

LeadingAge™
Ohio

leadership academy

2015 Action Learning Projects



Partners:





Rachel Abshear

Organization: formerly with Otterbein Lebanon Senior Lifestyle Community

Title: Director of Independent Living

Name of ALP: Develop a Long-Term Strategic Plan for Re-visioning the Beauty Shop

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

In late May Otterbein experienced a fire in our laundry department that, because of the smoke and water, damaged other connected areas as well. One of the areas affected was our Beauty Shop. The Beauty Shop had moved to this location in the last two years, so the space was a beautiful, redesigned salon that residents truly enjoyed. During transition planning for the Beauty Shop and other impacted amenities, I was given the role of supervising the Beauty Shop and supporting and guiding the temporary and long-term planning for relocation and redesign. Although there are many areas of responsibility I could choose for my ALP, I selected the Beauty Shop Re-visioning because it is an opportunity for me to lead a new group of staff and to offer a positive outcome to our residents despite a significant challenge. Completing this ALP will impact my organization by identifying the best temporary and long-term locations and design for the salon, which is vital to our resident satisfaction.

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

My goals for this ALP are to: develop a communication plan for residents that they can maintain trust throughout the transition as well as in the future; identify the best temporary location(s) for the Beauty Shop so residents don't miss services during the transition; provide support to the Beauty Shop Manager to address concerns, issues, and ideas throughout the re-visioning process and to assist her in managing a stronger team and salon in the future; work with the redesign team to ensure the new Beauty Shop has the needed space for all the amenities offered as well as opportunities for growth; identify a timeline for the re-vision Beauty Shop (target dates for communication pieces, staff meetings, furniture and supply acquisition, physical move, celebration event), and identify two additional services to offer with the new Beauty Shop and ways to implement them into our salon (i.e. networking with local beauty schools to offer facials, offering certain services as "traveling services," etc.)

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

My sponsor will be our Executive Director. We have had conversations about this project and the goals involved. I plan to follow up with him through weekly meetings and design team meetings.

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

Since identifying this ALP and developing the goals, I have worked with the salon manager to ensure an accurate schedule of which stylists will be at which temporary locations (we are utilizing three temporary satellite salons on campus), initiated a communication piece telling residents updates and schedules, and participated in design team meetings about the future vision and location of the Beauty Shop. My next steps are to continue sending out the resident communication on a monthly basis; to coordinate a meeting between the Beauty Shop Manager, Environmental Services Director (who is leading the construction process), and me to determine furniture and supplies for our temporary long-term location; and to develop stronger relationships with the Beauty Shop stylists to assist them during this transition and to help them anticipate new opportunities with the permanent long-term salon.

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

So far I am learning that I am strong with communications both to residents and to direct reports. The re-visioning process requires clear information in order to maintain trust and minimize frustration. I am also learning to be more flexible as a leader as the Beauty Shop Manager's schedule is challenging (very hands-on) so meetings are hard to commit to even though necessary right now. Leadership Academy has been helpful in stressing various styles which is helpful during a transition like this that involves many different people from different backgrounds.



Judy M. Augsburger

Organization: Mennonite Home Communities of Ohio (MHCO)

Title: Director of Finance

Name of ALP: Finance Department Cross-Training

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

In 2012, we purchased a neighboring facility and I was tasked with creating a Finance Department that would serve the entire organization. I now have a payroll specialist and a billing specialist in two different locations, using different software. While being mindful of internal controls and separation of duties, I had, in the past, been very careful to keep the positions totally separated. As we embarked on our leadership journey earlier this year, my goal was to find a way to further pull together the Finance Department into one cohesive unit. While we ultimately get the work done, I hadn't felt that we were truly working together, and then it dawned on me that it was my actions that were creating the rift. Cross-training might actually be the answer. I was first inspired by how well the Medicare Triple Check meetings had been going and how the various departments were working together as a team to ensure the billing was thoroughly reviewed prior to issuance. They were sharing information, working together, and curious about what the others were doing. They even would visit each other's work area to actually look at the computer monitor to see what the others saw so that they could work through the various issues. It was a learning process. Initially, the whole Triple Check idea went over like a lead balloon and so it was fun to see it evolve, but it was through the Leadership Academy's training that I received the knowledge, and the tools, that I needed. As we work through the details of cross-training, the MHCO Finance Department will eventually be a well-trained service team with an "I can do that" attitude.

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

My goals are to cross-train the team members within the Finance Department so that we are able to help each other out when needed but also to provide back up for vacations, illnesses, etc. I would also like to find one payroll software system that can be used by both facilities. This would make the cross-training for payroll simpler as well as ensure that we are getting what we need as far as reports and accuracy. I believe these actions will create more communication and better teamwork among the team.

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

My sponsor will be Laura Voth, CEO, Mennonite Home Communities of Ohio. She is very supportive of the Leadership Academy and I am very thankful to have been given this opportunity. Laura and I have discussed the project as well as the impact on the organization. I believe she will be a good sponsor since she has been CEO for quite some time, and with the organization in one capacity or another for more than 30 years. Laura asks questions that make me think and she has great follow up. We communicate on a daily basis.

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

In order to accomplish the goals of my ALP, I will have both payroll specialists learn how to print the billing invoices. If a resident, or a resident's family, needs assistance while the billing specialist is away from their desk, the payroll specialist can help. I am also going to have the billing specialist in one location cross-train on payroll. She has been responsible for payroll for a previous employer so I believe that she may be able to bring new ideas to the table. As far as the new payroll software is concerned, I will begin the cost analysis of the various software proposals that we've already received. One further step, overall, that I now feel is critical, is a review of the materials that I've received from the Leadership Academy. I have learned so much and look forward to making sure that I am using the knowledge that I have gained.



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

So far, I am amazed at how easy it is to see the bigger picture as I'm typically a focused task-oriented person. I'm more aware of what's going on around me and I definitely ask more questions. I've learned that not all of my own actions inspire trust, no matter how well-meaning I think I am. I have also learned that we each have our own leadership style, and that it's ok to be different. Leadership is very different than management, and communication and follow-up are key factors to the success of the organization. I have enjoyed learning about different personalities and how we can work together as a team, and how each personality brings something useful, and necessary, to the table. That information has been very helpful as I truly appreciate each team member's unique personality and abilities. I have learned about my own leadership style and how to build trust within the team. I feel that I am not only a better leader, but a better person, and for that, I'm very, very grateful.



Cindy Bell

Organization: Star Home Health Services

Title: Executive Director

Name of ALP: New Hire Mentoring for Nurses and Aides

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

What inspired me to choose this project was to improve our quality and outcomes for our clients. This project allows me to have feedback from staff on how the training is impacting them as individuals and having the ability to be successful in their roles within the organization.

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

The main goal is to improve our quality of care and have all the individuals who enter into our organization have the ability to be successful in their roles within the organization. This will allow the expectations of each individual to be clearly defined to ensure they have the tools to be successful in our organization. To allow the individual to feel comfortable expressing to others if they do not understand or need further training in order to have the confidence to be successful in their roles.

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

Elaine Johnson, RN will be my sponsor. I have had a conversation with this individual, and I plan to follow up and communicate with this individual weekly to ensure she is aware of the path I am on for this program. This individual will be able to provide feedback on this project and help me to make adjustments as the project moves forward.

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

The next step to accomplish this project is to put it into action. The individuals whom enter into our organization will follow the specific checklist to ensure they are trained on the ideas of the organization that were designed by our staff. Then there will be a follow up with the individual whom received the mentoring to see how effective they felt the training they received was to help them be successful in their role within our organization. The feedback from the individual will be discussed in our team meetings, and as a team will make changes to the checklist as we see necessary to remain up to date with our training.

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

Some discoveries I have made about myself as a leader during this process is that perception is an intricate part of our job. The perception that individuals have is crucial to the success of any project that requires buy in from staff. Another discovery is that not everyone learns in the same way and we have to have the flexibility to switch the learning up to meet the needs of the individuals who are going through the mentorship program. Finally, I learned what an awesome group of individuals I am working with every day and how even when the boat is slow there is no one drilling holes which is amazing; we are all working to make this project successful to make everyone's job a little easier. The individuals want to see the new individuals become successful in their roles within the organization. The main idea that learning is life long and when we take on new projects we have to be open to new ideas, and the challenges that come with the implementation of the ideas.



Kristen Collins

Organization: Westminster-Thurber Community & Senior Independence - Columbus

Title: Director of Human Resources

Name of ALP: Interviewing for Emotional Intelligence

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

The inspiration for my project grew out of the dedicated focus of my community in creating a caring culture where everyone feels welcome, valued, a sense of belonging, and successful. In developing this culture, our Leadership Team has delved into self-assessment, personal development, and leadership growth. We have used Everything DiSC assessments, Personal Listening profiles, and resources for understanding Emotional Intelligence as core elements for creating our culture. Because a culture is created by the people who work there, I wanted to develop strategies beginning with our hiring process to find people who are best suited for demonstrating the principles of our culture.

We have focused consistently on behavioral interview questions during our interviewing process because we know that they provide us with information that serves as better predictors of future behavior. After reading the books assigned during the Leadership Academy, I knew I needed to focus on my continued learning about Emotional Intelligence and utilize it with my Leadership Team to enhance the work we do every day.

I decided to interview the leaders in our nursing department to better understand the characteristics of successful employees. I assembled interview questions specific to the department that would enable them to dig more deeply during each interview and improve our possibilities of finding candidates who are the right fit culturally with our community.

This added depth in the interview process has the possibility of dramatically:

- Increasing our success hiring the “right” people for our community.
- Increasing our new employees’ satisfaction because they fit our culture.
- Increasing the engagement of those new employees as they begin and continue their career with our community.

The resulting outcome of engaged, happy employees is increased retention and better quality of care and treatment for the people whom we serve.

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

I hope to: engage the Leadership Team more deeply in the interviewing process by having them provide more details regarding the desired characteristics we are seeking in our candidates; provide my Leadership Team with the tools to determine more accurately which candidates are the right cultural fit, and teach this process to enable the Leadership Team to enhance our interview questions.

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

Leslie Belfance, WT Executive Director, is my sponsor. She worked with my mentor to help me pare down my original ideas into a realistically manageable project. We communicate regularly regarding updates about the process and what would be useful for the end users – our leaders.



leadership academy 2015 Action Learning Projects



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

Nancy Pettigrew from The Healthy Workplace, LTD is the consultant with whom our community has worked since I joined Westminster-Thurber. We have a strong working relationship and she knows me well. Because of this, she has agreed to be my mentor. Nancy and I meet on an as-needed basis and I will continue to utilize her to help me keep the end result in focus and the scope of the project manageable.

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

I will begin with the nursing department and determine the key characteristics the leaders are seeking in future employees, based on the most successful employees in their department. Once the characteristics have been identified, I will refer to The EQ Interview: Finding Employees with High Emotional Intelligence by Adele B. Lynn to determine the best questions to use during the interview. I will follow up with the members of the department's Leadership Team to determine what worked and did not work for them during the interviews. When these steps are completed, I will work with another department to begin the process with them.

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

As a result of one of our hands-on Academy exercises, I realized I often find myself "on the dance floor" assisting with the completion of tasks versus being "in the balcony" watching the choreography of the dance unfold. While it is an important part of my role to provide hands-on assistance when it benefits the leaders, it is even more valuable for me to work with my leaders to help them develop themselves into stronger leaders. After experiencing tremendous success with our first department of leaders during our recent hiring event, I found that their enthusiasm and appreciation of the new interview questions was contagious, making me very excited to begin this journey with the remaining departments at my locations. I saw the leaders' eyes light up at the success they felt during this round of interviews, with our Emotional Intelligence-based questions. Leaders were able to see inside candidates more quickly and determine who would best fit into our community's culture. They were also able to remove from consideration the candidates who had strong operational answers, but no understanding about relationship development with others. Having a clear understanding of relationship development is key to the success of our employees and our working teams in our culture. This process, to date, has illustrated for me that other leaders appreciate my perspective and greatest areas of strength. They also feel comfortable sharing their opinions about improving the set of interview questions, to make them as effective as possible. Gathering the leaders' feedback at the beginning and listening to their follow-up feedback at the end has been invaluable. I will continue this process with the leaders of all of our departments. The end result will likely be very exciting as it promotes greater success for our employees and our community!



Kathleen Geers

Organization: Otterbein Lebanon Senior Lifestyle Community

Title: Director of Marketing & Communications

Name of ALP: Uniting the Sales and Marketing Force cross All Ministries

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

My inspiration came from discussions with our Vice President of Marketing & Communications as well as other members from the Executive Leadership Team at Otterbein regarding the fact that we had multiple marketing employees calling on the same referral sources....one for Otterbein Lebanon Senior Lifestyle Community, one for Otterbein Home Health, one for Otterbein Hospice and two representing our various small house neighborhoods. We seemed to at times to be competing with each other for the same referral. We also considered how confusing this might be for our referral sources. It was possible that one marketing person could visit a referral source and an hour later they could be called on by another Otterbein marketing person. We hope the impact for the organization will be to streamline the process of referral marketing across all ministries so that we become one unified Otterbein offering multiple locations and services.

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

To build post-acute census across all ministries by better serving our referral sources and ultimately the seniors we care for.

Who will be your sponsor?

The sponsor will be our corporate VP of Marketing & Communications.

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

The initial step was to conduct research to learn how each member of the marketing team felt about their role and also how the referral sources thought about the service Otterbein was providing. Once the research was complete, we met as a team to discuss the findings and began to build strategy around uniting the team to appear as One Otterbein to the referral sources and the community at large. A team building event was conducted by our VP of Human Resources for all of the marketing employees to better get to know each other and discuss ways to begin to work as a unified team instead of in silos. After this event, it was good to see email conversations of marketing team members from one ministry inviting others to an event they were sponsoring or to a difficult appointment that they had finally secured with a referral source. A second step in achieving this goal was the purchase of a CRM system for all ministries to use that were taking post-acute referrals. The system went live July 1, 2015 and now all marketing people can see when a referral source has been visited and what the outcome of that visit was. The third step was to develop a unified piece of collateral that showed the referral sources as well the prospective patient and their families all of the options that Otterbein offers... outcomes better than state and national averages, low readmission rates, and great quality care offered at multiple locations in southwest Ohio or even in your home! Finally, a team lead needed to be hired to drive this initiative, not just in southwest Ohio, but across all Otterbein ministries throughout Ohio. An Assistant Vice President of Post-Acute Marketing has been posted and the interviewing has begun.

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

I have learned many things about myself as a leader throughout the process of The Leadership Academy. I enjoyed the reading assignments, discussion with peers, time to reflect and journal, guest speakers and panels and especially the Leaders in Residence. The coaches did a great job of guiding us through this introspective process. A few of the major things I learned about myself as a leader were first, that I needed to work on not showing my emotions so easily. One Leader in Residence said to me "People are always watching." That is something I won't easily forget. I am very passionate about life and sometimes let my emotions flow a little too freely. Paying more attention to my emotions and their impact is something I have definitely been working on this year. I'm doing a better job of recognizing the emotion, and then collecting facts and considering options before reacting. I also need to do a better job of making time to network, both inside and outside of our industry. And probably most important, I have been challenged once again to do a better job at finding balance! I liked the accountability of our team always asking each other what kind of progress we were making on whatever we were working on for that session. It was also good to revisit my strengths as a leader. Being an "Innovative Pioneer" are pretty good strengths in a marketing leadership role! So many times, we focus on the weaknesses and what needs improvement and that's important, but it was also good to celebrate our strengths and successes together.



Valerie Hoadley

Organization: Cedar Village

Title: Controller

Name of ALP: The Engagement of Cedar Village in Enhanced Labor Management and Its Value.

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

Employee labor is the largest expense by far each year in our organization. I hope those who manage labor will be inspired to design a process where we can manage and categorize employee labor consistently across the organization. The consistency of information and reliability of reports will enhance communication both within the organization and to those we are required to report labor to outside the organization. Management should find the new process easy to embrace as it should provide labor management tools that save time and money, as well as being more efficient.

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

To ensure the data being collected in multiple systems across the organization is accurate and consistent. To code new hire information and employee changes correctly the first time in all systems (HR, Payroll, Time on Demand, On-Shift) eliminating the need for payroll adjustments and manual checks. To streamline the process of how employee information is collected and entered, including if necessary what forms are used to gather this information. This will eliminate administrative man hours created by the need for duplicate entry. To be able to better track employees who float from one department to another.

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

Jan Wooles, CFO at Cedar Village, will be my sponsor. I have reviewed my goals with her. She agrees there is a need to enhance employee and labor tracking. I plan to meet with her twice a month to discuss my progress as well as e-mailing updates when appropriate.

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

My mentors are Linton Sharpnack, COO and Kristy Bernhardt, MDS Manager. Both of these individuals have a wealth of knowledge when it comes to data analytics and the impact that data has in decision making both within and outside an organization. These individuals are both located at Cedar Village so communication should not be an issue. I intend to formally follow up with them bi-weekly with a face to face meeting.

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

To organize a cross-departmental team, ensuring the needs of all departments diverse views are met in gathering the data. Decide what data to gather for each system and to eliminate data entry redundancy between the systems. To map the current flow of information, identifying gaps and data overlaps between systems. Document the new process for consistency. Produce reports required for internal and external customers in regards to employee cost center information.

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

I am gaining the most information when I am actively listening. If I am able to follow up with a soft ball question, the conversation becomes most enlightening. If I push myself out of my comfort zone and network with people, new ideas present themselves. Follow up needs to be in a short window or the idea gets lost. It's ok not to know all the answers, but to listen and follow up with a solution or suggestion. I need to believe in myself and constructively stand up for what I believe in. Asking for constructive feedback is a great way to grow. I am learning to see another perspective and make sure others are heard or valuable information is lost.



Ari Hyman

Organization: The Montefiore Home

Title: Operations Manager

Name of ALP: Initial Plan of Care Satisfaction Survey

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

Our organization has developed a reputation in the community as being one of the premier skilled nursing facilities in Northeast Ohio and has established partnerships with the largest hospital systems in our region. More than one-thousand patients per year choose The Montefiore Home as their facility of choice to receive skilled nursing services. Maintaining and growing our historic volume of patients requires us to create a superior patient experience that leaves current patients and hospitals satisfied with the services we provide and willing to recommend our facility. My inspiration for this project was to develop a tool to proactively improve patient satisfaction by asking patients about their experience at our facility early on in their stay.

This tool will make an impact on our organization by helping us to build upon our past success of creating an amazing patient experience and delivering strong clinical outcomes. The survey is designed to gain feedback from and recognize the individual and collective needs of our patients. For the past few years we have had a process in place to survey sub-acute patients about their experiences in our facility immediately prior to their scheduled discharge. While the data is valuable, helps us to trend our performance, and benchmark against other facilities, the survey happens too late in the patients' stay at our facility for us to make meaningful changes in the event that they feel there are areas for improvement at our facility. We want to be able to react quickly to the feedback that our patients deliver to us through this tool.

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

Data tells a powerful story and helps to identify trends. For challenges that are identified as "widespread", we are able implement interventions that positively impact all patients. Frequently the responses to survey questions are patient specific; by identifying concerns on an individual basis and designing a specific intervention for them, we improve their patient experience, and over time, our quantitative data and overall patient experience will improve.

The goal of this project is to qualitatively improve our patient experience. If patients have concerns with the services provided in any of our domains, we want to address that concern immediately rather than let a concern linger throughout the patient's stay. Our Director of Nursing for the unit reviews the surveys daily and works with her team to address each of the concerns.

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

My sponsor for this project is the Montefiore Patient Experience Team. The Experience Team is chartered "to improve the Montefiore Experience for our employees, residents, families, and patients by systematically planning key initiatives, tracking metrics to inform decision making, and executing on improvement ideas." Our team meets bi-weekly, giving us a regularly scheduled opportunity to review data from the surveys, measure progress towards our goals, and continuously refine and improve the survey and process.



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

The steps to design the survey and execute its implementation have been and will be:

1. Discuss with the Experience Team what domains we want to assess and identify specific data points to create survey questions.
2. Take feedback from the team on domains and data points and draft a survey with sample questions for the team to review.
3. Present the survey draft to the Experience Team for review of both style and content of the questions.
4. Keeping in mind that we don't want our survey to be too long and burdensome for our staff to administer and for our patients/families to take, the team decided what questions were essential and needed to remain and what questions should be left out of the survey.
5. The team decided that the best time to survey residents was at the initial plan of care meeting which takes place within seventy-two hours of admission.
6. Our Social Service team administers the survey.
7. Clinical management reviews every survey and implements individual interventions as necessary for each patient.
8. Review data trends over time and compare to pre-discharge surveys to measure success and identify areas where we need to improve service.

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

My natural tendency to any problem is to research it, to get answers to unanswered questions, and to develop an action plan to solve it. I have learned that as a leader I need to step away from my initial inclination to solve a problem. The key to success for me often lies not in the answers that I provide, but in the questions that I ask. A large part of leadership is about engaging those around you to define a collective vision or purpose, and fostering collaboration amongst your team to meet that objective. Open-ended questions not only help to define vision and purpose, they spark creativity and can push those around you to think differently about problems, develop confidence in their expertise, and serve as an inspiration to innovate.



Terry Kovach

Organization: Kendal at Oberlin

Title: Assistant Marketing Director

Name of ALP: Guidelines and Best Practices for Use of Social Media in Marketing

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

Social media has become an important marketing tool for Kendal at Oberlin and other Kendal affiliates. As use has grown, there are increasing requests for uniform guidance in the way of best practices, compliance (HIPAA, FHA and ADA), reputation management and engagement of staff. I am a member of the corporate IT Steering Committee, which identified a need. And a recent experience with our own Facebook page highlighted the need for better understanding of compliance issues, as well as best practices that fit with the guidelines of The Kendal Corporation's Values & Practices.

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

My goal is to create a document and training session outlining specific guidelines for social media use that will help Kendal marketing staff system-wide. Compliance with HIPAA, Fair Housing and ADA are concerns to address, as are suggestions to engage staff to help create a positive image of Kendal on our social media sites. Guidelines for reputation management will be addressed as well. This piece should help define practices for success with organic use of social media, as opposed to paid marketing (advertising) on these channels. Finally, as Kendal at Oberlin was one of the early Kendal affiliates to use social media for marketing, identifying "best practices" to help other affiliates develop effective programs will be included.

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

My sponsor will be Larry Elveru, Associate Director for Communications & PR for The Kendal Corporation. Larry and I have discussed this project, and he agrees that there is a need for guidelines in this area. We have discussed possible resources that may be available at the corporate level for this project, and I will continue to communicate with him on my progress. Given the geographic distance, most likely communications will be by phone and by email.

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

My mentor will be Patty Cisco of Marketing Essentials. I have spoken to her about this and she has agreed to work with me on this project. I am confident that Patty will offer honest and open feedback about this project as I move forward, with an emphasis on maximizing the marketing benefit of engaging with social media channels. Patty is Kendal at Oberlin's partner for internet marketing, which includes regular use of social media. She has also had extensive experience working with aging services organizations. Patty and I meet regularly to discuss our marketing effort for Kendal at Oberlin. I can also reach her as needed by phone or email.

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

Having reached out to resources, the next step would be to create an outline of the key components for this document and training. My proposed resources to assist with making sure this piece is accurate and helpful include:

- Compliance (HIPAA, ADA, Fair Housing) – Stacy Terrell, Kendal at Oberlin
- Human Resources – Audrey Super, my colleague on The Kendal Corporation's IT Steering Committee
- Reputation Management – Patty Cisco, Larry Elveru

From the outline, I would research each area, with guidance from my resources named above. Once information is assembled, I would look to develop an educational presentation to share this information with my colleagues who may have an interest in it, and a corresponding reference document that can be an ongoing resource. Patty Cisco has expressed interest in presenting this with me on a wider scale, perhaps submitting as a proposed topic for presentation at a future LeadingAge Ohio gathering. As social media, SEO and internet best practices tend to change fairly quickly, the document will likely require periodic updating.



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

I am learning how helpful it is to reach out to others when approaching a larger project. Appreciative inquiry has been especially helpful in this process as I've talked to potential mentors and discovered new ideas that will make this project more relevant to potential users when it is complete. I am learning more about team development and the value that other team members can bring to the project. I believe this project will offer an opportunity to present new ideas that may be different from earlier policies, but given that social media continues to evolve as an important communications tool, and not just "entertainment," this should be a positive. I think that by presenting innovative ideas, I will have opportunity to grow as a leader as I encourage others to see the value of engaging through social media - to benefit marketing, human resources, and the overall perception of Kendal as a thought leader in the field of aging.



Nona Liechty

Organization: Fairlawn Haven

Title: Human Resource Director

Name of ALP: Restructuring of Organizational Chart for Top Team

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

Fairlawn has been experiencing complicated change and transition over the past two years. My tenure has only been two years. However, coming in from the outside, my observations in my role as a Human Resource Director indicate that the reporting structure of the Department Head members is much too large to be effective. Providing a more streamlined top management team will ensure more effective leadership capabilities from the position of CEO down to the entry level staff. Our previous CEO had been with the organization for 30 years and the managing and operating structure has never changed. Currently thirteen Department Heads report to the CEO/Administrator position.

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

The goals of the restructuring include the following: to improve the overall leadership of the organization and build trust company wide; to enhance the decision making processes to be more efficient; to do a better job of communicating with all employees so that the mission and vision of Fairlawn is carried out for the future; to build strong relationships in a more productive way that will allow Fairlawn to change, grow, and be designed to attract and meet the needs of future residents, and to remove barriers and improve teamwork

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

The Board of Trustees is acting as a sponsor for this project. It will have an impact on the CEO search that they are currently conducting. I have spoken with the board at their last meeting and they were supportive of this type of project. During this time of CEO absence, I am attending all board meetings and will be able to give periodic updates on my progress as needed.

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

My sponsor is Nanette Buehrer, our Director of Development and Community Services. She has been with Fairlawn for six years. Nanette is Co-managing with me during this interim time while our board is conducting a CEO search. I will also be discussing and gaining input from our board.

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

Reach out to other CCRC facilities to research other organization structures; contact several local Care Center facilities to observe their structures; make skill specific rather than position specific functions when placing the reporting set up; use my mentor for feedback on the structure so that I don't forget any skills and positions; conduct assessments to assemble the right team, Possibly the Standout assessment, and set up timelines and goals so I don't lose sight of the project.

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

I am learning not to procrastinate. I have a very busy schedule while stepping in as an interim co-manager and continuing to try to get my own work done as well. I am thinking about "What keeps me up at night" about this topic. In my position as HR Director, I need to be thinking constantly about how we can be structured to be more effective. I try to remember to use effective softball questions to drill deeper for answers. It is my job to be humble and ask what they need to get the job done. It is not about me getting the project completed. It is about preparing Fairlawn for the future. I will use softball questions to ask my mentor and the Board of Trustees for feedback in the development of Fairlawn's proposed organizational structure. It needs to be something that will work to carry Fairlawn into the future for the company growth and development. My hope is to use resources that I learned about other organizations that we toured, such as Twin Towers and Bethany Village. I was very impressed with their success after trying to place someone in a leadership position and finally reach success. I will be discussing this with my mentor and get reaction from the board. I have learned that this cannot be done overnight. It will take careful planning and time.



leadership academy
2015 Action Learning Projects



I have learned in class the mantra of “doing the hardest thing first.” We are at a crucible now at Fairlawn and I need to use this opportunity to redefine the jobs as people leave the organization. Being a servant leader means that I will work for others and not myself. The first role of a leader is to always take the blame no matter how painful it may be. The EQ activity that our team did for our presentation is one that I will take with me. How leaders react in situations is an opportunity to level the playing field to lead teams to success. It is a leader’s responsibility. This will be a team effort – not just my project. Success will depend on a common goal, working together, hold myself and others accountable, being organized, well trained staff and learning from our mistakes while moving forward. Most of all, I have learned from others that I need to consider what keeps me up at night; what are things I need to focus on to accomplish this project. Most of all building trust with others is critical at this time for me.



Tara R. Lloyd

Organization: Browning Masonic Community

Title: Director of Operations and Project Development

Name of ALP: Team and Family Communication Tactics Improve Satisfaction

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

Communication among our residents, staff and families is a key focus within our organization. With the expansion of an assisted living memory support addition, I felt the importance to keep the process of communication a concentrated effort with all audiences; understanding that with a larger staff, more families and more residents that systems would need to be in place to ensure we are communicated effectively.

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

Ensure team members understand the vision of our care structure and the channels of communication that are already in place; improve tools for staff to relay information and include a tool for them to check to see that the information has been attended to; develop a communication tool or outlet between staff and the family, and involve family and direct care staff in process and feedback.

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

My sponsor for the ALP is David Subleski, president of the community and my direct supervisor. We have had extensive conversations; he is in agreement that we need to maintain an environment of open conversation and processes to route feedback within the entire community. David is a key member in the team that works towards these goals.

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

This ALP is currently in process. We shared the importance of a concentrated effort for communication with our management team and gained consensus that we needed to seek a defined process for communication to channel. A small group was created to build our plan; we hold each other accountable for timely deliverables in the process and measures results along the way. The committee consists of me, the president of the community, director of health services, director of life enrichment and the resident services coordinator. We began by hosting meetings with all of our staff members so they could hear the current processes, know that the importance of quality of communication sharing even with a larger population of people to work among. They offered input with the current communication flow and we encouraged them to be a part of the process moving forward. We met with the nurses as a group first and then met with the resident assistants as a group. During these sessions we listened, better understood their current communication habits and wrote down staff's suggested ideas. After our sessions concluded we evaluated the communication processes in place and discussed what would be the best way forward to achieve our goal. We needed to address how staff connected with other staff and the nurse in charge; in addition we needed to define who should communicate to families and how that information should be captured so others knew the communications had occurred.

The current and continued steps are as follows:

Develop a flow that occurs between persons on the shift and with the nurse in charge; how that is documented and communicated between shifts. Develop a tool to document how information is communicated to the pertinent directors of departments who work as consultants within the day to day aspects of the neighborhood; host team building sessions to help staff work cohesively with one another on each shift and from one shift to the next; create monthly family gatherings as opportunities to engage socially and share information. Offering a communication venue and giving a level of transparency between us and families so that we can take input from them in the area of communication; create an email tool (HIPPPA appropriate) to direct to families weekly to keep families informed in a timely manner. This may include specific concerns along with standard information on weekly happenings with their loved ones; evaluate through the ongoing team sessions their response to the improved structure and adjust if necessary, and evaluate through a survey of family perspective after testing for a period of 4-6 months.



Brian MacDonald

Organization: Ultimate Rehab

Title: Rehab Team Manager, Physical Therapist

Name of ALP: New Employee Orientation

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

I chose my ALP because I knew Ultimate Rehab was starting to consider how to better complete new employee orientation. Being a rehab team manager I know what a vital part of the process orienting new employees is to the success of the new employee and Ultimate Rehab. I think streamlining and improving the orientation process will help Ultimate Rehab in numerous ways. It will create more consistent effective training of our staff in all areas, including electronic documentation which will help employees meet expectations quicker. A centralized employee orientation system will ensure greater likelihood that training is completed in a timely fashion and there is a clear understanding of all company policies and procedures. When a therapist has all the right knowledge in their new employment it makes their transition easier which benefits Ultimate Rehab, the employee, and the patients we are treating. Efficient orientations save time and energy for all involved.

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

Ultimate Rehab provides therapy services in nineteen different SNFs in three different states. The biggest goal of my ALP is to streamline our orientation process so that we have consistency in our orientation across all nineteen of our facilities. We have an established orientation in place but our current process requires the entirety of the orientation to be completed by the rehab team managers in each facility. This can lead to some variations in the orientation process or different emphasis on different items depending on the manager and we are committed to making the orientation process as consistent as possible across the board. Our goal is to provide the orientation through webinars and make 2-3 people within our organization responsible for all new employee orientation. This will allow our employees who travel to multiple facilities to feel like the expectations are clear and aren't different from facility to facility. The other objective is to lessen the load on the manager in the orientation process by communicating the straightforward information in another way and opening up more time for the manager to perform their other duties and serve our clients and patients.

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

Tom MacDonald the COO of Ultimate Rehab is my sponsor. We have had multiple conversations about the new employee orientation process. Tom and I, along with members of Ultimate's executive team are collaborating together through email and a shared google drive. We are sending and posting different ideas and options for ways to communicate to new employees and to streamline our current process across all facilities.

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

1. The selection of 2-3 people to assume training responsibilities.
2. Review all of our training material to determine which material can be delivered via a webinar and which is best delivered in person.
3. Development of an online webinar including an assessment test to insure understanding of policies and procedures.
4. A separate plan to train PRN staff before they begin. The focus will be on clinical procedures and the use of our online documentation system.



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

Throughout this Leadership Academy I am learning so much about myself as an individual and as a leader. Through the different personality assessments I have learned that I am a leader that is interested in the well being and satisfaction of those on my team. I work and collaborate well with others. I am learning the importance of not just partnerships within your organization but how important they are with those from other organizations as well. I am also learning my weaknesses as a leader. I need to be more direct with my expectations. In the past I have struggled at holding people accountable if they don't meet an expectation which can create problems in their performance and impact team cohesion. This is an area in my leadership, among many, that I am looking forward to developing. This academy has been invaluable in my development as a leader.



Cheryl McLaughlin

Organization: Ohio Presbyterian Retirement Services Foundation

Title: Associate Vice President of Finance & Administration

Name of ALP: Foundation Accreditation with the Better Business Bureau Wise Giving Alliance

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

During one of our board's 360 degree feedback sessions, the Board determined that accreditation would be a beneficial asset to the Foundation for those looking to donate to organizations that are transparent in how they govern their organization, how they spend their money and overall impact and effectiveness of their mission. Further accreditation will contribute to building credibility and trust with our donors, funders, vendors, professional service providers and governing agencies which, in turn, will help further our philanthropic endeavors. It is a one stop shop to validate that we have met a certain set of criteria related to the commitment to transparency.

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

My Vision:

To provide information that advances transparency and enables donors to make better informed decisions about who they donate to and why.

My Goals:

Tell Our Story/Education-Existing and potential donors looking to maximize where they are contributing can find our information on the web sites we have accreditation with.

Gain new donors as a result and build trust among our constituents.

Sharpen my leadership skills and confidence in working with senior leadership both in and outside the Foundation.

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

My sponsor is the President of the Foundation, Thomas Hofmann. We partner on several projects and he seemed a natural choice when it came to helping to tell our story. He has been with the Foundation for 35 years and counting. Tom and I usually meet monthly one-on-one and also monthly as part of the officer team. We will utilize this group for feedback and support ongoing.

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

My mentor is Dr. Mark Frohman. He is the Foundation's management consultant and has worked with the Foundation for over 20 years. He is a leadership coach to Tom Hofmann and an excellent, objective resource for me as I work through this process. We speak at a minimum quarterly, but for this particular project once a month.

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

My next steps are to review the application and work with different leaders in the organization to gather the documentation needed to complete the application. I will need financial information, communications information and leadership information. Second step is to set up a timeline for me to follow as I work with these different areas of the company to move forward smoothly. I will also work with a BBB Analyst to review each section and make sure we have submitted what they need.

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

I am learning that when you are leading a major project, not everyone works on the same timetable as you do. It's very important to communicate the needs you have for the project and then be patient. I've also become very passionate about this process and I want to receive the highest level that we can. I know when I think about our organization I am very proud to work as well as contribute to our cause, and I want others to view us that way also.



Sandy Skerda

Organization: Eliza Jennings Retirement Campus at The Renaissance

Title: Executive Director

Name of ALP: Mentor Program

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

Our community, like many others struggles with retention of Nursing Assistants. Turnover, particularly in this department impacts many areas including resident satisfaction, quality, overtime and training costs, and staff morale. Training and orientation have a great impact on how a new employee acclimates to their role and the speed in which they begin to feel a part of the community. Having a mentor allows the new employee to receive excellent training, and to have someone to go to with questions and concerns. Being a mentor offers exceptional employees the opportunity for growth and recognition. The impact of the Mentor Program will have many benefits to our community. With increased retention of STNAs, we will see better continuity of care for the residents resulting in greater satisfaction, increased quality of care due to excellent training, stronger financial performance related to reduced overtime to cover low staffing and the costs associated with new hires, and higher staff morale which impacts the overall environment for employees, residents, and families.

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

Increased retention of STNAs, increased satisfaction among employees, residents, and families and decrease in overtime.

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

I am working with our Human Resources Generalist on this project, along with the Director of Nursing. Both of these individuals bring expertise of training and development in their areas, and in the selection of the individuals to be mentored.

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

Create criteria and select mentors based on this criteria; review and revamp current new hire training process with full input from the mentors; create a bonus program for mentors based on longevity of mentee; analyze turnover data to determine success of mentor program, and analyze satisfaction surveys (employee, resident, family) to determine impact of mentor program.

Mentors have been selected for each assignment and are currently mentoring new employees. Since the program was instituted in May, 11 STNAs have been hired and assigned mentors. Of these, only 2 have left our employment. We will continue to monitor turnover and seek feedback from the mentors and the mentees. Additionally, we will continue to identify new mentors. If the program continues to be successful, we will expand the mentor program to other departments.

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

I am learning about my abilities to motivate others. I was surprised to find that some of the employees approached to be mentors were hesitant to take on the responsibility. My role as a leader was to clearly communicate the expectations of the role, assure them of my ongoing support, and help them to understand why they were chosen and to help them believe in their ability to succeed. I also had to keep the program moving forward by pulling the team together to accomplish the task of creating the structure and the details. Any new program is often met with apprehension, and a leader needs to create a confidence among the team.



Katie Tipton

Organization: Kendal at Home

Title: Care Coordinator

Name of ALP: Using Integrated Technologies to Enrich the Lives of Members of Kendal at Home

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

As Kendal at Home continues to grow in membership and service area, technology can be utilized as a tool for monitoring, managing and communicating. Kendal at Home began a relationship with Independa to introduce smart televisions to members for use in their homes. Taking this to the next level in having social features (Skype, photos and messages) along with telemedicine capabilities is the next logical step. One event that inspired me to take this initiative to the next level was the installation of one of the Independa televisions to a member who has impaired vision and hearing. The use of her telephone is no longer a feasible option for communicating with her family. We were able to get the Skype up and running for her and her son who lives in Colorado. They now talk to and see each other regularly. Plus, with the ability to adjust the volume on the television, the member can hear her son. This is a way to connect them which, prior to the installation, was lost. This initiative can help to increase the efficiency of our care coordination team, prevent an escalation of medical issues, and decrease social isolation of our membership.

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

I hope to increase the ability of members to use modern technology, with our guidance, to increase the quality of their lives.

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

Lynne Giacobbe, Executive Director. Lynne has been the initiator of this program for members and has approved the funding for the members to have the technology in their homes. I meet regularly with Lynne to review and update the progress of this initiative.

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

It is of utmost importance that we share a common voice/drive among the care coordination team to engage members in allowing for this initiative. I would make sure that the care coordination team had routine check-ins with each other- both in the formal weekly meetings and also throughout the week. Also, a support group/training group should be formed to meet or talk regularly about the benefits members have seen with the Independa system and to discuss solutions to common issues that may occur. I would also see a need to celebrate successes by publishing the positives to our entire membership to entice additional participation.

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

I am learning that I have to be patient with members as technology is a struggle for many of them. I am learning to overcome objections and to focus on the benefits of the technology. I am learning to take things slowly and to be a support through this process. I am learning to make sure that we all have a common voice in promoting this benefit. Most of all, I am learning that having a positive focus and outlook about this initiative can trickle down to the others around me.



Shnea Weatherspoon

Organization: McGregor Hospice

Title: Administrator

Name of ALP: Volunteer Vigil

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

I was inspired to develop a Volunteer Vigil program as my ALP because I believe that everyone should have someone with them at the end of life, especially if there is no family involved. This is important because at the end of life individuals may be afraid and need support, which does not have to be a health professional. Most of the time at the end of life an individual wants someone there to do a task as simple as holding their hand or praying with them. The Volunteer Vigil program will have a positive impact on McGregor Hospice along with the patients and families. The program will assist in relieving some of the stress during this transition.

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

I hope to give the hospice patient and family added support at the end of life. The other goal will be to have no elder transition without a caring person with them at the end of life. This is not just for the individual that is at the end of life, but also for their loved ones.

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

My sponsor for my ALP with the McGregor organization will be Ann Conn, COO who I directly report to in the organization. I will communicate with her weekly during our weekly meetings on the progress of Volunteer Vigil.

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

I have met with my Hospice Volunteer Coordinator to develop this Volunteer Vigil program for the organization. During this meeting I shared with her my idea for the program and explained to her how I was introduced to the idea. We then went on to talk about having specialized training for the volunteers that would focus on end of life. We obtained the tools for training. Our next step will be recruiting individuals who are interested in being a vigil volunteer. We are starting the program in November 2015. A month after the Volunteer Vigil is started; we will follow up with volunteers to see if they were provided the right tools and education for the program. The Volunteer Coordinator and/or Social Worker will follow up with the families to seek feedback on the program and its impact on the family.

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

During the process of completing my ALP, I learned that in order to accomplish my ALP I would need to develop a partnership with others. I would not have been able to develop the Volunteer Vigil program without reaching out to others for their assistance. Partnership is a big aspect of this process. I learned having a partnership with an individual that you trust is a very significant part of developing a project such as the Volunteer Vigil. If I didn't trust the individual with whom I was developing the program, the process would not have been as smooth. The process taught me to collaborate and appreciate the expertise of others.



leadership academy **2015 Action Learning Projects**



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

Through the course of my ALP I was reminded that leading is sometimes by support rather than taking charge. More than once, I or another on our committee could have jumped in to take a more aggressive approach to move this process along. We found in working through our communication situation it is important to utilize the channels (people) we already had in place; supporting them with tools and clearly defined expectations to get us to our goal. This tactic presents its own challenges, requiring patience, persistence and an ability to see the big picture.



Tim White

Organization: formerly with LeadingAge Ohio

Title: Director of Communications/Public Relations

Name of ALP: Maximizing Member Value Across Service Lines

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

Throughout my tenure with LeadingAge Ohio, my observation, echoed by others, is that there needs to be greater cross-divisional commitment to providing and tracking member value across different member services. If member value is defined throughout service offerings and tracked, it will provide the association greater insight into what members are utilizing from the association; allow the association to better determine value centers within association offerings; and, to provide greater value through member-driven service throughout all offerings. This in turn should positively impact membership recruitment and retention and, in a win-win for members and the association, member involvement in the association.

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

To provide templates for policies and procedures to help track member usage of service offerings and follow up for tracking and enhancing member activity.

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

For the sponsor, Kathryn Brod as LeadingAge Ohio President/CEO; but, it will also entail working closely with Valerie Davis as Director of Membership and will impact all levels of the staff. The primary follow through will be my delivery of a matrix of procedures for follow through and necessary templates for specific actions (thank you letters, releases, etc.). The primary responsibility will then be with the Membership Director to ensure the follow through process is completed, in partnership with respective staff.

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

Identify key member services; create a template for each service into a policy/procedure recommendation for identifying, delivering, tracking and measuring member service value; package the individual recommendations together for an all-encompassing member value tool kit; follow up from this can be to better identify value of services as well as what services are being utilized individually and through the larger membership.

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

To use learnings from the Academy in working with other staff, vendors and throughout work and life, including open-ended softball questions, non-judgmental statements and working collaboratively toward an identified common goal; to step back and let others take ownership of areas for which they need to be responsible. While I may see the end goal clearly early on, it is important to allow others to work toward that same vision and to have ownership in building the pathway toward that vision and work toward the outcome. It can be quicker to "just do it myself" but that does not allow others to build their skill sets to be able to envision their work flow and implement that work flow toward a common identified outcome; to use knowledge and influence for collaborative achievement – I have the experience and personality to help lead others to where they need to be; using that in a collaborative setting is key, rather than trying to force a vision on others.