognize the importance of the new system and will come to see that in the end, this new system will make it easier on everyone if used correctly.



Derik Kroeze

Executive Director
Otterbein SeniorLife Granville

Action Learning Project:

Growing Together: An Intergenerational Connection Program

I would like to develop a program that connects the residents of Otterbein Granville with intergenerational events on our campus and throughout the Village of Granville. This program will be arranged as a collaborative agreement between several local organizations, likely including Granville public schools, Denison University, and Otterbein SeniorLife Granville.

Long-term programs could include:

1. Expansion of our Artist-in-Residence Program (currently one Denison student for 10 weeks during the summer)
2. Denison or Granville High School students volunteering to collaborate with our residents for our Opening Minds through Art program.
3. Various shadowing opportunities for students. Example: There is a rising junior at Denison University studying Psychology and Neuroscience who would like to shadow our therapy department this fall.
4. Granville Intermediate School has a "Land Lab" on their school grounds. Otterbein Granville is an accredited level 1 Arboretum, which is an important feature for many of our residents. We would collaborate where students could come to explore our Arboretum, and our residents could visit their "Land Lab" to learn and grow together.
5. Letter Writing Program – "Pen Pals" between students and residents, with a planned get together at different points in the school year.
6. Collaboration with Granville Parent Cooperative Preschool where our residents could volunteer to read to the students, either at the school or at the community.
7. Brainstorm with these different local organizations to determine other programs that would help their students.

What inspired you to choose your ALP?

When I first moved to Granville to work at Otterbein (Kendal at the time), my family of five lived on campus in an Independent Living cottage. My twins were 2 and a half and my youngest was 6 months old. This was early 2021, when so many of our residents felt isolated due to COVID restrictions of the past 9 months. My wife and I would pull the 3 kids in a wagon around the campus, and their mere presence would brighten the days of our residents. Many residents would comment how that is the one thing they missed the most about their home prior to moving in – seeing the kids playing in the neighborhood, observing their youthful exuberance and joy for life. In addition, Otterbein Granville has hosted an Artist in Residence from Denison University over 7 of the last 8 summers. I have witnessed first-hand the incredible benefits of the relationships built between the student and our residents. I thought – how can we expand upon this to help both our residents, local students, and also expose the youth of Granville to future career opportunities in the senior living field? Our residents are so talented, intelligent, and wise. They have so much to share with future generations.



How will this ALP impact your organization and/or greater community or field?

My ALP will increase exposure for youth to discover the field of aging services. In the near future, I would hope this exposure would help with recruitment of CNAs, kitchen staff, grounds, etc. In the long-term, students with this experience could consider careers in nursing, administration, sales & marketing and more within senior living, and base their future education around that goal. For our residents, I would expect the impact would be a greater understanding throughout the Granville/Licking County community of the value of our older population – that they still contribute, still learn and grow, and are still vital. Of even greater importance would be the health and wellness potential of these interactions, which I describe in greater detail below.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

Otterbein SeniorLife's mission is "Inspired by faith, we strive to enrich individual life journeys for all." It does not even mention the residents – it's enriching all of our lives. There are health and wellness benefits to both our residents and the students of Granville with increased intergenerational socialization:

Residents: Improved mental health, cognitive stimulation, increased physical activity, a sense of purpose and belonging, help with technology if needed.

Students: Improved social skills, increased knowledge and understanding, a sense of community and history. For both groups, we would anticipate reduced prejudice as their time spent together would fight generational stereotypes. I would also expect that this program would improve our partner (employee) retention, with the youth of Granville knowing that Otterbein Granville is a great opportunity to find career opportunities or summer employment. If they already have experience with our residents or on our campus through this program, I would hope that would be increased purpose and excitement for them when they apply.

How will you measure the success of these goals?

To measure our success, we would need to collect data via surveys from all participants - residents, students, organization leaders - at the completion of each program. Most of the potential programs that I described in question 1 would be arranged with clear start and end times or run for a certain amount of time. We could also have focus groups before, halfway through, or after to determine if we are meeting the needs and expectations of the residents, students, or organizations. The big questions: 1. Did this program enrich your life? 2. Were you excited to attend weekly to continue building relationships? 3. After meeting these residents/these students, how do you feel differently about their generation? We will also measure our success based on number of precipitants, hoping that the number of residents and students involved over time would grow. Regarding building our future workforce, we could also measure the amount of applications from different areas over time (Denison students, Granville High, etc.)

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

Otterbein Granville would be the pilot program for Otterbein SeniorLife. Based on our experience, Granville would share best practices and a framework for how other Otterbeins would work with their own local youth and communities. If the health and wellness benefits and/or the increase in partner retention/applications prove true then this program could become a future strategic goal for the whole company.

What is your plan to keep your sponsor engaged with your work?

I will update my direct supervisor (AVP of Operations) as part of our biweekly 1:1 meeting. Once we are aligned and are seeing gains, I would ask to make a presentation of our findings at our monthly Operations meeting, where all of the Executive Directors and Directors of Nursing for the SeniorLife communities meet to share best practices.



What is the process you have developed to complete your ALP?

1. Discuss and gain alignment with my direct supervisor (AVP of Operations) so that the time that I spend on this ALP is understood and prioritized.
2. Meet with Otterbein Granville's Leadership Team and managers to organize the champions of this program. Utilize change management techniques learned at the Leadership Academy to explain the importance of the program to our residents and our organization.
3. Meet with various resident groups to set expectations and gain their buy-in. These groups would include our Resident Wellness Committee and our Resident Council.
4. To achieve quick wins and start to show the benefits, I would start by engaging our partners (employees) to see who has children that they would like to see involved in these intergenerational programs/events. For example, our Administrative Assistant has a high school aged son who has already come on campus to collaborate with our residents on their Bluebird nest monitoring program, and hiked through our arboretum with other residents identifying different species of trees and birds. I would gather quotes from the student and our residents about how their time together influenced them, and publicize in our resident monthly newsletter Tower Lines.
5. My wife Jessi will begin working at the Granville Cooperative Preschool in fall 2025. We would collaborate on opportunities for her 3-5 year old students to engage with our residents. Examples include crafts, reading books, residents with certain talents presenting to the students (master potter, woodworking, violinist), or talking about generational similarities and differences.
6. We would identify programs that we already have on our regular schedule to see how student volunteers could join. For example, our Life Enrichment Director could reach out to Granville High School to let them know about our Opening Minds Through Art program, where volunteers come in weekly for 8 straight weeks to create a piece of art with the same Skilled Nursing resident. Currently, our staff are these volunteers, but this is an easy opportunity for us to engage with local students.
7. I would reach out to Denison University to reengage our Collaboration Agreement which is already in place. We would connect about volunteer opportunities, work shadowing opportunities, and how our Amelia Gathering Room and our resident audience could be a Dress Rehearsal opportunity for the various music students of Denison.
8. While I am seeing all of the benefits for Otterbein Granville, when reaching out to Granville public schools or Denison University I would engage them to think of ways that these collaborations would help their students or their organizational goals. The feedback from these meetings, as well as the resident and employee meetings described above, would help identify other programs or events.
9. Once programs and events are identified, we will develop a shared calendar so we can organize and gather residents and student volunteers based on their interest in the different events. At first, I would hope to set up monthly meetings between Otterbein and the outside organizations to organize and gain feedback on how the program is going. Eventually, I hope these meetings would be quarterly.
10. After event or program execution, utilize surveys and focus groups to determine if we are enriching lives and meeting our goals.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it?

Just about all of them! The partners, residents, the schools and other local organizations will all have their own goals, experiences, and feedback that will reshape the project. And that's okay! My focus will need to remain on the health and wellness benefits of building intergenerational connections for residents, local youth, and our overall community. If I can help others see that benefit and make that change, the actual events or projects are secondary. It's all about building relationships and knocking down barriers! I will need to open a line of communication to make sure that everyone is benefiting from this program to ensure it is sustainable and that we are meeting everyone's goals.



What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

My top 5 for StrengthsFinder is Belief, Responsibility, Developer, Positivity, and Strategic. I anticipate these strengths will serve me well as I work to get a whole community on board to improve the lives of our residents and local youth. I will need to utilize my Belief and Positivity to own this project and see it to fruition. My DISC profile showed me as a very high I and high S. My enthusiasm will be consistent and deliberate as I educate residents, partners, and local organizations about the benefits of this ALP.

How will your mentor support your ALP, and how do you plan to stay in communication?

My mentor, Doug Helman, held my current role for 19 years (2005–2024), and his experience is incredibly valuable. He can support my ALP by introducing me to his connections at Denison and sharing examples of intergenerational events that have been successful in our community. Because he is local to Granville and his children went through the school system, he can also help connect me with other local contacts. We plan to stay in communication regularly, as he lives just a quarter mile from me and is always accessible by phone or text. While I have sometimes taken time to figure things out on my own before reaching out, he has consistently been responsive and supportive whenever I connect with him.



Samantha Lourenco

Senior Director of Strategic Clinical Initiatives
Life Enriching Communities

Action Learning Project:

Way of Wellness

The Way of Wellness takes a holistic approach to our residents' support and care. This program will be used to enrich the lives of the residents by identifying areas of opportunity to grow the resident and to guide the community on the residents needs. For example, does a resident want to relax or do they want to be needed. The Way of Wellness looks at 7 dimensions including; Environmental, Intellectual, Occupational, Physical, Emotional, Social, and Spiritual wellness.

What inspired you to choose your ALP?

At LEC we believe that aging well is a top priority therefore, taking a holistic approach to how we support and care for our residents is important. The best way to do that is develop a program that touches on all aspects of wellness and then train our team on how they can support the residents.

How will this ALP impact your organization and/or greater community or field?

If we can develop a program that is sustainable, and we see makes great improvement to the lives of the residents then we can share this program with other senior living communities.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

The goal for our organization is to get the project CEU approved then train our associates on how to use the information learned to continue the process at their community.

How will you measure the success of these goals?

Consider, e.g.: before/after surveys that will test the importance of your project or its potential impact; the availability of data that support the importance of your project; focus groups; etc. We will measure the success by using a tool we have called ICON. Icon is a voluntary portal for residents to use. We will be able to see if the residents felt supported enough to log in and fill out the self assessments which help guide their plan of care. We will see in an increase in participation by counting the number of self assessments that were filled out. Once we see the increase in survey participation, then our goals will be tracked by the scores we receive on our surveys about events and programming.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

We believe it will fit right in with out resident experience and events and programs department. They will be the boots on the ground to ensure the program continues even when change over occurs.



What is your plan to keep your sponsor engaged with your work?

My sponsor and I meet every Monday and this project is on the agenda. She has encouraged me to speak at conferences about it, once it is finished and she will support me through this process.

What could potentially derail your ALP?

I think the communities could derail the project if I don't get 100% buy in. By starting with the Executive Directors, I plan to have them help me keep eyes on the progress of the project to ensure if we do start to become derailed they can call me in to help them get back on track.

What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

I think my strengths of woo and arranger are very important when it comes to the success of this project. Getting the buy in of my colleagues and all campuses is not always easy. As long as I can arrange the education and help develop the process, I think they will feel comfortable to move forward with the project and I will be an email or phone call away if needed.

How will your mentor support your ALP, and how do you plan to stay in communication?

My mentor is always a phone call or email away. If I need feedback or just someone to keep me moving, she is the person I look to. How do you plan to maintain communication about your ALP with your mentor? My mentor asks me about the process every month when we meet. I give her updates and she gives me suggestions on how to get others buy in and involved.



Corey Markham

Director of Education & Business Development
LeadingAge Ohio

Action Learning Project:

Death Didn't Keep Me Down

I struggle with whether this is motivational or more like a “Second chance of life” speaking opportunity. The target audience may be limited, but I know there are groups out there dealing with second chance opportunities or have gone through a similar experience as I did, or families that have loved ones that have gone through this and wonder how they can help or support or even understand what someone experiences.

What inspired you to choose your ALP?

In April 2016, I was admitted to the hospital after having a seizure and spiking a temp of 103.7 at my PCP when I was there for a follow up blood draw. After being admitted for overnight observation, the following morning they took me for a MRI and between laying me down and going to start the MRI process, I stopped breathing. They were able to resuscitate me after 37 seconds of no pulse and no heart rate, but they were not able to sustain me with their equipment at that local hospital. What transpired was a 9 day medically induced coma, as I battled ARDS and a bacteria infection that caused me to go into sepsis.

How will this ALP impact your organization and/or greater community or field?

I think the story of what one experiences as a patient in this medically induced coma state, what you are aware of, what you dream about, how those dreams match up to what is taking place in your room, etc... would be beneficial to people who are newly going through the experience, family trying to help with recovery, the long term effects one can experience after being “woken up”.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

My goal is to help others understand what one goes through in this state, what to experience when going through PT and OT, how to mentally support someone who is going through the experience and what long-term effects to someone's psychological status may be. I think a first-person account of someone who has been through this and recovered would be beneficial to mental health counselors as well.

How will you measure the success of these goals?

Consider, e.g.: before/after surveys that will test the importance of your project or its potential impact; the availability of data that support the importance of your project; focus groups; etc.: I don't know how to measure this success, as my goal is to provide insight and overall understanding of what a person may be experiencing.



How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

I actually have three sponsors for this project, as I am incorporating three sponsors who are published authors to help me lay out the foundation of my presentation, assist with the outline and potentially turn this into a published story. I feel like my "gift" is more the world of speaking, but I don't want to dismiss the option of making this a book.

What is your plan to keep your sponsor engaged with your work?

That falls on me to keep them engaged by continuing to use them for assistance and direction on next steps.

What is the process you have developed in order to complete your ALP?

Please include not only a timeline but details of who you need to include in the process. Also, be thorough in your thinking about the steps and the individuals to include in the process, e.g.: Residents? Other team members? Other executives? Leaders from the greater community? First process has been the development of an outline of experiences and timeline of events, revisiting stories and experiences of family members who were there during the time, speaking to friends and staff that visited during the timeframe and things they remember from the time. The next step will be to meet with my sponsors again who will assist me with the proper steps of getting things laid out in the fashion they should be, how much time leading up to the events should be covered and how far past recovery I will cover.

What could potentially derail your ALP?

I think I tend to get long-winded, so the creation of the timeline and outline of how to present information will keep me focused on the main bits of the story and not go down rabbit-holes of nonimportant tales.

What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

While primarily a D, C is my second strongest category and I think that will help me immensely once I hit my level of comfort in presenting my final product.



Ben Mounts

Assistant General Counsel
National Church Residences

Action Learning Project:

AI: Seniors Too

Develop a philosophy and governance framework for the evaluation, use, and compliance auditing of artificial intelligence tools, including a playbook for AI tool due diligence and contracting.

What inspired you to choose your ALP?

Where I sit in relationship in a strategic corporate role in relation to direct resident/patient care, and the need to develop norms for responsible use of AI that maintains and advances our mission of providing high quality care and services for seniors.

How will this ALP impact your organization and/or greater community or field?

See above. Also, the two big motivators are quantitative (impacting more seniors) and qualitative (greater impact per senior).

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

This project is one piece of the puzzle of our organization's goal of serving 100,000 seniors by 2030.

How will you measure the success of these goals?

1. Project completion; and
2. Post-project survey regarding utility of AI Policy, Governance, and Playbook.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

Fully aligned, though understanding there will be some internal conversations to have regarding level/appropriate governance.

What is your plan to keep your sponsor engaged with your work?

Regular communication/planning during 1:1 meetings, including solicitation for guidance on framing and direction for alignment at the senior leadership team level.



What is the process you have developed in order to complete your ALP?

Project End Goal – FY June 30, 2027

- **Phase 1 – June 30, 2025-June 30, 2026**
 - Align on AI Philosophy (Done).
 - Roll out AI Use Policy.
 - Align on AI Trust & Innovation Governance Committee.
 - Roll out AI Use/Governance Policy.
- **Phase 2 – June 30, 2026-June 30, 2027**
 - Operationalize AI Trust & Innovation Committee.
 - Develop Playbook for AI Due Diligence and Contracting.
 - Develop roles, responsibilities, and metrics for the evaluation of AI tools, including purchase and ongoing use of such tools.
- Evaluations will center around a three-legged compliance stool: (1) safety - low risk of harm; (2) trustworthy - effective; (3) reliable - low error rate.

What could potentially derail your ALP?

Phase 1 alignment with the senior leadership team on AI governance norms.

What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

Influence – This project will require support from my mentor (Julie Woolley, General Counsel, our organization's Senior Leadership Team, and stakeholders/champions from a multi-disciplinary group (IT, HR, Strategy, Ops (Affordable Housing, Asset Management, Development, Home Health, Private Duty Nursing, Hospice, Primary Care, Therapy, Accounting/Finance, and Senior Living)).



Kyle Schmidlapp

Executive Director
National Church Residences

Action Learning Project:

Meet & Thrive: Resident Onboarding Experience

The purpose of this Action Learning Project is to design and implement a comprehensive resident orientation experience for new residents and their families during their first 30 days in the community. The orientation will include structured departmental visits—with each department head (e.g., nursing, life enrichment, dietary, maintenance, administration) meeting personally with the new resident. In addition, the Resident Welcoming Committee will play a vital role in building peer connections and creating a sense of belonging.

This approach also includes scheduled touchpoints with family members or resident representatives, such as phone calls, virtual check-ins, or in-person meetings, to ensure transparency and collaboration in the transition process. The ultimate goal is to create a warm, well-informed, and supportive environment from day one.

What inspired you to choose your ALP?

What inspired me to choose this project was directly observing the uncertainty and isolation some residents and their families experience during the first few weeks after moving in. Transitioning into a new community is a major life event—especially for seniors—and without a clear, supportive structure in place, it can feel overwhelming and confusing.

By witnessing how small acts of intentional support—like personal introductions, timely communication, and warm welcomes—can make a big difference, I saw an opportunity to formalize those experiences into a consistent, sustainable onboarding process that reflects our organization's values of compassion, inclusion, and excellence.

How will this ALP impact your organization and/or greater community or field?

This ALP has the potential to positively impact both our organization and the broader field of senior living by setting a new standard for welcoming practices. For our organization, it will:

- Improve resident satisfaction by easing the transition period and helping residents feel more comfortable and engaged.
- Strengthen family trust through proactive communication and involvement.
- Foster interdisciplinary collaboration as departments coordinate visits and information-sharing.
- Reduce early move-outs or dissatisfaction, ultimately supporting occupancy and retention goals.



What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

The main goals of this ALP include:

1. Enhancing the resident and family experience during the first 30 days of move-in.
2. Building stronger relationships between residents, staff, and fellow community members.
3. Standardizing the onboarding process to ensure consistency and clarity across departments.
4. Encouraging active engagement from both residents and families from the beginning.
5. Promoting staff accountability and ownership of the onboarding process.
6. Creating a replicable and scalable process that can be adopted by other communities across National Church Residences.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

Success will be measured using a combination of quantitative and qualitative methods, including:

- Pre- and post-orientation surveys for residents and families to assess satisfaction, clarity of information, and emotional comfort.
- Staff feedback on the ease and effectiveness of the orientation process.
- Tracking key metrics such as:
 - Resident satisfaction scores
 - Number of early move-outs or complaints within the first 90 days
 - Family engagement levels (e.g., call/meeting participation rates)
 - Observational data, such as resident participation in activities and engagement with community members.
- Follow-up interviews or focus groups with residents, families, and staff to gather deeper insights.

These metrics will help us understand what's working, what needs improvement, and how to continually refine the onboarding experience.

What is your plan to keep your sponsor engaged with your work?

My sponsor and I envision the ALP (Action Learning Project) aligning closely with the organization's mission and strategic priorities, as well as National Church Residences Core Values: Purposeful Service, Compassion, Equity and Inclusion, Excellence, and Servant Leadership. The 30-day orientation process for residents and their families is designed to embody these values while enhancing the resident experience.

Purposeful Service – We make it better.

We are committed to continually improving our services by challenging the status quo, embracing change, and encouraging innovation.

- The implementation of a structured resident orientation program will significantly enhance the resident experience, particularly during the critical first 30 days. By providing timely information, consistent support, and a warm welcome, this project directly contributes to better outcomes for residents.

Compassion – We foster a caring community of dignity and belonging.

- The orientation process will ensure that new residents and their families feel genuinely welcomed, supported, and valued. Through compassionate interactions and thoughtful engagement, we will promote a true sense of belonging and dignity from the very beginning.

Equity and Inclusion – We make new connections.

We take a genuine interest in people who are different from us and work daily to build lasting relationships.

- This ALP project is designed to create meaningful connections with new residents and their families by acknowledging and honoring their diverse backgrounds. Through inclusive practices, we aim to establish a community that embraces everyone.



Excellence – We embrace stewardship.

We manage every resource wisely and play an active role in sustaining our mission for future generations.

- A positive onboarding experience improves resident satisfaction, which can reduce turnover and related costs. By helping residents feel at home, we are also contributing to the long-term sustainability of the community through increased retention and satisfaction.

Servant Leadership – We go the extra mile.

We serve one another by putting others first, going beyond job descriptions, and proactively solving problems.

- This project reflects servant leadership by ensuring that new residents and their families have everything they need to succeed in their new home. We are committed to walking alongside them every step of the way, demonstrating empathy, care, and support.

To maintain consistent engagement with my sponsor, I plan to provide regular updates during our scheduled monthly meetings. These meetings will serve as an opportunity to:

- Share progress updates on the development and implementation of the orientation process.
- Discuss any challenges or barriers encountered and propose solutions collaboratively.
- Review feedback received from residents, families, and staff to inform adjustments.
- Align the project with current organizational goals and adapt as needed to meet evolving priorities.

In addition, I will remain open to ongoing communication between meetings if key developments occur or decisions are needed. My sponsor's insights and support will be instrumental in the project's success, and I will actively seek their guidance to ensure the orientation process is both impactful and aligned with our shared mission.

What is the process you have developed in order to complete your ALP?

The ALP project will follow a structured development and implementation process, broken down into five key phases over a 6-month timeline. Each phase includes specific stakeholders and actions to ensure a thorough, collaborative approach:

Phase 1: Planning & Research (Weeks 1–4)

- Key Activities:
 - Conduct listening sessions with residents, families, and frontline staff to gather insights.
 - Benchmark with other National Church Residences communities for best practices.
 - Review current onboarding practices (if any) and identify gaps.
- Stakeholders Involved:
 - Executive Director
 - Department Heads
 - Current residents and family members
 - Corporate Quality/Operations team

Phase 2: Design & Development (Weeks 5–8)

- Key Activities:
 - Create a standardized 30-day orientation schedule.
 - Design welcome packets and informational materials.
 - Develop communication protocols for staff and families.
 - Define roles for the Resident Welcoming Committee.
- Stakeholders Involved:
 - Department heads (Nursing, Dietary, Maintenance, Activities, etc.)
 - Marketing/Communications team
 - Resident Welcoming Committee



Phase 3: Staff Training & Pilot Preparation (Weeks 9–12)

- Key Activities:
 - Train department heads and frontline staff on expectations and visit timelines.
 - Finalize family communication templates (calls, emails, updates).
 - Prepare a 30-day pilot with identified incoming residents.
- Stakeholders Involved:
 - Training and Development Coordinator
 - All department heads and front-line staff
 - IT or communications support

Phase 4: Pilot Implementation (Weeks 13–16)

- Key Activities:
 - Launch the orientation pilot with a group of 3–5 new residents.
 - Track interactions, department visits, and family communications.
 - Administer surveys before and after orientation.
- Stakeholders Involved:
 - Residents and families in pilot group
 - Department heads
 - Executive Director (for oversight)

Phase 5: Evaluation & Full Rollout (Weeks 17–24)

- Key Activities:
 - Analyze pilot data and feedback.
 - Adjust the process as needed (schedule, materials, training).
 - Launch full program community-wide.
 - Create a sustainability plan for ongoing implementation.
- Stakeholders Involved:
 - Project sponsor
 - All department heads
 - Resident Welcoming Committee

What could potentially derail your ALP?

- **Staff Engagement/Availability:** If department heads or frontline staff are not fully bought into the process—or if they're overwhelmed with other duties—it could lead to inconsistent participation or burnout, affecting the quality of resident interactions.
- **Resident/Family Participation in Feedback:** Without robust input from residents and families, we risk designing a process that doesn't truly meet their needs. Survey response rates may be low without intentional follow-up.
- **Inconsistent Follow-Through During Pilot:** If tracking and data collection during the pilot is not executed well, we won't have the insights needed to refine and improve the process before a full launch.

To mitigate these risks and ensure continuous improvement:

- We will conduct weekly check-ins during the pilot phase to quickly address barriers and gather real-time feedback.
- A dedicated feedback loop will be established, including short surveys and debrief meetings with staff and residents.
- The project team will hold a mid-pilot review meeting to assess progress against goals, refine touchpoints, and adjust the process.
- After the pilot, we'll host a post-mortem evaluation session to examine what worked, what didn't, and how success is measured.
- Metrics will be updated if initial indicators (e.g., satisfaction scores, engagement levels) prove insufficient or need recalibration.



What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

Based on my leadership style and StrengthsFinder profile, I anticipate the following strengths will be tested—and ultimately strengthened—throughout this ALP:

- Responsibility & Accountability:
- Ensuring follow-through across multiple departments and roles will require me to maintain a high level of ownership and hold others accountable while still fostering collaboration.
- Communication (DISC: Influence):
- Clear, persuasive communication will be critical—both to rally support from staff and to explain the vision and benefits to families and residents. I'll need to tailor my message to different audiences and mediums.
- Strategic Thinking:
- Translating the broader vision into an actionable, sustainable plan will require me to stay focused on long-term outcomes while being flexible with day-to-day adjustments.
- Adaptability:
- Unexpected obstacles will arise. My ability to remain calm, reassess, and pivot as needed will be essential for keeping the project on track.



Danelle Stover

Site Administrator
McGregor PACE

Action Learning Project:

Fresh Start: Activities for a New Generation

“Fresh Start: Activities for a New Generation” is all about improving the day center experience at McGregor PACE’s new Rockynol location. The goal is to create activities that are more engaging and better suited for younger participants, especially those under 70. We’ve noticed at other centers that many of our younger members, between ages 55 and 69, don’t come to the day center as often. A big reason is that they don’t feel like they fit in—many say they’re not “old enough” to relate to the older crowd, and the current activities just don’t match their interests. This project is focused on changing that.

What inspired you to choose your ALP?

The Adult Day Health Center (ADHC) is the “heart and soul” of the PACE model of care. When participants attend the ADHC, the care team is able to get to know them better and provide them with more personalized, effective care. We want to make sure the ADHC is a place where all participants feel included and enjoy attending.

How will this ALP impact your organization and/or greater community or field?

This project will have a meaningful impact on our organization by strengthening participant engagement, improving care outcomes, and supporting long-term retention. By designing activities/processes that are better aligned with the interests of the younger population, we will encourage more consistent attendance at the day center. Increased participation allows our care team to build strong relationships with participants and provide more personalized, proactive care.

While this project focuses on the Rockynol center, the hope is that it will serve as a model for all McGregor PACE locations. By testing and refining the activity framework here, we can learn what works and apply those lessons to improve engagement across all centers.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

The goal is to create a consistent, participant-centered approach that meets the needs of different age groups.

How will you measure the success of these goals?

Monitor participation in specific new or updated activities. Maintain logging of attendance. Use simple surveys or informal check-ins to gather feedback on how participants feel about the new activities. Measure how many younger participants start attending more regularly or re-engage after being previously disengaged. Evaluate how easily the new approach can be adapted for other centers. I.e., what worked, what didn’t, and what resources were required.



How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

This project helps us reach three important goals: increased enrollment, increased engagement, decreased disenrollment, and provision of quality care. By offering activities that younger adults enjoy, especially those under 70, we make the Rockynol center a place they want to be. This will help attract new participants who might not come to a typical senior center. When participants have fun and feel connected, they're more likely to attend regularly and stay in the program longer. Happy participants tell their friends and family about the program, which helps us grow naturally. The more often participants come in, the more we can get to know them and provide the right care early, helping them stay healthier longer.

What is your plan to keep your sponsor engaged with your work?

Share a one-page overview early on with plan goals, why it matters, and how it aligns with the organization's mission and priorities. Send a short monthly email with highlights, challenges, adjustments. Frame updates around what leadership cares about: improved outcomes, participant satisfaction, retention, program growth, etc. Invite them to visit the Rockynol location to see new activities in action. Ask for feedback. Highlight that this is a pilot for broader improvement; We can bring this to our other locations if we are successful.

What is the process you have developed in order to complete your ALP?

Talk with department managers (day center manager, activities director) about the plan. Ask questions on current processes. Visit other McGregor PACE day centers aside from Rockynol to see what kinds of activities they offer, especially those popular with younger participants. Check out other adult day health centers in the area to find out what activities younger adults enjoy. Explore local community centers to see what activities they offer for younger seniors and which ones seem to be most popular. Meet with the marketing and intake teams who regularly visit senior living communities and local centers to hear what activities they see participants enjoying. Survey participants aged 55 to 69 at the day center to learn about their favorite activities and outings. Look over participants' initial activity assessments in the EMR to identify their past and current interests. Review the data with the Activity Assistant and suggest ideas for the monthly calendar—aiming to introduce three new activities each month for three months. Create at least one "special event" per month. Change the process to let participants sign up in advance for special event days using a sign-up sheet, and coordinate with Transportation to plan accordingly. Take a fresh look at how outings are scheduled and suggest improvements, like adjusting return times, allowing longer trips for special events such as baseball games, and allowing events later into the afternoon as transportation allows.

What could potentially derail your ALP?

1. Surveying Participants: If younger participants don't give clear answers or do not respond much, it could be hard to know what activities they want. We might need to find other ways to get their ideas.
2. Changing Signup and Outing Plans: If the new signup system or outing schedule is confusing or doesn't work well with transportation and staff, people might stop joining events or get frustrated.
3. Adding New Activities: If the new activities don't interest participants or are hard to run regularly, people might lose interest, which would hurt our goal to keep them coming.

Talking with Other Centers and Teams: If other centers or teams don't share ideas or aren't open to working together, we might miss out on helpful tips and slow down the project. If other departments aren't open to change or don't want to try new ideas, it could slow down or stop the project from moving forward.



What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

1. DISC:

- a. As an "I", I believe I am great at talking with people, sharing ideas, and getting others excited. This project will let me use those skills by working with participants and staff. However, it may be more difficult to focus on details or to keep track of all the small tasks/data. I may need a "D" or a "C" on my team.
- b. I am also an "S". This project may be challenging when having to help people deal with change or try new things, but my calm and patient way may help others feel more comfortable.

2. StrengthsFinder:

- a. Responsibility: I often feel tempted to do everything myself to make sure it is done right. I may need to trust others to contribute, even if their work style differs from mine. I will need to set clear expectations and provide support rather than doing it all.
- b. Learner: I will need to step into an area that I am not an expert in. I will need to lean on the Activities Director, Day Center Manager, Activities Coordinator, and maybe the Center Assistants.
- c. Futuristic: I may have ideas about innovative activities, but may face current constraints such as limited staff, budget, or buy-in. I also must remember that not everyone shares my forward-thinking mindset.
- d. Relator: I will need to engage with a variety of people to do this work, some of whom may be hesitant or resistant to change.



Kristi Valentine

Lead Healthcare Navigator
Otterbein SeniorLife

Action Learning Project:

“VitalPoint” High Observation Units

A specialized care “unit” designed to deliver enhanced nursing support and real-time clinical oversight, enabling early identification and intervention for patients experiencing a decline—helping to prevent avoidable re-hospitalizations. This program also serves as a strategic post-acute solution for hospitals, offering an alternative placement option for patients whose stability may wax and wane due to multiple hospitalizations, prolonged ICU stays etc. Ideally, those identified to benefit from a high observation unit would remain there for 24-72 hours, until stabilized.

What inspired you to choose your ALP?

The skilled nursing sector is constantly evolving, presenting new challenges. As acute care demands grow and patient acuity rises, we must adapt accordingly. Rehospitalization rates directly impact CMS Quality Measures, influencing star ratings, ACO eligibility, and the ability to secure managed care contracts. At the same time, we're seeing a national shift from Medicare to increased Managed Care saturation. To reduce rehospitalization and remain competitive, introducing models that manage acute care needs without hospital oversight will be essential.

How will this ALP impact your organization and/or greater community or field?

This project is designed to be adaptable for skilled nursing facilities across Ohio and potentially nationwide, depending on state regulations. By reducing unnecessary Emergency Department visits, it can help ease strain on the broader healthcare system. Many patients who contribute to hospital overcrowding could instead be stabilized within the skilled nursing setting—if enhanced clinical oversight were available.

What are the goals for your organization and/or greater community or field that you hope to accomplish with your ALP?

This project aims to deliver measurable benefits across four key areas:

Improved Patient Satisfaction

By managing acute onset conditions in-house—through enhanced nursing and physician oversight, as well as daily labs—we can reduce unnecessary transfers. This promotes a more stable and consistent rehabilitation experience for patients.

Increased Revenue and Contract Opportunities

Implementing high observation units to manage acute symptoms can significantly reduce rehospitalization rates. This improves continuity of care and strengthens a facility's position in securing managed care contracts or negotiating rate increases. Additionally, facilities could pursue higher reimbursement rates for patients in these units, given their elevated need for clinical oversight and resources.



Stronger Partnerships with Acute Care Providers

High observation units can be marketed to hospitals and physicians as an added layer of oversight for complex patients. Facilities could offer direct admission into these units for the first 24–72 hours—especially for individuals with; recent multiple hospitalizations, prolonged ICU stays, or expedited discharges—enhancing provider trust and care coordination.

Reduced System-Wide Healthcare Strain

By equipping skilled nursing facilities with the tools to manage higher acuity care, we can help stabilize patients onsite and reduce unnecessary Emergency Department visits, easing pressure on overburdened hospitals.

How will you measure the success of these goals?

Historical Data Review: We will analyze data from past utilization of the High Observation Units to assess the volume and sources of patient identification (internal vs. external referrals). This will help determine the program's reach and engagement across care settings.

Transition Outcomes: A key metric will be the percentage of patients who successfully transition off the High Observation Unit without requiring an emergency room visit or hospitalization.

Rehospitalization Rates: We will conduct quarterly reviews of facility-wide rehospitalization rates, comparing trends before and after implementation of the High Observation Units.

Supplemental Measures: Where appropriate, patient/family/acute care provider feedback and staff satisfaction surveys may be conducted to assess qualitative impact and overall perception of the program.

Together, these metrics will help evaluate both the clinical effectiveness and strategic value of the initiative.

How do you and your sponsor envision your ALP aligning with your organization's needs and priorities?

I have identified two key sponsors for this project:

Internal Sponsor: Emily Simpson, Vice President of Clinical Outcomes at Otterbein. Emily believes this approach has the potential to significantly benefit multiple Otterbein locations, supporting our ongoing efforts to improve clinical outcomes and strengthen our position as a leading provider of post-acute care.

External Sponsor: Tammy Selvey, Chief Clinical Officer in the for-profit sector. I am collaborating with Tammy to ensure the model is adaptable across different organizations with minimal modifications. She views this approach as essential to the future of skilled nursing, especially as patient acuity continues to increase.

What is your plan to keep your sponsor engaged with your work?

My goal is to set aside time once a month to meet about the development of the project, then more often after Leadership Academy is completed to ensure momentum isn't lost in getting the project trialed at a location of our choosing.

What is the process you have developed in order to complete your ALP?

January 2025: Talking with mentor to decide on ALP

February 2025: Decide on which sponsor within Otterbein and externally I'd like to approach. Reach out to gauge their interest and secure their support/engagement.

March 2025: Begin writing outline of policy/procedure and work with sponsor to decide on locations that could be realistic options for "roll-out".

April – May 2025: Connect with external sponsor to review process and determine if it would be easily transferable to for-profit companies. Connect with internal sponsor to review which areas would be considered "hurdles" to overcome prior to attempting a "roll-out", to ensure initial success.

June 2025: Complete High Observation Policy and High Observation Program Overview, submit to both sponsors for review and input/revision.

July 2025 and beyond: Work with internal sponsor to develop a task force to develop a work-flow to ensure all aspects of care are considered and represented: clinical, operations, billing, marketing etc.



What could potentially derail your ALP?

Two key areas have the potential to reshape or significantly impact the trajectory of the project: operational hurdles and the task force review.

1. Operational Hurdles: Otterbein operates multiple locations, each with varying clinical capabilities and resource availability. Certain requirements for a High Observation Unit—such as the ability to conduct daily labs or ensure consistent oversight by a physician or physician extender—may present logistical or staffing challenges that could delay or limit implementation at some location.
2. Task Force Insights: The task force may raise considerations that could reshape the project's scope or structure, particularly around areas such as risk management, regulatory compliance, or billing and reimbursement strategies. These perspectives, while valuable, may also present barriers that could require substantial adjustments to the original plan.

By anticipating these potential influences early, we can remain flexible and responsive in adapting the model to ensure long-term success.

What areas of your leadership strengths (DISC/Strengths Finder) do you anticipate will be tested during the ALP?

On the DISC assessment, I score highest in D (Dominance), closely followed by I (Influence), with my lowest scores in S (Steadiness) and C (Conscientiousness). This means I am highly motivated by innovation, efficiency, and the opportunity to create and implement new systems. However, I can become negatively impacted by excessive meetings and disorganization—two common challenges that often arise in the early stages of launching new initiatives.

One blind spot identified through my DISC results is a tendency to move forward without seeking enough input from others. For this project to be truly effective and sustainable, I recognize the importance of engaging other's perspectives early and often. Being aware of these potential pitfalls allows me to manage my own expectations and develop strategies to navigate initial disorganization, while ensuring that collaboration remains a focus for the process. This self-awareness will be key to ensuring the success of the project.

How would you like your mentor to support you in your ALP?

I envision my mentor as more of a sounding board for this process. Someone I can bounce ideas off of and brainstorm with throughout the process. I have also asked her to point out 'blind spots' and be a devil's advocate when I come to her with ideas to help me think outside of the box and anticipate any criticism or questions that may arise.

How do you plan to maintain communication about your ALP with your mentor?

We have an open communication style, as we both work for the same company. I speak with her several times a week via phone, email or Zoom. My goal is to maintain communication about the progress of the ALP at least once a month, more often if I need her advice related to the project.



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