

leadership academy

2026 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.



Tiana Benton

MDS Coordinator
Concordia at Sumner

Action Learning Project:

From Data to Care: Using MDS Data to Improve Resident Outcomes

Description

The purpose of this Action Learning Project is to develop and implement a proactive Quality Measure dashboard that uses real-time MDS data to identify residents at risk for adverse outcomes before they negatively impact resident care or CMS Quality Measures. The dashboard will be reviewed weekly by the interdisciplinary team to identify residents at risk for falls, pressure injuries, weight loss, depression, functional decline, antipsychotic use, catheter use, and other key Quality Measures. The project will establish a standardized early intervention process so that appropriate disciplines can implement preventive interventions before issues worsen. The long-term goal is to improve resident outcomes, strengthen interdisciplinary collaboration, and improve the organization's Quality Measures and Five-Star performance.

What inspired you to choose your ALP?

As an MDS Coordinator, I have learned that MDS is much more than a reimbursement tool. The information collected tells the story of each resident and provides valuable insight into changes in conditions that can be used to improve outcomes. Too often, organizations review Quality Measures after the fact, when opportunities for prevention have already passed. I wanted to develop a process that uses the information we already collect to proactively identify residents who are at risk and engage the interdisciplinary team in earlier interventions.

How will this impact your organization?

This project is expected to positively impact several areas of the organization. By using MDS data proactively, the interdisciplinary team will be able to identify residents at risk for decline before adverse outcomes occur. This will improve resident outcomes by allowing earlier interventions and reducing preventable complications such as falls, pressure injuries, weight loss, and hospital readmissions. The dashboard will also improve communication among nursing, therapy, dietary, social services, and providers by creating a standardized process for reviewing high-risk residents. In addition, the project will strengthen the facility's QAPI program, improve CMS Quality Measures and Five-Star performance, increase survey readiness, and promote greater collaboration across departments.

Goals

The primary goal of this project is to develop a weekly Quality Measure dashboard that provides the interdisciplinary team with real-time information about residents who may be at risk for decline. Additional goals include creating a standardized review process, reducing preventable adverse outcomes, improving CMS Quality Measure performance, and increasing staff understanding of how MDS data can be used to improve resident care rather than simply meeting regulatory requirements.



TIANA BENTON | CONCORDIA AT SUMNER

How will success be measured?

Success will be measured using both clinical outcomes and process measures. Clinical outcomes will include reductions in falls, new pressure injuries, significant weight loss, hospital readmissions, and worsening PHQ-9 scores. Organizational outcomes will include improvements in CMS Quality Measures and Five-Star ratings. Process measures will include the number of high-risk residents identified before experiencing a decline, consistent interdisciplinary participation in weekly reviews, and staff feedback regarding the effectiveness and usefulness of the dashboard.

Sponsor

My primary project sponsor is my Administrator, who will provide leadership support, guidance, and help remove barriers throughout the implementation of this project. To keep my sponsor engaged, I will provide regular progress updates, review dashboard metrics, discuss successes and challenges, and seek feedback during each phase of implementation. I will also share measurable outcomes, including improvements in resident care processes and Quality Measures, to demonstrate the project's impact and ensure continued support. Maintaining consistent communication throughout the project will help keep the project aligned with organizational goals and allow for timely adjustments when needed.

Process

The project will be implemented over a six-month period. During Month 1, current Quality Measure performance will be reviewed, high-risk indicators will be identified, and key stakeholders will be engaged. In Month 2, the Quality Measure dashboard and workflow will be developed, and reporting responsibilities will be established. Month 3 will focus on piloting the dashboard on one nursing unit to evaluate its effectiveness. During Month 4, data will be collected, feedback will be obtained, and necessary revisions will be made. Month 5 will include implementation throughout the facility, followed by Month 6, which will focus on evaluating outcomes, reviewing project success, and identifying opportunities for ongoing improvement.

Challenges

Several challenges may arise during implementation. Gaining staff buy-in may be difficult because the project introduces a new workflow and additional weekly collaboration. Time constraints and competing priorities could make it challenging for staff to consistently participate in meetings. Maintaining accurate and timely MDS data will also be essential because the dashboard depends on reliable information. Addressing these challenges through education, communication, and leadership support will be critical to the project's success.

Leadership strengths tested

This project will strengthen several important leadership skills while allowing me to build upon both my DISC and StrengthsFinder results. As someone with a high S (Steadiness) DISC style, I naturally value collaboration, consistency, patience, and building trusting relationships with others. My StrengthsFinder themes of Harmony, Relator, and Learner also support this project. Harmony will help me bring the interdisciplinary team together to find common goals and work through differing perspectives. Relator will allow me to build strong working relationships with team members, encouraging open communication and trust throughout the implementation process. My Learner strength will motivate me to continuously evaluate data, seek feedback, and make improvements as the project evolves. While these strengths provide a solid foundation, this project will also challenge me to become more confident leading change, influencing others without direct supervisory authority, and communicating a clear vision that inspires others to embrace a proactive approach to resident care.



Leah Bentley,
Compliance Officer
McGregor PACE

Action Learning Project: A Systems-Based Approach to Workforce Retention in Long-Term Care Facilities

Description

This Action Learning Project (ALP) will significantly impact the organization by addressing one of the most persistent challenges in long-term care: high employee turnover driven by instability outside of work. By implementing a workforce wraparound support model, the organization seeks to reduce barriers that contribute to absenteeism, burnout, and voluntary turnover among nursing, dietary, and housekeeping staff.

Internally, improved employee stability is expected to lower turnover rates, reduce reliance on agency staffing, improve staffing consistency, and decrease overtime costs. A more stable workforce will also enhance team cohesion, communication, and efficiency across departments.

At the resident level, workforce stability directly improves continuity of care and services. Residents benefit from consistent caregivers, dietary staff, and housekeeping personnel who understand their preferences, routines, and needs. This consistency strengthens caregiver-resident relationships, improves trust, and enhances overall quality of life.

At the broader community level, this project addresses social determinants of employment stability such as transportation insecurity, housing instability, childcare gaps, and financial strain. By connecting employees to essential community resources, the organization positions itself as a stabilizing force within the local workforce ecosystem and contributes to broader public health and workforce sustainability efforts in long-term care.

What inspired you to choose your ALP?

This Action Learning Project was inspired by recurring workforce stability challenges observed in our organization's long-term care facility, particularly the high turnover rates among frontline staff across nursing, dietary, and housekeeping departments. In reviewing patterns of employee attrition, it became evident that turnover is often driven not only by workplace factors such as workload and scheduling, but also by external social and economic stressors that directly impact our employee's ability to remain consistently employed.

Rather than focusing solely on traditional retention strategies such as wage adjustments or career advancement pathways, this project was developed to explore a more comprehensive and systems-based approach. Many employees face barriers such as transportation insecurity, housing instability, childcare challenges, and financial strain, all of which contribute to absenteeism and voluntary turnover.

This project was therefore selected to examine whether addressing these underlying social determinants of employment stability through a structured wraparound support model could improve retention, strengthen workforce consistency, and enhance continuity of care for residents. It aligns with the broader goal of creating a more supportive, stable, and sustainable work environment in long-term care.



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Ultimately, the inspiration for this ALP stems from the recognition that improving retention requires not only workplace improvements, but also intentional support for the real-life challenges that affect employees beyond the workplace.

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

This Action Learning Project (ALP) will have a significant impact on the organization by addressing one of the most persistent challenges in long-term care: workforce instability due to high turnover across nursing, dietary, and housekeeping departments. By implementing a structured wraparound support model, the organization will directly target key non-workplace barriers that contribute to employee attrition, including transportation insecurity, housing instability, childcare needs, and financial stress.

Within the organization, the anticipated impact includes improved employee retention, reduced turnover rates, and greater workforce stability across all frontline departments. As employees experience increased access to practical supports and community resources, they are more likely to maintain consistent attendance, reduce unscheduled call-offs, and remain employed longer. This stability is expected to decrease reliance on costly agency staffing and overtime while improving operational efficiency and team cohesion.

For residents, the impact is equally important. Increased workforce stability promotes continuity of care and services, allowing residents to develop consistent, trusting relationships with caregivers in nursing, dietary, and housekeeping roles. This continuity enhances resident satisfaction, safety, and overall quality of life, while also supporting a more person-centered care environment.

At the broader community and field level, this project contributes to an evolving understanding of workforce retention in healthcare. Rather than focusing exclusively on compensation or career advancement, it highlights the importance of addressing social determinants of employment stability as a viable retention strategy. If successful, this model could be replicated in other long-term care facilities and healthcare organizations facing similar workforce shortages, potentially influencing broader workforce development and retention practices within the industry.

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

The primary goals of this Action Learning Project (ALP) are to improve workforce stability, enhance employee well-being, and strengthen continuity of care across nursing, dietary, and housekeeping departments in a long-term care setting through the implementation of a structured wraparound support model.

At the organizational level, the project aims to reduce overall staff turnover by 20% within 12 months by addressing key non-workplace barriers that contribute to employee attrition. A related goal is to improve employee retention rates and increase average length of employment across all frontline departments. The project also seeks to decrease absenteeism, tardiness, and unscheduled call-offs by providing employees with access to support such as transportation assistance, childcare resources, housing navigation, and financial stabilization services.

Another key organizational goal is to reduce reliance on agency staffing and overtime hours by improving internal workforce stability. In addition, the project aims to improve employee engagement, job satisfaction, and intent-to-stay scores by ensuring staff feel supported both professionally and personally. Establishing a Workforce Resource Liaison role and creating formalized access to community-based services are also central goals of the intervention.



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At the resident level, the project seeks to improve continuity of care and service consistency by reducing staff turnover across all departments. More stable staffing is expected to enhance caregiver-resident relationships, improve communication, and increase resident satisfaction with care, meals, and environmental services.

At the broader community and field level, the project aims to demonstrate that addressing social determinants of employment stability is an effective and scalable strategy for improving retention in long-term care. If successful, the model could be adapted by other healthcare and long-term care organizations seeking innovative approaches to workforce challenges, potentially influencing retention practices across the industry.

How will you measure the success of these goals?

The success of this Action Learning Project (ALP) will be measured using a mixed-methods approach that includes quantitative workforce metrics, program utilization data, and qualitative feedback from employees and residents. Data will be collected both before implementation and at regular intervals during and after the intervention to assess changes over time.

Workforce Retention and Stability Metrics

The most important indicators of success will be changes in workforce stability across nursing, dietary, and housekeeping departments.

- Turnover rate (overall and by department)
- Retention rate at 6 and 12 months
- Average length of employment
- Vacancy rates across departments
- Comparison of pre- and post-implementation staffing stability

Attendance and Reliability Measures

Because wraparound services are expected to improve employees' ability to remain consistently at work, additional indicators will include:

- Absenteeism rates
- Frequency of unscheduled call-offs
- Tardiness rates
- Overtime utilization
- Agency staffing hours and cost

Improvement in these metrics will indicate increased workforce stability even before turnover changes are fully realized.

Success will be indicated by a measurable reduction in turnover with a target of 20% and increased retention across all frontline roles.

Wraparound Program Utilization Data

Effectiveness of the intervention will also be measured by how frequently employees use the support services offered:

- Number of employees utilizing transportation assistance
- Number of housing-related referrals and successful connections
- Childcare support utilization rates
- Financial assistance or emergency fund usage



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- Number of employees engaging with the Workforce Resource Liaison
- Higher utilization rates will demonstrate that services are accessible, relevant, and meeting employee needs.

Employee Experience and Engagement Measures

Pre- and post-implementation surveys will be used to assess changes in employee perceptions and satisfaction.

Survey domains will include:

- Job satisfaction
- Perceived organizational support
- Intent-to-stay in the organization
- Work-life balance
- Access to needed resources outside of work
- Perceived stress related to transportation, housing, or childcare

Focus groups and stay interviews will also be conducted to provide deeper qualitative insight into employee experiences and the perceived impact of the program.

Resident and Organizational Impact Measures

Because workforce stability directly affects resident care, additional outcomes will include:

- Resident satisfaction scores
- Family feedback regarding consistency of staff
- Observations of continuity of care across units
- Reduction in disruptions caused by staffing changes

These measures will help evaluate whether improved employee stability translates into improved resident experience.

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

The sponsor and I envision this Action Learning Project as directly aligned with the organization's most urgent priorities related to workforce stability, financial sustainability, and quality of care in our long-term care facility. High turnover across nursing, dietary, and housekeeping departments has created ongoing staffing shortages, increased reliance on agency staffing, elevated overtime costs, and challenges in maintaining consistent resident care.

This ALP supports organizational goals by proposing a structured wraparound support model that addresses key non-workplace barriers affecting employee retention, including transportation, housing instability, childcare access, and financial stress. These factors are already impacting attendance, turnover, and engagement within the workforce.

From a strategic perspective, the sponsor views this project as an opportunity to shift from reactive staffing solutions to a proactive retention strategy that strengthens workforce stability across all frontline departments. This aligns with broader organizational priorities such as improving employee engagement, reducing labor costs associated with turnover, enhancing regulatory readiness, and improving resident satisfaction through more consistent staffing and continuity of care.

Additionally, the inclusion of nursing, dietary, and housekeeping staff ensures that the project reflects a whole-facility approach rather than a siloed intervention, which aligns with the organization's emphasis on interdisciplinary collaboration and resident-centered care.



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

To ensure consistent sponsor engagement throughout the ALP, a structured communication and feedback plan will be implemented.

First, the sponsor will receive regular progress updates, including monthly summary reports that highlight key workforce metrics such as turnover, absenteeism, program utilization, and early outcome indicators. These updates will provide clear, data-driven insight into project performance and emerging trends.

Second, bi-weekly or monthly check-in meetings will be scheduled with the sponsor during the planning and implementation phases. These meetings will be used to review progress, discuss barriers, and make timely decisions regarding any necessary adjustments to the program design or implementation strategy.

Third, the sponsor will be engaged in key decision points throughout the project, including the selection of community partners, finalization of wraparound services, and design of the Workforce Resource Liaison role. This involvement will ensure alignment with organizational capacity, budget considerations, and operational priorities.

Fourth, visual dashboards or scorecards that summarize key performance indicators in an accessible format, will be submitted to the sponsor, allowing the sponsor to quickly interpret progress without needing to review detailed reports.

Finally, open and responsive communication channels will be maintained, ensuring that any emerging risks, challenges, or opportunities are communicated promptly. This will support shared ownership of the project and allow the sponsor to actively guide its direction as it evolves.

Overall, this engagement strategy is designed to maintain transparency, build trust, and ensure that the ALP remains closely aligned with organizational priorities while allowing for real-time collaboration and decision-making.

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

The Action Learning Project (ALP) will be completed using a structured, phased implementation approach grounded in continuous quality improvement. The process includes data collection, program design, pilot implementation, evaluation, and scale-up. It intentionally incorporates input from organizational leadership, frontline staff across nursing, dietary, and housekeeping, as well as external community partners.

Phase 1: Assessment and Discovery (Months 1–2)

Key Activities

- Collect baseline workforce data:
 - Turnover rates (nursing, dietary, housekeeping)
 - Retention rates
 - Overtime and agency staffing usage
 - Absenteeism and call-off trends
- Conduct employee surveys assessing:
 - Transportation access
 - Housing stability
 - Childcare needs
 - Financial stressors



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- Intent to stay
- Conduct focus groups with frontline staff
- Review exit interview data for common themes
- Identify departments with highest turnover and instability

Stakeholders Involved

- Executive leadership
- Human Resources
- Nursing leadership (RNs, LPNs, CNAs)
- Dietary supervisor and staff representatives
- Housekeeping/environmental services leadership and staff
- Quality Improvement (QI) team

Phase 2: Planning and Program Design (Months 2–3)

Key Activities

- Design Workforce Wraparound Support Model:
 - Transportation assistance plan
 - Childcare referral system
 - Housing support partnerships
 - Financial hardship support options
- Define scope and structure of Workforce Resource Liaison role
- Establish referral pathways for employees
- Develop community partnerships:
 - Local housing agencies
 - Childcare providers
 - Transportation services
 - Social service organizations
- Create communication plan for employees

Stakeholders Involved

- Executive leadership (final approval authority)
- HR leadership (policy and benefits alignment)
- Finance department (budget planning)
- Legal/compliance (as needed)
- Community-based organizations and service providers
- Nursing, dietary, and housekeeping department managers (workflow input)

Phase 3: Pilot Implementation (Months 4–8)

Key Activities

- Launch pilot program in selected units or departments
- Hire or designate Workforce Resource Liaison
- Begin employee enrollment in wraparound support services
- Provide transportation, housing, childcare, and financial navigation support



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- Conduct onboarding sessions for employees explaining available services
- Begin monthly tracking of utilization and workforce metrics
- Hold regular check-ins with pilot units

Stakeholders Involved

- Workforce Resource Liaison (central coordinator)
- Pilot unit managers (nursing, dietary, housekeeping)
- Participating frontline staff (employees using services)
- HR and payroll (support for financial assistance programs)
- Community partners providing services
- QI team (data tracking and analysis)

Phase 4: Evaluation and Midpoint Review (Months 8–10)

Key Activities

- Analyze pre- vs post-implementation data:
 - Turnover and retention trends
 - Attendance and call-offs
 - Overtime and agency usage
 - Conduct employee satisfaction surveys
 - Hold focus groups to assess program effectiveness
 - Identify barriers to participation or access
 - Adjust program design based on feedback

Stakeholders Involved

- Executive leadership (review findings)
- HR and QI team (data analysis)
- Workforce Resource Liaison
- Frontline employee representatives
- Department managers

Phase 5: Expansion and Sustainability Planning (Months 10–12)

Key Activities

- Expand successful components to all departments
- Refine wraparound services based on pilot outcomes
- Develop long-term funding and sustainability plan
- Formalize Workforce Resource Liaison role if not permanent
- Present final outcomes to leadership

Stakeholders Involved

- Executive leadership (final decision-making)
- Finance department (sustainability planning)
- HR leadership (policy integration)
- Department heads (implementation scaling)
- Community partners (ongoing collaboration)



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Resident and Community Involvement

Although residents are not direct participants in the intervention, their input and outcomes are critical:

- Resident satisfaction surveys (care, meals, housekeeping)
- Family feedback on consistency of staff
- Quality-of-life indicators related to continuity of care

Community stakeholders also play a key role in:

- Housing support networks
- Transportation services
- Childcare providers
- Local social service agencies

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

Several steps within the ALP process have the potential to significantly reshape or challenge the direction of the project due to operational, financial, and cultural factors within the organization.

One of the most sensitive phases is Phase 2 (Planning and Program Design), particularly the development of the wraparound services infrastructure. Securing sustainable funding, defining the scope of services, and establishing partnerships with external community agencies may alter the scale or feasibility of the program. If financial or legal constraints emerge, the project may need to be narrowed or prioritized to focus only on the highest-impact supports.

Another potential disruption point is Phase 3 (Pilot Implementation). This phase relies heavily on employee engagement and participation. If utilization of wraparound services is lower than expected, or if employees are hesitant to engage due to stigma, trust concerns, or lack of awareness, the project may need to be redesigned in real time. Additionally, variability in department-level leadership support could impact consistent implementation across nursing, dietary, and housekeeping units.

The Workforce Resource Liaison role is also a critical factor. If this role is under-resourced, unclear in scope, or not fully integrated into organizational workflows, it could become a bottleneck that limits program effectiveness.

Finally, Phase 4 (Evaluation) has the potential to reshape the project if early data does not show expected improvements in retention or attendance. In such a case, the organization may need to reassess which components are most effective and adjust or eliminate underperforming elements.

Ensuring the group tests the process and reexamines goals and measures of success

To ensure continuous evaluation and adaptability throughout the ALP, the project will incorporate several structured feedback and review mechanisms.

First, the project will use a continuous quality improvement approach, including monthly data reviews of key performance indicators such as turnover, absenteeism, and program utilization. These frequent check-ins will allow the team to identify early trends and make timely adjustments rather than waiting until the end of the project.

Second, regular stakeholder feedback loops will be established, including frontline staff focus groups, department manager check-ins, and leadership review meetings. These sessions will provide qualitative insight into how the program is functioning in real time and whether adjustments are needed.



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Third, the project will include a midpoint reassessment (around 6 months) where initial goals, assumptions, and measurement strategies will be formally reviewed. This will allow the team to determine whether the original success metrics remain appropriate or require modification based on real-world implementation data.

Finally, the project will maintain a flexible evaluation framework, allowing for adjustments in both interventions and measurement strategies if new barriers or opportunities emerge. This ensures the ALP remains responsive to workforce needs while maintaining alignment with the overall goal of improving retention and workforce stability.

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

As an SC/CS leadership style (scores were 100% in each area), this Action Learning Project will likely test both the relational stability and the analytical precision that characterize my approach to leadership, particularly in the context of managing organizational change within a complex long-term care environment.

One area that will be significantly tested is comfort with rapid change and ambiguity. SC/CS leaders typically prefer structured environments, predictable processes, and carefully planned implementation. However, this ALP involves dynamic, real-time adjustments based on employee feedback, utilization patterns, and organizational constraints. The need to pivot program design-especially during pilot implementation-may require increased flexibility and comfort with uncertainty.

Another area that will be challenged is influencing across resistance or competing priorities. While SC/CS leaders are strong collaborators and listeners, this project will require advocating for system-level changes such as new resource allocation, role creation, and cross-departmental participation. Navigating resistance from leadership, frontline staff, or financial stakeholders may require more assertive influence and negotiation than is typically preferred.

Additionally, the project will test decisiveness in data interpretation and action-taking. Although conscientiousness supports strong data analysis and attention to detail, the ALP will require making timely decisions even when data is incomplete or evolving. Balancing accuracy with the need for forward momentum will be an important leadership stretch.

Finally, the project will challenge capacity to manage emotional and human complexity at scale. Because the wraparound model addresses sensitive issues such as housing insecurity, childcare, and financial stress, there may be emotionally charged situations involving employees. While the steadiness trait supports empathy and supportiveness, maintaining appropriate boundaries while managing organizational expectations will be an important leadership development area.

How my DISC strengths will also support success

At the same time, my strengths will be an asset throughout the project. The steadiness dimension will support trust-building with frontline staff, consistency in communication, and follow-through with employees who rely on wraparound services. The conscientiousness dimension will support strong data tracking, process development, and careful evaluation of outcomes. These strengths will be particularly valuable in ensuring the program is implemented reliably and evaluated rigorously.

Overall, this ALP will stretch my leadership by requiring greater adaptability and influence while still allowing me to leverage my strengths in consistency, structure, and data-driven decision-making.

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

Response not provided in the submitted Word document.



Nicole Daniels

Executive Director
Otterbein SeniorLife Green Hills

Action Learning Project: Trauma-Informed Care Program

Please provide a clear, concise description of your project.

My ALP focuses on developing a trauma-informed care program to strengthen how we support residents who have experienced traumatic events. This work is especially meaningful to me because I believe every resident deserves care rooted in compassion, understanding, and dignity. Through this program, I hope to equip our partners with the education, resources, and practical tools needed to respond with confidence and empathy to the lasting effects of trauma. By focusing on resident assessment, education, and practical tools, this initiative will help us provide more informed, supportive, and person-centered care.

What inspired you to choose this ALP?

Nearly two-thirds of people in America will experience a traumatic event in their lifetime. Trauma can take many forms—it could be watching your daughter and sister be taken from your home by an EF5 tornado while you stand helpless, holding your four-year-old son, as my grandmother did in 1954. It could be surviving abuse in a relationship during your teenage years, as I did from ages 15 to 18. Or it could be a near-drowning experience in childhood that leaves you with a lifelong fear of water, like a resident in long-term care at one of our communities. Trauma does not discriminate, and its effects are deeply personal.

When my grandmother was living with Alzheimer's disease in a long-term care facility, she relived the trauma of searching for her daughter, Barbara, after the tornado destroyed their home every day. The staff did not have the education or resources to fully support her in those moments. I have also seen our partners struggle to understand and care for residents who have experienced trauma. This program matters deeply to me because it will give our partners the tools, education, and confidence to care for residents with greater understanding, compassion, and skill during vulnerable moments.

What impact do you hope this ALP will have?

I hope this program will have a meaningful impact on both our partners and the residents we serve at Otterbein SeniorLife. For our partners, it will provide the education, resources, and practical tools needed to respond with greater confidence and compassion when a resident is remembering or reliving a traumatic event. It will also strengthen their ability to care for residents holistically, with a deeper understanding of how trauma shapes a person's experiences and needs. For residents and their families, I hope this program brings greater comfort and peace of mind, knowing they are cared for by people who recognize the effects of trauma and respond with empathy, dignity, and support during vulnerable moments.



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What are the primary goals of your ALP?

The primary goal of this program is to equip our partners with the education, resources, and practical tools needed to care for residents who have experienced trauma with greater understanding, compassion, and confidence. It is also designed to strengthen our ability to recognize the lasting effects of trauma and respond in ways that are informed, supportive, and person-centered. Ultimately, this program aims to build a stronger foundation for care that honors each resident's experiences, dignity, and individual needs.

How will you measure success?

I will measure the success of this program by gathering feedback from both our partners and the residents and families we serve. For our partners, success will be reflected in survey responses showing whether they feel more prepared, supported, and confident in caring for residents who have experienced trauma, along with suggestions for continued improvement. For residents and families, success will be measured through satisfaction surveys and feedback gathered through the established Otterbein Shepherd Program. Together, these insights will help determine whether the program is strengthening trauma-informed, compassionate, and person-centered care across our communities.

How does your ALP align with your organization's needs and priorities? How does this project connect with what your organization cares about? How will you keep your sponsor engaged?

My ALP aligns closely with Otterbein SeniorLife's mission, "Inspired by faith, we strive to enrich individual life journeys for all," and its vision, "To be The Best Place to live, to work, for care, and for a fulfilling future." This project reflects our organization's commitment to providing compassionate, person-centered care that honors each individual's life story, preferences, and needs.

When residents and their families choose our community as their home, they place a great deal of trust in us. To provide the best possible care, we must understand each resident's life experiences, preferences, and any challenges that may influence how they receive and respond to care. This program supports that commitment by giving our partners another meaningful tool to better understand and care for those we serve.

This program will support not only our care partners, but also those in ancillary departments, by equipping them with the tools needed to care for residents in a more holistic way. Caring for a resident means more than meeting medical needs—it also means recognizing and supporting their emotional, mental, and spiritual well-being.

I plan to keep my sponsor engaged through regular one-on-one meetings, where I can share progress, ask for guidance, and ensure continued accountability as the project moves forward. Maintaining that connection will help strengthen the project and keep it aligned with both organizational priorities and the goals of this work.

What is your process and timeline?

My process will begin with meetings with my sponsor and other senior leaders across the organization to discuss the program's purpose, core elements, and overall design while building the support needed to move the work forward. These leaders will include the AVP of Southwest Communities, VP of SeniorLife Communities, AVP of Clinical Quality, and Special Projects Coordinator.



NICOLE DANIELS | OTTERBEIN SENIORLIFE GREEN HILLS

From there, I will use Otterbein's Change Management System to guide the work by clearly defining the opportunity for change, inspiring momentum, building a coalition, communicating the vision, enabling action, creating short-term wins, sustaining acceleration, and celebrating successes as the change becomes more fully embedded.

Once that foundation is in place, I plan to pilot the program at Otterbein SeniorLife Green Hills so we can learn from the experience, strengthen the approach, and ensure it is both practical and meaningful for those providing care.

After the pilot, I will present the outcomes and recommendations to Executive Leadership with the goal of supporting broader implementation across all locations. This phased approach will allow the program to grow thoughtfully while staying aligned with the needs of our organization and the residents we serve.

Which parts of your process might reshape or complicate your project? How will you build in reflection and learning?

As I begin meeting with senior leaders across the organization, I expect they may offer valuable insight and recommendations that strengthen the program and shape its development in meaningful ways. While that input will be beneficial, it will also require me to remain flexible as the project evolves. Reflection and learning will be essential throughout this process, and Otterbein's Change Management System provides a strong framework for both. Its steps naturally create opportunities to pause, gather feedback, reflect on what is working, and make thoughtful adjustments along the way.

Another important part of this work will be gaining the trust, participation, and support of residents and families. Conversations about trauma can be deeply personal and often difficult to revisit, so it will be essential to create a process that honors each resident's privacy and lived experience. At the same time, we will need to ensure our partners are prepared to respond with sensitivity and compassion while still meeting each resident's individual needs. Building that balance into the program will be an important part of both the challenge and the learning.

Which of your leadership strengths (e.g., DISC style, StrengthsFinder themes, or other leadership tools from the Academy) do you think will be most tested or stretched during this process?

One of the leadership strengths that may be most tested during this process is my deep emotional connection to the purpose and potential impact of this project. Because this work matters so much to me—and because I care deeply about the residents, families, and partners it is intended to support—I will need to balance that passion with attention to detail and realistic expectations. To do that well, I will need to remain open to the insight, accountability, and suggestions of other leaders throughout the process. I will also need to remember that healthy conflict can be a valuable part of growth and that moments of disagreement can strengthen the project when approached with openness and trust.

How would you like your mentor to support you with your ALP? How will you stay in touch with your mentor about your project?

My mentor is also a member of our Senior Leadership Team, which makes their support especially valuable as this program develops. Their perspective and involvement will help strengthen the work and keep it aligned with the broader goals of the organization.

I meet with my mentor regularly, and I plan to keep the project as an ongoing part of our conversations. This will give me the opportunity to share progress, seek guidance, and stay connected to their insight and support throughout the process.



Ashlee Day

Director of Nursing
St. Francis Senior Ministries

Action Learning Project: Artists in Residence

Description

Develop and implement an Artists in Residence Program in our Continuing Care Retirement Community (CCRC). The program will utilize a currently vacant villa to house 2–3 master's-level students in creative disciplines (music, art, theater, dance, creative writing, or art therapy) in exchange for structured engagement with residents across Independent Living, Assisted Living, and Skilled Nursing/Long Term Care. The goal is to enhance resident quality of life while building partnerships with local universities (Tiffin University and Heidelberg University).

What inspired you to choose your ALP?

Seeing the positive impact Artists in Residence had on both resident and student lives at Judson Manner was very inspirational. This project's proven success in other CCRC is encouraging as well. The project combines resident-centered care with community partnerships while utilizing a vacant campus asset filling diverse objectives.

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

Increase resident engagement; reduce loneliness; promote wellness through the arts; strengthen community relationships; establish university partnerships; utilize a vacant villa that has been unoccupied for 5+ years; differentiate our CCRC as an innovative leader. Located on a historic campus established in 1869, the Artists in Residence Program would continue the longstanding tradition of the Sisters of St. Francis' appreciation for music, pottery, and the arts. Reintroducing a similar program would be a meaningful addition for the residents of our campus, honoring the legacy of the Sisters, who served as the facility's original caregivers and employees, while enriching the lives of those we serve today.

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

- Develop a sustainable program that will continue
- Secure university partnerships (Tiffin University & Heidelberg University)
- Recruit 2–3 master's-level students for full year leases or at least 9 month leases
- Launch a pilot serving all levels of care in the CCRC; measure participation and satisfaction.

How will you measure the success of these goals?

- Resident participation (record the number of resident attending student lead activities across all campuses)
- Resident/family satisfaction (monthly resident surveys and quarterly family surveys to gauge satisfaction)



ASHLEE DAY | ST. FRANCIS SENIOR MINISTRIES

- Number of university partnerships
- Number of student residents (length of staff, success rate with students)
- Monthly programming hours
- Retention and sustainability after pilot.

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

The Artists in Residence program supports resident-centered care and enhances quality of life. As the only non-profit organization in our community, St. Francis needs a program like this that is innovative while strengthening community partnerships in our small community.

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

I plan to provide monthly electronic updates and quarterly in person updates/summaries of success. I will share milestones as they are reached, review budgets and timelines and request feedback at quarterly board meetings. Final outcomes will be reviewed after the completion of the first program.

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

I will be reaching out to Kendra Urdzik from my Leadership Academy for the framework of the Artists in Residence Program that Judson Manor rolled out. Reach out to Tiffin University and Heidelberg University to discuss the program and student candidacy options. Discuss with grant writer grant opportunities to fund program costs (housing costs). September 2026: Presentation of the program to the board.

October/November 2026: Presentation of the program to the campus residents and families.

December 2026/January 2027: University outreach/marketing, open up applications for students for the 2027-2028 year. Touch base with grant writer on grants progress. March 2027: Select artists and prepare villa. August 2027: Launch pilot. May 2028: Evaluate outcomes.

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

- University partnerships (agreeing to program, student interest)
- Liability for students on campus
- Funding (will have to secure grants to fund)
- Scheduling (finding students to offer programming that compliments resident schedules)
- Resident participation.

I plan to address these issues through early planning, clear agreements, pilot implementation, and continuous feedback.



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Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

I haven't to maintain a flexible mindset, try to remain proactive and tackle any issue early on. Continuously monitoring feedback to modify the program will be key.

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

My two highest strength types in the DISC assessment were Stabilizing and Interacting. Having strengths in these areas will help for the collaboration, organization, communication and presentation components of this project. I tend to avoid conflict so that will be something I will need to be mindful of and tag my mentor in to help hold me accountable in situations of conflict that I may shy away from.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,

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

I plan to meet with my mentor regularly to review progress and discuss any challenges I may be facing. Helping hold me accountable to timelines and areas of conflict will be very beneficial too.

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

I am sending out a monthly standing meeting to review progress, I also work with my mentor daily so will be able to touch base whenever needed should anything unexpected arise.



Caitlin Distel

Administrator

Ohio Living Westminster-Thurber

Action Learning Project:

Cultivating Community Camaraderie and Resources

Description

Community shapes our choices, from where we live to how we interact. Senior living is no exception, relying on service and volunteerism to foster meaningful connections. This project enhances the existing volunteer program through two developmental phases: phase one for resident volunteers and phase two for outside community volunteers. In a demanding industry, drawing on the natural strengths of our residents ultimately optimizes staff efficiency and enriches campus life.

What inspired you to choose your ALP?

From my time in student organizations to my current faith and family life, service has always been a central pillar for me and those around me. Joining the senior living workforce made me realize that this drive to give back doesn't fade with age; the residents I serve naturally care for one another, filling operational gaps to strengthen their own community. This shared desire to contribute is an incredible, untapped resource. Empowering seniors to serve not only transforms organizational culture, but it also counters the loneliness and helplessness of aging by fostering new friendships, fresh ideas, and a profound sense of purpose.

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

Enhancing the volunteer program at Ohio Living Westminster-Thurber directly benefits both residents and staff amid a shifting healthcare landscape. By mobilizing independent living residents to volunteer, the campus can foster deep integration across independent, assisted living, and long-term care areas. These resident-led initiatives provide vital engagement and redirection for isolated or higher-need residents. Simultaneously, they alleviate staff burden regarding supervision and transportation to activities, allowing employees to focus on delivering higher-quality programming. Ultimately, this stronger campus culture creates a competitive advantage that attracts prospective residents seeking an engaged community.

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

The vision for this project is to transform a loosely defined volunteer structure into a robust, streamlined framework. At its heart, the program fosters a unified campus culture by bridging independent living with higher-care areas, breaking down the stigmas often associated with aging. By inviting local universities and organizations to give back, we can simultaneously shine a spotlight on senior healthcare, inspiring future generations to join the aging services workforce. Most importantly, this project aims to eliminate the complex organizational and regulatory hurdles that often discourage volunteers. By making service accessible and convenient, we can enrich our residents' daily lives and create a vibrant, connected community.



CAITLIN DISTEL | OHIO LIVING WESTMINSTER-THURBER

How will you measure the success of these goals?

Program success will be evaluated through both quantitative and qualitative metrics. Quantitatively, success will be demonstrated by an increased volume of resident and community volunteers, alongside a rise in total logged volunteer hours. Operationally, success will reflect in reduced staff time spent on resident transportation, supervision and redirection. Long-term qualitative success will be measured by enhanced cross-campus integration between independent living and licensed care areas. While many benefits are inherently qualitative, resident satisfaction surveys and direct feedback from residents and families will serve to validate this cultural integration.

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?

Because I report directly to the Executive Director, who is also my sponsor, project communication will naturally be embedded into our regular discussions. She is highly supportive of this vision while acknowledging the significant effort required to reshape our volunteer framework. This initiative was already an organizational priority and during our monthly collaborative meetings with a core group of independent living residents, they also identified this untapped volunteer pool as a key area of focus. Given her campus-wide responsibilities, the Executive Director remains heavily invested in this program to elevate care quality and address resident feedback. In an era of tightening healthcare reimbursements, this project delivers an innovative alternative to ensure our community's long-term operational success.

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

Key Participants Include:

- Chaplain (Volunteer Coordinator): Manages tracking, reporting, volunteer interest and coordination.

Human Resource Partners: Onboard high-volume volunteers (>10 hours/month), manage screening and compliance for TB tests and background checks.

Activities Team: Coordinates event-based tasks. The Activities Director drives Phase 2 community partnerships in conjunction with the connections of the Foundation Gift Planner.

Resident Councils (Independent Living and Long-Term Care) & Families: Provide direct insights into resident needs and campus gaps. Families will provide key insight into resident-shared feedback that may not otherwise be known to staff.

Senior Leadership Team: Provides vision for possible volunteer tasks that would impact staff demand, resident quality of life, and gaps in operational effectiveness.

- Local Advisory Board: Reviews progress and champions community networks across both phases.

Implementation Timeline and Steps: Estimated 6 months

Audit: Review existing frameworks and identify current process weaknesses with HR, Activities, and the Chaplain.

Analyze: Assess past independent living resident interest surveys completed within the last two years.

Survey: Complete updated surveys with independent living residents for volunteer interest (collaboration partners: Director of Independent Living, Resident Service Coordinator, and Independent Living Resident Association).

Develop: Build out a structured listing of volunteer tasks and requirements (collaboration partners: Director of Nursing, Social Worker, Transitional Care Liaison and Long-Term Care Resident Council President).



CAITLIN DISTEL | OHIO LIVING WESTMINSTER-THURBER

Approve: Secure program sign-off from the Executive Director.

Launch: Present the rollout strategy to Resident Councils, Senior Leadership, and the Local Advisory Board.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

The success of this program depends heavily on its first step, leveraging key team player foundational experience with previous volunteer frameworks. The team will naturally raise regulatory, logistical, and historical concerns that must be addressed to shape future iterations. Navigating these hurdles and securing stakeholder buy-in is a necessary, foundational milestone for the project that needs to take place early on. While matching calendars in a hectic environment poses a risk to our immediate timeline, regular collaboration is essential to mitigate friction and keep the project on track for long-term sustainability.

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

While my strengths in structure and process improvement will benefit this program, I recognize the need to understand the perspectives of teammates who faced past operational challenges. Balancing my drive for achievement with an active sensitivity toward staff time commitments is a key focus area for me. Anticipating some resistance, I aim to lead through collaboration beginning with clearly communicating the overarching "why" behind this project to show how it ultimately supports both our staff and our residents.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,



Kari Dominique

HR Director
Fairlawn Haven

Action Learning Project:

Generations of Grace – “Encouraging Hearts Program” (Hebrews 10:24-25)

Description

Create meaningful connections between long-term care residents and members of the community through handwritten letters, fostering relationships, reducing loneliness, encouraging intergenerational engagement, and strengthening community partnerships.

What inspired you to choose your ALP?

The old “pen pal” program from when I was in grade school. It’s a simple yet powerful idea that handwritten letters can build a bridge between generations, encourage the heart, and remind someone they are seen valued and loved. Through sharing stories, offering encouragement, and building friendships, I hope to create lasting connections that enrich the lives of both the residents and the community partners. While residents have lived lives filled with wisdom, experiences, and stories, many experience loneliness or have fewer opportunities to connect with others outside the community. At the same time, members of our community are often looking for meaningful ways to serve, learn, and make a difference.

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

As a faith-based organization, this program reflects our commitment to living out God’s love through compassion, hospitality, and genuine human connection. Every small act of kindness can have a lasting impact, and every letter is an opportunity to bring hope, joy, and a sense of belonging to someone else’s life through multiple generations through, church, school, sports, and local families.

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

- Reduce social isolation among residents.
- Promote meaningful conversations and friendships.
- Connect residents with local schools, churches, civic organizations, veterans groups, and businesses.
- Encourage community involvement with the organization.
- Create opportunities for storytelling and preserving life experiences.

How will you measure the success of these goals?

- Number of participating residents
- Number of community volunteers



KARI DOMINIQUE | FAIRLAWN HAVEN

- Monthly letter exchange rate
- Resident satisfaction surveys
- Volunteer satisfaction surveys
- New community partnerships
- Stories and testimonials
- Reduction in reported loneliness (where measured)

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

This program directly supports our organization's mission to enhance the quality of life for every resident by creating meaningful opportunities for engagement, purpose, and connection. It will complement our activities department by providing a structured ongoing activity that encourages residents to reminisce, write, read, share stories, and engage in meaningful conversations. This program also strengthens our commitment to community outreach by building lasting relationships with local schools, churches, civic organizations, businesses, and volunteer groups. These partnerships create opportunities for intergenerational learning, service, and mutual encouragement while increasing awareness of our ministry and the lives of those we serve.

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

Celebrate participation through:

- Annual Pen Pal Appreciation Event
- Resident letter display (with permission)
- Community recognition certificates
- Newsletter highlights
- Social media stories (with consent)
- Volunteer appreciation recognition

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

Phase 1: Planning

Establish program goals & objectives Activities/Social Services

Identify resident participants Nursing & Activities

Recruit Community partners Marketing/Activities-Volunteer

Develop participation guidelines Leadership Team

Create consent form Social Services

Develop resident interest questionnaire Activities

Develop volunteer application Activities/HR

Create letter-writing schedule Activities



KARI DOMINIQUE | FAIRLAWN HAVEN

Phase 2: Recruitment

Resident Recruitment

Introduce program during resident council

Invite residents individually

Assess communication needs

Match residents based on interests

Community Recruitment

Local schools, colleges, churches, scout troops, sports teams, clubs, local business, libraries, rotary,

Phase 3: Matching Process

Collect information: hobbies, books, career history, military service, pets, sports, faith interests, family, music, gardening, travel experiences

Phase 4: Program Guidelines

Letter frequency

One letter each month

Optional holiday cards

Birthday recognition

Special seasonal themes

Safety

Staff review outgoing and incoming mail when appropriate

Protect personal information

No exchange of money or gifts without approval

Maintain resident privacy

Staff Support

Assist residents with writing, reading letters, mailing, addressing envelopes, decorative supplies

Program Timeline

Month 1

Planning – Recruitment – Resident Enrollment

Month 2

Community enrollment – matching participants – orientation

Month 3



KARI DOMINIQUE | FAIRLAWN HAVEN

First letters mailed

Month 4

Monthly exchanges – quarterly celebrations – recognition events

Resident Letter Kit (stationary, envelopes, pens, stickers, return envelopes, prompt cards, postage)

Monthly Themes

January = New Beginnings

February = Friendship

March = Favorite Memories

April = Spring Traditions

May = Family Stories

June = Childhood Summers

July = Patriotism

August = Favorite Vacations

September = School Memories

October = Harvest & Fall

November = Gratitude

December = Holiday Traditions

Community Partner Orientation (provide education on)

Aging and dementia awareness, respectful communication, appropriate topics, confidentiality, program expectations.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

Sustainability Plan

- Recruit new volunteers twice per year.
- Review resident matches quarterly and adjust as needed.
- Incorporate the program into volunteer orientation.
- Seek donations of stationery, stamps, and craft supplies from local businesses and community groups.

Evaluate the program annually and gather feedback from residents, families, staff, and volunteers to make continuous improvements.



KARI DOMINIQUE | FAIRLAWN HAVEN

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

OPTIONAL: If you plan to incorporate your mentor in your ALP process,



Diana Eberts-Wilson

Director of Nursing
Springfield Masonic Community

Action Learning Project: Good Neighbor Program

Description

-The Good Neighbor program is an excellent project that brings together the leadership team, staff, and residents, to improve quality of life in a long-term care (LTC) setting, to create a culture of kindness, connection, and belonging by empowering leaders, staff, and residents to become "good neighbors" who intentionally support one another every day.

What inspired you to choose your ALP?

What inspired me to choose this as my ALP was the desire to develop and foster relationships between our leadership team, staff and residents to ensure improved quality of life for the residents of our community.

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

The Good Neighbor Program will promote meaningful relationships, reduce loneliness, strengthen teamwork, and enhance resident-centered care through simple acts of compassion and service.

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

- Increase resident engagement and social connection
- Build leadership presence and visibility
- Foster teamwork across all departments
- Encourage staff recognition and appreciation
- Develop sustainable practices that will improve resident quality of life.

How will you measure the success of these goals?

I will measure the success of these goals by:

- Checking weekly with Activities to monitor an increase of resident participation;
- will participate in monthly Resident Council to inquire about improved resident and family satisfaction and will review our Pinnacle report that reflects resident and family responses and note if improvement is needed;
- will have weekly discussions in morning meeting with the Leadership team for feedback regarding increased leadership visibility and improved staff engagement and morale and will obtain positive stories and recognition shared throughout the organization during monthly Nursing department and all staff meetings.



DIANA EBERTS-WILSON | SPRINGFIELD MASONIC COMMUNITY

-Adjust the program based on feedback.

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

We envision this will improve resident outcomes through increased interaction and connection, that it will become more than an initiative—it becomes a way of life where every resident feels known, every staff member feels valued, and every leader demonstrates compassionate service through intentional daily actions.

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

We will meet and discuss on a weekly basis.

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

Lay out the plan and process to present.

Discuss with my Administrator/President the idea/plan.

Develop an educational plan to present to the facility Leadership team and obtain buy-in.

Present to and educate the facility Leadership team.

Present and educate the staff, residents via staff meetings and with the Resident Council president

Pilot the program in one "neighborhood" before expanding throughout the community.

Set a "go-live" date to roll out the program

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

The discussion with the Resident Council president may meet resistance or doubt. Ensure all information is presented effectively.

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

Being high in "interactive" and "cautious"—I will be tested in communicating this program and plan effectively, to be consistent and maintain enthusiasm. I will need to be a careful listener and adapt as needed.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,



Jennifer Feedback

Corporate Director; Workforce Management & Scheduling
Otterbein SeniorLife

Action Learning Project:

Bulletproof Universal Worker Methodology for Payroll Based Journal

Description

Craft a “bulletproof,” audit-defensible methodology, aligned with CMS Payroll-Based Journal expectations, to calculate the portion of Universal Worker/Elder Assistant CNA time that is attributable to reportable direct care versus non-reportable indirect household responsibilities. This strategy is specific to Otterbein’s Green House model locations, where Elder Assistants perform a blended role that supports both resident care and household operations.

The ALP will include review of current CMS PBJ guidance, internal payroll and scheduling practices, time study approaches, and audit expectations. It will also explore collaboration with other Green House or small-house model organizations to identify shared challenges created by vague regulatory language around universal workers and PBJ reporting.

The final work product will be a standardized methodology, supporting documentation package, and implementation plan that can be used consistently across Otterbein’s affected locations. If appropriate, the project may also include consultation with the legal team to determine whether prior audit results or related Five-Star implications should be challenged based on documentation, methodology, or comparable industry cases.

What inspired you to choose your ALP?

Payroll Based Journal reporting is a necessary and highly scrutinized requirement in skilled nursing, and it becomes especially complex in Green House and universal worker environments. Otterbein’s Elder Assistants support residents in a deeply person-centered model, but their daily responsibilities do not always fit neatly into traditional PBJ job categories. I chose this ALP because I want to protect the integrity of the Green House model while ensuring Otterbein has a defensible, consistent, and compliant approach to reporting care hours. The inspiration also comes from the risk that organizations may be unfairly penalized during PBJ audits when universal worker time is misunderstood or when CMS guidance does not clearly address the realities of small-house staffing models.



JENNIFER FEEBACK | OTTERBEIN SENIORLIFE

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

This ALP has the potential to significantly impact Otterbein by reducing PBJ audit risk, improving consistency across locations, and creating a reliable methodology for documenting and reporting Elder Assistant/CNA time. Internally, it will support compliance, operations, clinical leadership, payroll, scheduling, and finance by establishing one standard approach rather than relying on location-by-location interpretation. The financial impact is also significant. In Ohio, nursing facility reimbursement is directly influenced by quality measures and quality incentive calculations; staffing data and Five-Star outcomes can affect a facility's quality score, Medicaid per diem quality incentive payment, and overall reimbursement position. If a PBJ audit failure results in a one-star staffing or overall rating for even a three-month period, the impact can extend beyond public reporting. It may reduce quality points, jeopardize incentive dollars, affect referral confidence, create reputational risk, and require substantial leadership time to correct, explain, and defend the results. More broadly, the project may contribute to the field by helping demonstrate how universal worker models can be evaluated fairly within PBJ requirements without discouraging innovative, resident-centered staffing models.

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

The primary goal is to develop a standardized, audit-defensible methodology for calculating and documenting the portion of Elder Assistant/CNA time that is reportable for PBJ purposes. Additional goals include reducing regulatory and Five-Star risk, protecting Ohio Medicaid reimbursement tied to quality performance, improving confidence in PBJ submissions, creating consistent documentation practices across all Green House model locations, educating leaders on the methodology, and identifying opportunities to advocate for clearer industry guidance or more specific regulations on universal worker reporting.

How will you measure the success of these goals?

Success will be measured through both compliance outcomes and operational adoption. Key measures will include completion of a written methodology, validation by internal stakeholders, consistent use across applicable locations, reduction in manual interpretation or rework during PBJ preparation, and improved readiness for PBJ audit requests.

I will also compare baseline documentation practices to post-implementation practices, review sample payroll and scheduling data for consistency, gather feedback from location leaders and corporate stakeholders, and assess whether the methodology provides a clear evidence trail that can be explained and defended during audit review. In addition, I will evaluate whether the methodology helps protect Five-Star staffing results, avoids unnecessary loss of Ohio quality incentive points, and reduces the risk of a short-term one-star outcome that could affect reimbursement, market perception, and referral patterns for a full quarterly public reporting cycle.



JENNIFER FEEBACK | OTTERBEIN SENIORLIFE

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

My sponsor and I envision this ALP aligning directly with Otterbein's priorities around regulatory compliance, operational consistency, risk reduction, reimbursement protection, and preservation of the Green House model. PBJ data affects public reporting, Five-Star staffing measures, Ohio Medicaid quality incentive calculations, organizational reputation, and consumer perception, so a clear methodology supports both compliance and strategic positioning. A failed audit that results in a one-star rating for a three-month period could have consequences beyond the audit finding itself, including reduced quality performance positioning, potential reimbursement impact, referral concerns, and reputational damage. The project also aligns with Otterbein's broader commitment to person-centered care by helping ensure that innovative staffing models are documented accurately rather than penalized because they differ from traditional nursing home structures.

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

I plan to keep my sponsor engaged through regular check-ins at key milestones, including initial scope confirmation, methodology development, stakeholder review, pilot testing, and final recommendations. I will provide concise updates that identify progress, barriers, decisions needed, and any emerging risks. I will also use my sponsor as a sounding board when the project requires prioritization, executive alignment, or guidance on how broadly to engage internal and external stakeholders.

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

The process will begin with a review of current CMS PBJ policy, Otterbein's existing reporting practices, Green House model best practices, payroll records, scheduling data, job descriptions, and any prior audit findings or concerns.

Next, I will identify stakeholders who need to be included, such as corporate compliance, clinical leadership, payroll, finance, operations, legal, HR, scheduling leaders, administrators, guides, and Green House location representatives.

I will then develop a draft methodology, test it against sample data, and review whether the supporting documentation would be sufficient in an audit. After internal review, I will refine the methodology, create leader-facing education materials, and outline an implementation plan for all affected locations.

The anticipated timeline is to complete research and stakeholder input first, develop and test the draft methodology next, finalize recommendations after review, and then move into education and implementation planning. Residents are not expected to be directly involved in the technical PBJ methodology, but the project must remain grounded in protecting the resident-centered Green House model and ensuring that compliance activities do not unintentionally disrupt care delivery.

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

Several steps have the potential to reshape or derail the project. The first is interpretation of CMS guidance, because vague or evolving language may limit how confidently a methodology can be defended. This is compounded by the challenge of contacting the PBJ subject matter expert at CMS (or Conrad/Myers & Stauffer).



JENNIFER FEEBACK | OTTERBEIN SENIORLIFE

The second is data quality vs availability, particularly whether payroll, schedule, and task information are detailed enough to support the calculation. Also, finding other Green House model locations may also be a challenge as CMS does not house that data in the available data library.

The third is stakeholder alignment; if operational, clinical, legal, and compliance leaders interpret risk differently, the methodology may need to be adjusted. Finally, if testing shows that the proposed approach is too burdensome for locations to maintain consistently, the project may need to be simplified so that it remains practical and sustainable.

Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

To keep the project grounded and flexible, I will build-in checkpoints for testing, feedback, and recalibration. This will include reviewing sample data, asking stakeholders to challenge assumptions, documenting unresolved questions, and revisiting the goals if the methodology is not producing a clear or defensible outcome. I will also compare the process against the original success measures to ensure the final recommendation is not only technically sound but also usable by the leaders responsible for maintaining it.

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

As a high D and I, this ALP will test both my drive for results and my ability to influence others through change. My “D” style will be an asset because this project requires decisiveness, urgency, problem solving, and the willingness to push through ambiguity to develop a clear and defensible methodology. At the same time, that strength could become a weakness if I move too quickly, become frustrated by vague CMS guidance, or expect alignment before others have had enough time to process the risk and implications. My “I” style will also be valuable because the project requires relationship building, communication, engagement, and the ability to bring different stakeholders into the conversation. However, it may be tested when the work becomes highly technical, slow-moving, or compliance-heavy, because I will need to remain disciplined, detailed, and consistent even when the process is not especially energizing.

From a StrengthsFinder standpoint, I expect my Strategic, Ideation, Arranger, Relator, and Individualization strengths to all be tested in different ways. Strategic will be tested as I evaluate multiple paths forward, weigh compliance risk against operational practicality, and determine which methodology is most defensible. Ideation will be tested because the project may require creative thinking where the regulations are unclear, but I will need to ensure that new ideas remain grounded in evidence and audit expectations. Arranger will be tested as I coordinate moving parts across compliance, clinical operations, payroll, finance, legal, HR, scheduling, and location leadership while keeping the project organized and on track. Relator will be tested because I will need trusted relationships to gain honest input, build alignment, and create confidence in the final approach. Individualization will be tested as I recognize that each location may have different workflows, staffing patterns, and concerns, while still moving the organization toward one consistent standard.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,



Nicole Fischer

Director of Operations- Advanced Practice Providers
At Your Door – National Church Residences

Action Learning Project:

Senior Care Resource Advocacy Team (SCRAT): Supporting
High-Need Older Adults in Senior Living Communities

Description

Purpose: To establish a multidisciplinary team dedicated to identifying, reviewing, and addressing the unmet care needs of vulnerable older adults residing in independent living (IL) and assisted living (AL) communities—particularly those lacking financial resources and/or family advocacy.

The team serves as a centralized vehicle to evaluate high-risk cases and mobilize resources, ensuring that seniors receive the level of care, dignity, and support they need.

Mission Statement

To advocate for the most underserved seniors by identifying gaps in care, coordinating resources, and implementing solutions that enhance safety, well-being, and quality of life—ensuring every older adult has a voice.

Guiding Principles

- Dignity First – Every senior deserves respect and compassionate care.
- Equity in Access – Support those who face financial or social barriers.
- Advocacy for the Voiceless – Prioritize individuals without family or support systems.
- Collaboration – Engage internal and external stakeholders to maximize outcomes.
- Proactive Intervention – Identify risks early and act before crises escalate.
- Ethical Stewardship – Ensure transparency, fairness, and responsible use of resources.

Target Population

Residents in IL of AL who exhibit one or more of the following:

- Increasing clinical or functional care needs
- Financial limitations preventing access to higher-level care
- Lack of family involvement or advocacy
- Cognitive impairment or decision-making limitations
- Social isolation or vulnerability
- Frequent hospitalizations or health instability

What inspired you to choose your ALP?

As the leader of the advanced practice providers, I often hear the discouragement when a provider feels his/her efforts to advise, direct and provide care for residents are unsuccessful due to needing more than they are receiving at that particular level of care. It is an industry wide problem that seniors in IL and AL communities should be in higher levels of care.



NICOLE FISCHER | AT YOUR DOOR – NATIONAL CHURCH RESIDENCES

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

If this structure, through meeting of the minds, can positively impact even one more senior, we will have made a difference.

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

The mission of National Church Residence is to serve 100,000 lives by 2030. I would personally like to add a subgoal that by 2030, we have raised the level of awareness and provided additional support to at least 30 of the identified most critically in need residents.

Core Objectives

Case Identification

- Establish criteria to flag high-risk residents.
- Partner with community staff to refer cases.

Comprehensive Case Review

- Conduct interdisciplinary assessments of medical, social, financial, and environmental factors.

Resource Identification & Coordination

- Identify internal and external support options (clinical services, financial aid, community programs).

Advocacy & Care Planning

- Develop actionable care plans tailored to each resident's needs.

Outcome Monitoring

- Track interventions and resident outcomes to ensure effectiveness.

Key Metrics for Success

- Number of cases reviewed
- Reduction in avoidable hospitalizations
- Increased access to supportive services
- Number of residents able to remain safely in place
- Improvement in resident quality of life indicators
- Engagement of previously unrepresented residents

Case Volume & Reach

- Number of residents referred and reviewed
- Percentage of high-risk residents identified proactively vs. reactively
- Number of communities engaged

2. Resident Outcomes

- Reduction in avoidable hospitalizations or ER visits
- Stabilization or improvement in functional status
- Percentage of residents able to remain in current living setting



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- Improvement in quality of life indicators (where measurable)

3. Access to Resources

- Number of new services or supports implemented per resident
- Number of residents successfully connected to financial assistance or benefits
- Total value of external resources secured (grants, services, subsidies)

4. Advocacy Impact

- Number of residents without family support who receive interventions
- Documented cases where the team prevented neglect, unsafe conditions, or inappropriate discharge

5. Operational Efficiency

- Time from referral to intervention
- Case resolution timelines
- Reduction in crisis-driven escalations

6. Staff and Community Impact

- Staff satisfaction with support for complex residents
- Increased staff confidence in managing high-need cases
- Reduction in moral distress among staff

7. Program Growth & Sustainability

- Expansion to additional communities
- Number of external partnerships established
- Funding secured to sustain or expand the program

How will you measure the success of these goals?

- Quality outcomes
- Resident satisfaction surveys
- Rehospitalization rates
- Sound ACO metrics, where applicable

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

My direct team of APP's is often at the center of the care team and quickly identifies the residents most lacking the support and resources needed to age in place respectfully and keep them out of the hospital.

If successful in the creation and execution of this group that would review these cases and identify resources to close care gaps, these successes would primarily impact the residents well being, but also the spirits of all the care givers.



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

My sponsor is my direct leader. We are in daily contact and it will be very easy to keep her abreast of my efforts while also tapping into her ideas as a professional working in the long term care space for many years.

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

Phase 1: Define the Vision & Scope (Draft included above)

Goal: Establish a clear, aligned foundation before building anything operational.

Key Actions:

- Finalize:
 - Program name
 - Mission and goals
 - Target population (who you will serve first)

Define the core problem statement:

Seniors in IL/AL with increasing care needs lack financial resources and/or advocacy, putting them at risk for poor outcomes.

- Determine initial scope:
 - Pilot vs. enterprise-wide
 - Number of communities involved

Deliverables:

- 1-page program overview
- Executive summary for leadership

Phase 2: Gain Leadership Alignment & Sponsorship

Goal: Secure buy-in, authority, and support.

Key Actions:

- Present:
 - The problem (risk, cost, ethical considerations)
 - Your proposed solution
 - Expected outcomes (clinical + operational + human impact)
- Identify:
 - Executive sponsor
 - Key stakeholders (operations, clinical, finance)

Deliverables:

- Leadership approval
- Identified sponsor/champion

Phase 3: Design the Team Structure

Goal: Define who is involved and how the team operates.



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Key Actions:

- Identify core members:
 - Clinical lead (RN/NP)
 - Social worker/case manager
 - Operations leader
 - Financial/resource specialist
 - Foundation
 - Grant writer
- Define roles and expectations:
 - Who leads meetings
 - Who tracks cases
 - Who executes interventions
- Establish meeting cadence:
 - Weekly or biweekly case review

Deliverables:

- Team roster
- Defined roles & responsibilities

Phase 4: Build the Case Identification & Intake Process

Goal: Ensure the right residents are consistently identified.

Key Actions:

Develop referral criteria, such as:

- Functional decline
- Safety concerns
- Financial hardship
- No family support

Create a simple referral tool/form

- Define who can refer (EDs, nurses, staff, etc.)
- Establish triage guidelines (urgent vs routine)

Deliverables:

- Referral criteria document
- Intake form
- Triage process

Phase 5: Design the Case Review Workflow

Goal: Standardize how cases are evaluated and decisions are made.

Key Actions:

- Define review structure:



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- Case presentation
- Multidisciplinary input
- Risk assessment
- Resource brainstorming
- Action plan creation
- Create documentation templates:
 - Case summary
 - Action plan tracker
- Assign accountability for follow-up

Deliverables:

- Case review agenda template
- Action plan template
- Documentation standards

Phase 6: Develop Resource Network & Tools

Goal: Ensure we have solutions—not just discussions.

Key Actions:

- Identify and compile:
 - Internal resources (clinical support, staffing adjustments)
 - External resources:
 - Medicaid/benefits assistance
 - Community programs
 - Nonprofits
 - Transportation, meals, home health
- Begin building partnerships

Create a resource directory

Deliverables:

- Resource database
- Initial list of partners

Phase 7: Pilot the Program

Goal: Test and refine in a controlled environment.

Key Actions:

- Launch in 1–2 communities
- Start with manageable case volume
- Hold regular case review meetings
- Track:
 - Types of cases
 - Interventions



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- Barriers encountered

Deliverables:

- Pilot case data
- Lessons learned log

Phase 8: Measure, Evaluate, and Refine

Goal: Prove value and improve effectiveness.

Key Actions:

- Track success metrics:
 - Resident outcomes
 - Resource utilization
 - Case resolution timelines
- Gather qualitative feedback:
 - Staff
 - Team members
- Identify:
 - What is working
 - What needs adjustment

Deliverables:

- Pilot evaluation report
- Process improvements
- Report back to Sponsor and SLT

Phase 9: Expand and Scale

Goal: Grow into a sustainable, high-impact program.

Key Actions:

- Refine the model based on pilot results
- Expand to additional communities
- Formalize partnerships and funding sources
- Consider:
 - Dedicated roles
 - Technology tools for tracking

Deliverables:

- Expansion plan
- Standard operating procedures (SOPs)

Suggested Team Participants

Jerrie O'Rourke, Regional Director, Population Health

Wendy Foraker, Portfolio Manager for Enriched Housing



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Support Services Liaison

Grant writer

Foundation Representative

AYD APP or Lead APP

Affordable Housing Service Coordinator representative

Lauren Arnold, Director of Operational Programming

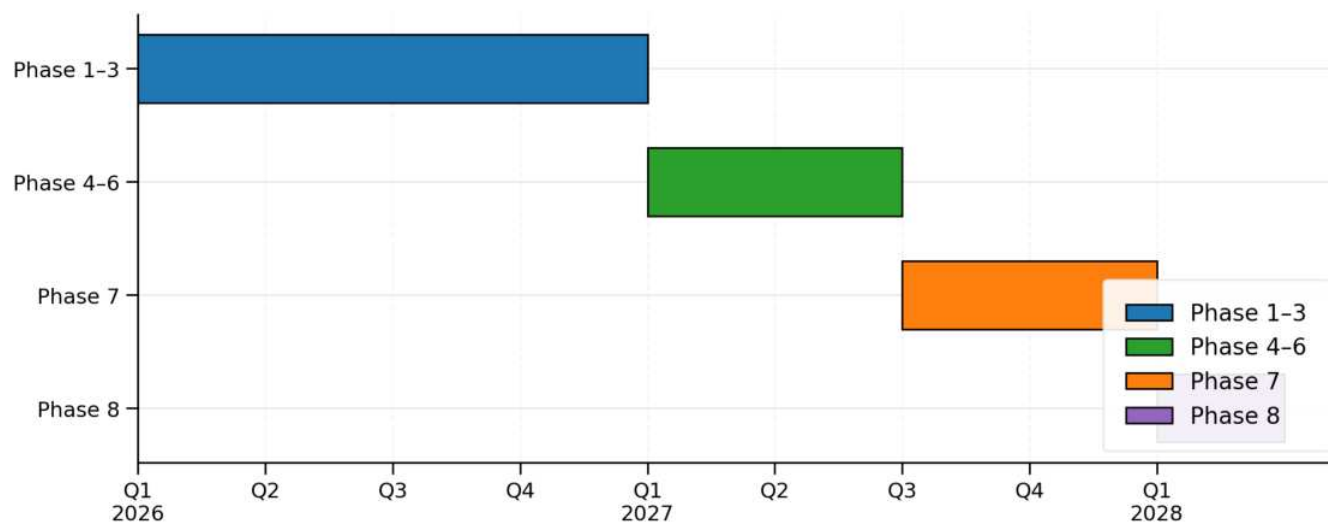
Angie Hoff, VP of Primary Care Services- Sponsor

Chaplaincy

Optional/Advisory Members

- Legal/Ethics Consultant
- Behavioral Health Specialist
- Hospice/Palliative Care Representative
- Community Resource Coordinator

Project Roadmap by Phase





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Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

Although I used AI to help specify risks at each of the above-described process steps, I want to supplement with my personal biases. I feel the two phases that have the greatest impact at impacting success, either negatively or positively, are Phase 1 and 2. Typically, in a not for profit such as National Church Residences, many of our leaders are promoted health care individuals who naturally 'think with their hearts'.

How can this possibly be detrimental to a project like this, success?

Because we want to help EVERYONE.

Secondly, National Church Residences is a very matrixed organization. At times, this leads to natural silos which are very difficult to break down. Worth highlighting, clinicians caring for residents in Affordable Housing communities are commonly felt to have little to no impact with the community leadership (eg Property Managers and Service Coordinators). Do we all have the same expectations? We MUST find a way to remove these felt and/or perceived walls.

I also believe that intentionally selecting some early "easy wins" will positively impact momentum of the team.

Phase 1: Defining Vision & Scope

Risk: Too Broad or Too Vague

- We can't serve everyone immediately
- Lack of clear definition of "high-risk" or "underserved"
- Unclear boundaries between advisory vs. operational team

Impact:

- Confusion
- Inconsistent case selection
- Loss of credibility early

Mitigation:

Start with a narrow, defined pilot population

- Clearly define:
 - "Who qualifies"
 - "What problems we solve"

Document a tight scope for Phase 1

Phase 2: Leadership Alignment

Risk: Superficial Buy-In (Not True Sponsorship)

- Leadership agrees conceptually but:
 - Doesn't allocate time/resources
 - Doesn't reinforce expectations



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- No clear executive champion

Impact:

- Low participation
- Competing priorities take over
- Initiative fades out

Mitigation:

- Secure:

Named executive sponsor

Agreement on why this matters (risk, cost, ethics)

- Position as:
 - Risk mitigation
 - Quality improvement
 - Mission alignment

Phase 3: Team Structure

Risk: Wrong People or Unclear Roles

- Missing key perspectives (especially social work or financial)
- Too many members → inefficient
- No one accountable for action

Impact:

- Meetings become discussion-only
- No follow-through
- Team frustration

Mitigation:

Keep team small and core-focused

- Define:
 - Decision-maker
 - Case owner
 - Follow-up owner
- Avoid “committee creep”

Phase 4: Case Identification Process

Risk: Inconsistent or Overwhelming Referrals

- Too many low-priority referrals
- OR high-risk residents not being flagged
- Staff unsure when to refer



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Impact:

- Team overload or missed critical cases
- Loss of trust in process

Mitigation:

Create clear referral criteria + examples

Use a simple scoring or triage framework

Start with limited intake volume

Phase 5: Case Review Workflow

Risk: Meetings Without Action

- Cases discussed but no decisions made
- No accountability for follow-through
- Lack of documentation

Impact:

- No real impact on residents
- Team disengagement over time

Mitigation:

- Every case must end with:

Action plan

Named owner

Timeline

- Track cases visibly (simple tracker is enough early on)

Phase 6: Resource Network Development

Risk: Identifying Problems Without Solutions

- Team sees needs but lacks resources to respond
- Weak external partnerships

Impact:

- Emotional fatigue (“we can’t actually help”)
- Loss of program credibility

Mitigation:

Build resource list early—even if incomplete

- Focus on:
 - Medicaid pathways
 - Local aging services



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- Nonprofits

Assign someone to own resource development

Phase 7: Pilot Phase

Risk: Trying to Scale Too Fast OR Losing Momentum

- Expanding before refining
- OR pilot loses energy and meetings become inconsistent

Impact:

- Poor outcomes
- Loss of leader confidence

Mitigation:

- Keep pilot:
 - Small
 - Structured

Set fixed cadence (non-negotiable meetings)

- Celebrate early wins to maintain momentum

8. Phase 8: Measurement & Evaluation

Risk: Inability to Prove Impact

- No baseline data
- Metrics too vague or not tracked
- Only anecdotal success

Impact:

- Leadership questions value
- Hard to justify continuation or expansion

Mitigation:

- Track simple metrics from day one:

of cases

of interventions

- key outcomes (stabilized, resources obtained)
- Combine:

Data + storytelling

9. Phase 9: Expansion

Risk: Scaling a Broken or Immature Model

- Expanding before processes are clear



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- Inconsistent execution across communities

Impact:

- Quality drops
- Staff confusion
- Program reputational risk

Mitigation:

- Only scale after:
 - Process is repeatable
 - Roles are clear
 - Early outcomes are positive

Create a simple playbook/SOP

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

With my heavy “I” profile, I may have to be intentional and really focus when it comes to moving from the big picture to the structured day-to-day execution. Too many iterative refinements to processes and I get a little antsy. However establishing clear cut referral guardrails, defined selection criteria etc. will be paramount to the success and sustainability of this work.

Influencing others without having direct authority may also be an area in which I will need to be cognizant. These relationships will highlight competing priorities and timelines. These are real and important variable in which to acknowledge and navigate. I will need to really lean on my Relator, Influencing and Communication skills to highlight how these efforts also positively impact their goals and outcomes.

Additionally, there is very large human, emotionally charge element to this program. We may see cases brought to the committee that have no perfect solution or some that exceed the resources available to us- these factors need to be considered when prioritizing who we can help. Taking some of these emotional factors and treating them as data points will be important as decisions are made.

Emotional resilience will also come into place. There will be times when the ideal can’t be achieved and focusing on small wins or “this is the best possible outcome given difficult constraints” will have to be accepted.

I am naturally somewhat uncomfortable with ambiguity and unclear expectations. The good news is I’m aware of these things and no longer blind to them. However, leading a program that doesn’t have predefined and clear precedents will be something I need to adjust to. The outcomes may take time to truly recognize if we aren’t intentional in our first few cases. We need to define the path to success with some incomplete data. We need to be innovative in this undefined space!

Falling into the trap of discussion vs turning ideas into action will also be a risk area for me. However, I plan to be selective in a couple team members who thrive in this space and can be counted on to keep things moving towards achievable outcomes. I will be stretching my execution, disciple and consistency in this areas.

My final two areas that may be tested would be shifting from my daily work of being a problem solver to a program builder. While I enjoy “truly proactive thinking opportunities”, it is a rarity in my day to day. Last, keeping this program development a priority versus allowing it be something considered “off the side of my desk. I will need to master my advocacy for this project



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in the face of competing priorities. This work may also be more mission driven vs financially driven – this factor alone, at times, may be hard to maintain momentum.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,

How would you like your mentor to support you in your ALP? How do you plan to maintain communication about your ALP with your mentor?

I enjoy a meal with my mentor at least monthly. Historically, I have been careful to speak only in generalities, given she has held a N^^ board seat for 11 years. She is coming off the board this year, so I look forward to sharing my experiences with her in the future! She has never strayed away from asking me hard questions that are intended to make me more effective.



Wendy Foraker

Portfolio Manager for Enriched Housing
National Church Residences (NCR)

Action Learning Project:

One Team, One Structure: Standardizing the Service Coordinator Role Across NCR

Description

- My project is focused on bringing the Service Coordinator role under one standardized structure. Currently, there are two different versions of the program being utilized. The goal is to unify these processes and develop one universal approach to facilitating the Service Coordinator role to improve consistency, efficiency, and role clarity across the program.

What inspired you to choose your ALP?

- I chose this project because of my personal and professional experience with National Church Residences over the past 21 years. I began my career as an intern and worked my way up, including serving as a Service Coordinator in a National Church Residences building at Stygler Village. Through that experience, I gained firsthand knowledge of the role and the challenges Service Coordinators face. Currently, I serve as a Portfolio Manager operating third-party Service Coordinators within our staffing agency at NCR. In this role, I manage day-to-day operations and support Service Coordinators working at contracted sites. Having worked in both environments, I have seen the significant differences between the two programs and understand the challenges and barriers many NCR Service Coordinators experience. Our third-party Service Coordinator program has a strong support structure that includes former Service Coordinators in leadership roles who provide onboarding, coaching, guidance, and intervention when needed. As a result, we experience lower turnover, longer employee retention, and higher overall performance because the right people are placed in the right roles with ongoing support. In comparison, Service Coordinators working directly within NCR buildings operate under a different model of support. Property Managers (PMs) are typically responsible for overseeing the Service Coordinators, but many are already managing multiple responsibilities and may not have the specialized training or background needed to fully support the role. These experiences inspired me to pursue this project because I believe creating one universal structure for all Service Coordinators would improve consistency, strengthen support systems, increase retention, and enhance overall program

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

- The impact I hope to have through this project is creating one universal structure for all Service Coordinators across the organization, including shared job expectations, training, standardized processes, and consistent support systems. I believe this would help unite all Service Coordinators as one team rather than keeping programs separated and causing employees to feel isolated.
- By implementing a dedicated support structure focused specifically on Service Coordinators, the organization would improve recruiting, onboarding, coaching, training, and ongoing performance support, and most importantly, foster better Resident experience. This would increase teamwork, job satisfaction, employee retention, and overall performance because Service Coordinators would feel more supported and better equipped to succeed in their roles.



WENDY FORAKER | NATIONAL CHURCH RESIDENCES (NCR)

- I also believe this project would positively impact resident care. When Service Coordinators remain in their positions longer and receive consistent training, coaching, and support, they can build stronger relationships with residents and provide higher-quality services. In addition, this structure would reduce stress and workload for Property Managers by allowing specialized teams to oversee and support the Service Coordinator role.
- Lastly, this project would help ensure continued compliance with HUD regulations and funding requirements. By creating consistent standards, training, and oversight, the organization could reduce the risk of compliance issues, prevent potential funding loss, and better manage budgetary expectations. A key advantage of this initiative is that many of the best practices needed for success have already been developed and are currently being utilized within our third-party Service Coordinator program. We have established onboarding, training, and support system that has proven effective in preparing Service Coordinators for success, improving performance, and supporting long-term retention. Because this model is already producing positive results, the project is focused on leveraging and expanding these proven practices across all Service Coordinator programs. Overall, this project would strengthen both the Service Coordinator program and the quality of care provided to residents.

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

- My primary goals for this project are to streamline the Service Coordinator role by standardizing job expectations, responsibilities, and program oversight across the organization. I also aim to implement a structured and consistent training and onboarding process for all Service Coordinators, utilizing the best data-driven practices that we have developed, refined, and successfully implemented within our existing third-party Service Coordinator program. These proven practices have been honed over time through experience, performance outcomes, and continuous improvement efforts, and have demonstrated success in supporting Service Coordinators and promoting long-term retention. In addition, I hope to establish a unified support and coaching system that strengthens performance management, improves communication, and provides ongoing professional development. Ultimately, these goals are intended to improve consistency across programs, increase job satisfaction and retention, enhance overall service delivery to residents, and ensure that all Service Coordinators have access to the same level of proven support, training, and resources needed to succeed.

How will you measure the success of these goals?

- Success for this project will be measured using a combination of quantitative and qualitative data. This will include conducting before-and-after surveys to assess Service Coordinator satisfaction, clarity of role expectations, and perceived level of support. In addition, Human Resources data will be used to evaluate changes in vacancy duration for Service Coordinator positions and to track retention rates, specifically how long Service Coordinators remain in their roles after implementation.
- Performance improvement will also be measured through a review of pre- and post-implementation Quality Assurance (QA) scores and documentation results to determine whether consistency and overall performance have improved.
- Moreover, I will seek direct feedback from Service Coordinators, Property Managers (PMs), Regional Portfolio Leaders (RPLs), and Regional Vice Presidents (RVPs) to better understand the impact of the changes from multiple perspectives. Together, these measures will provide a clear picture of whether the project is improving role clarity, retention, performance, and overall program effectiveness.



WENDY FORAKER | NATIONAL CHURCH RESIDENCES (NCR)

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

- This project aligns directly with the organization's priorities because Service Coordinators play a critical role in helping residents remain safely housed with access to appropriate services, supporting the broader goal of aging in place. When Service Coordinators are well-trained, consistently supported, and clearly guided in their roles, they are better equipped to connect residents with needed resources and improve overall outcomes.

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

- Based on conversations with my sponsor, this project also addresses a known and growing organizational concern related to inconsistency, lack of structure, and varying levels of support for Service Coordinators. Both my sponsor and I have seen firsthand the challenges NCR Service Coordinators are experiencing, and this has become an important issue for the organization.
- By creating a standardized structure, this project aims to stabilize and strengthen the Service Coordinator role, providing a clear path for training, support, and performance expectations. This will not only improve the experience and effectiveness of Service Coordinators themselves, but will also positively impact Property Managers, residents, and overall organizational performance. Ultimately, supporting Service Coordinators more effectively will create a ripple effect that strengthens service delivery and aligns with the organization's mission and long-term priorities.
- I will keep my sponsor engaged through weekly meetings, ensuring consistent communication and alignment throughout the project. We already work closely together, so this is a natural extension of our current collaboration. During these meetings, we will discuss updates, trends, challenges, and ongoing needs as they arise. Because many of the foundational elements already exist within our third-party sites, implementation is expected to be an easier transition. We will focus on identifying what is already working and determining how those practices can be effectively transferred and standardized across all Service Coordinator programs.
- We will also share resources, incorporate updates into team meetings and conferences, and maintain regular check-ins to address Service Coordinator questions and concerns in real time. This will be supported by appropriately trained staff who can provide consistent guidance and support.
- My sponsor will play a key role in escalating relevant information, feedback, and recommendations to the senior leadership team, ensuring alignment and visibility at the organizational level while keeping the project moving forward effectively.

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

The project timeline begins with a pilot implementation of a Support Services Liaison position, which is planned to launch mid-to-late summer. This pilot will serve as an initial test of the proposed structure and is intended to demonstrate the desired outcomes in consistency, support, and overall Service Coordinator performance.

This concept has been under consideration for several years, and we are now finally beginning to move in the right direction to bring it to life in a structured and intentional way.

Throughout the pilot period, we will closely monitor results, gather feedback, and evaluate the effectiveness of the role in strengthening onboarding, coaching, and day-to-day support for Service Coordinators. The expectation is that this pilot will provide clear evidence of impact and help guide future scaling decisions.

The Support Services Liaison will report to the Portfolio Manager for Enriched Housing.



WENDY FORAKER | NATIONAL CHURCH RESIDENCES (NCR)

Key Performance Indicators:

- Position be filled in 60 days; SC completes onboarding in 30 days
- 100% of SC are completely trained at onboarding. Tracks all new SC initial onboarding, setting up schedule for oversight and support calls weekly and progressing to monthly after 90 days.
- Conduct monthly coaching sessions, partnering with Support Services when needed
- Tracks all annual HUD annual training and NCR education plan
- Lead department specific post survey and report out on metrics such as onboarding
- i.e. 88% satisfied or extremely satisfied with onboarding
- Ensure all Housing sites have Support Services Plans in place, and revised every 2 years
- Ensure CORES certification remains active and leads designated sites annual compliance
- Monthly documentation and reports on all activities, recommendations and barriers
- Resident Satisfaction Survey results for SC will be 90% satisfaction rate or noting 10% improvement from baseline
- Turnover rate and retention of SC will be improved (will need to identify a %)
- Ensure that 80% of eligible residents are engaged with Service Coordination
- Using ticket system, answer all relevant tickets within 48 hours, full resolution within 30 days or less (depending on situation)
- Establish 5 new community partnerships annually support SC programming and resident engagement
- SC on critical list will be less than 10% first year, 5% subsequent years

If the pilot is successful and demonstrates the expected results outlined by the KPI's, the next phase would involve expanding this model by introducing additional Support Services Liaison positions or incorporating formal supervisory roles into building budgets over the next 3–5 years.

A critical factor for long-term success will be securing alignment and support from the Senior Leadership Team, as their buy-in will be essential for scaling the model across the organization and integrating it into broader operational planning and budgeting processes.

Which of the steps you've described in the process description above have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

- Some potential challenges I may experience along the way include the need to deepen my understanding of the day-to-day operations within NCR buildings. This will involve building strong working knowledge of each site, as well as developing relationships with PMs, RPLs, and RVPs to ensure alignment and effective collaboration.
- In the early stages, I anticipate there may be some resistance, confusion, or uncertainty as the new structure is introduced. Change management will likely be a key challenge, especially as teams adjust to a more standardized and centralized approach to Service Coordinator support.
- However, I believe that once the structure is fully implemented and its benefits become clear, many of these barriers will decrease over time. To help navigate these challenges, I plan to rely heavily on my sponsor, as well as support from the VP of Affordable Housing, to ensure strong leadership alignment and consistent messaging throughout the organization.



WENDY FORAKER | NATIONAL CHURCH RESIDENCES (NCR)

- I will also be able to reflect on outcomes and learn through continual check-ins with my sponsor, as well as with PMs, RPLs, and RVPs. In addition, data from HR regarding turnover and vacancy rates, along with Quality Assurance performance reports, will provide clear, measurable indicators of impact and help guide ongoing improvements. I would also welcome ongoing feedback throughout the process and remain flexible in adjusting as needed to ensure the success of the project.

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

- I plan to use several leadership strengths throughout this project, as each will play an important role in its success and in building strong relationships across the organization. A key focus will be my ability to understand and connect with people individually, taking the time to learn how each person communicates, thinks, and works best.
- I also plan to use tools such as DISC to better understand team dynamics and communication styles. This will help both myself and the supervisors develop stronger relationships with Service Coordinators and tailor support in a way that aligns with individual needs and preferences. In addition, I would incorporate StrengthsFinder to help identify each team member's natural talents, allowing us to better leverage individual strengths and place people in roles where they can be most effective.

How would you like your mentor to support you in your ALP? How do you plan to maintain communication about your ALP with your mentor?

- I feel very connected to and supported by my mentor. We both understand the current challenges and agree that if this project is fully implemented, it has the potential to significantly strengthen the organization in multiple ways. We meet regularly and maintain open, honest communication where we discuss both successes and challenges. I rely on her feedback, insight, and organizational connections to help move the project forward and ensure alignment across leadership levels. We also collaborate closely in reviewing relevant data and trends together, which help guide decision-making and keeps the project grounded in measurable outcomes. In addition, my mentor plays a key role in helping elevate information and recommendations to senior leadership, ensuring the project maintains visibility and support at the appropriate levels of the organization.



Mario J. Fusillo

Controller

Angel Care Medical LLC

Action Learning Project:

Connected Care Partnership Initiative - Building a Collaborative Model for Post-Acute Care Excellence.

Description

The Connected Care Partnership Initiative is a leadership project designed to improve collaboration, communication, and operational efficiency between long-term care facilities, hospice organizations, and durable medical equipment (DME) providers.

Today, these three groups often operate independently despite sharing responsibility for the same residents. The lack of standardized communication can lead to delays in care, equipment tracking issues, billing disputes, duplicate work, and increased administrative burden.

This project will develop a collaborative partnership model that establishes standardized communication pathways, clearly defined responsibilities, regular performance reviews, educational resources, and measurable operational metrics. The objective is to create a repeatable framework that strengthens relationships between providers while improving resident care, operational efficiency, and financial performance for all organizations involved.

What inspired you to choose your ALP?

Throughout my career in long-term care, I have observed that many operational challenges stem from communication gaps rather than clinical or financial shortcomings. Whether it involves delayed equipment orders, uncertainty regarding equipment ownership, billing disputes, or coordination between hospice and facility staff, the underlying issue is often the absence of a standardized process.

As Controller for Angel Care Medical, I have a unique perspective that allows me to see the financial, operational, and customer service impacts of these communication challenges. Rather than simply addressing problems as they occur, I want to develop a proactive partnership model that prevents them from happening in the first place.

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

This initiative has the potential to improve not only Angel Care Medical's operations but also the experience of long-term care facilities, hospice organizations, clinicians, residents, and family members.

Improved communication can reduce unnecessary delays, improve equipment accountability, strengthen relationships between providers, decrease administrative burden, and ultimately allow caregivers to spend more time focusing on resident care. If successful, the framework could serve as a model for collaboration between DME suppliers and post-acute care providers throughout Ohio.



MARIO J. FUSILLO | ANGEL CARE MEDICAL LLC

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

- Develop a standardized communication model.
- Improve equipment accountability.
- Reduce billing disputes.
- Improve customer satisfaction.
- Create measurable KPIs.
- Increase collaboration with hospice partners.
- Build an implementation guide that can be replicated with future customers.

How will you measure the success of these goals?

Operational

Equipment recovery %

Delivery turnaround time

Billing dispute frequency

Average AR days

Lost equipment

Customer

Facility satisfaction survey

Hospice satisfaction survey

Administrator interviews

Financial

Reduction in write-offs

Reduction in aging AR

Reduction in replacement costs

Relationship

Quarterly partnership meetings completed

Education participation

Stakeholder engagement



MARIO J. FUSILLO | ANGEL CARE MEDICAL LLC

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

My sponsor and I envision this project as a strategic initiative that supports Angel Care Medical's long-term commitment to exceptional customer service, operational excellence, and sustainable growth. As our organization continues to expand throughout Ohio, it is increasingly important that we develop standardized processes that strengthen communication with our facility and hospice partners.

This initiative aligns with our organizational priorities by improving collaboration, reducing operational inefficiencies, enhancing customer satisfaction, and strengthening long-term partnerships. It also supports our mission of delivering timely, dependable medical equipment and services while allowing our customers to focus on providing exceptional resident care. From a financial perspective, improved communication and standardized workflows are expected to reduce billing disputes, improve equipment accountability, decrease unnecessary operational costs, and strengthen overall organizational performance.

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

I plan to meet with my sponsor regularly throughout the project to provide progress updates, discuss challenges, review performance metrics, and seek strategic guidance. These meetings will ensure the project remains aligned with organizational priorities while allowing adjustments to be made as new opportunities or obstacles emerge.

In addition to scheduled meetings, I will provide milestone summaries highlighting completed objectives, stakeholder feedback, measurable outcomes, and recommendations for next steps. My goal is to make my sponsor an active strategic advisor rather than simply someone who receives periodic updates.

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

The project will begin with an assessment of current workflows, communication practices, and operational challenges across Angel Care Medical, long-term care facilities, and hospice organizations. I will conduct interviews with internal leadership, customer service representatives, respiratory therapists, service technicians, billing personnel, facility administrators, Directors of Nursing, hospice leadership, and other key stakeholders to better understand existing barriers and opportunities.

Using the information gathered, I will develop standardized communication processes, educational resources, operational metrics, and partnership expectations. Following leadership review, the initiative will be piloted with a small number of facility and hospice partners before broader implementation. Throughout each phase, stakeholder feedback will be incorporated to refine the process and ensure the model remains practical, measurable, and sustainable.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

The most significant risk is stakeholder engagement. Each participating organization has different priorities, workflows, staffing challenges, and operational expectations. It is likely that feedback gathered during interviews and pilot implementation will reshape portions of the project.



MARIO J. FUSILLO | ANGEL CARE MEDICAL LLC

Rather than viewing these changes as setbacks, I intend to treat them as opportunities to improve the initiative. Action learning is built upon continuous reflection, and I expect the project to evolve as participants contribute ideas and identify unforeseen challenges.

To ensure continuous improvement, I will schedule regular review meetings with project stakeholders, monitor established performance metrics, solicit structured feedback, and periodically reassess project goals to ensure they continue meeting organizational needs.

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

My greatest strengths are analytical problem-solving, strategic thinking, relationship building, and process improvement. These strengths have helped me identify opportunities to improve financial performance and operational efficiency throughout my career.

This project will challenge me to rely less on technical problem-solving and more on influencing others who do not report directly to me. Success will depend upon collaboration, active listening, adaptability, and the ability to build consensus among individuals with different priorities and perspectives.

I also anticipate strengthening my ability to lead organizational change by facilitating discussions, managing differing viewpoints, encouraging participation, and maintaining momentum throughout a long-term initiative. These leadership competencies are essential for my continued professional growth.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,

How would you like your mentor to support you in your ALP? How do you plan to maintain communication about your ALP with your mentor?

I plan to utilize my mentor as a strategic sounding board throughout the project. Their experience leading organizational change will provide valuable perspective as I navigate stakeholder engagement, project implementation, and decision-making.

I intend to provide periodic project updates, discuss challenges and key decisions, seek feedback on leadership approaches, and evaluate opportunities for continuous improvement. Maintaining regular communication with my mentor will help ensure I remain focused on both the project's objectives and my own leadership development.



Tracy Irwin

VP Sales & Marketing
Heritage Pointe

Action Learning Project:

Aging Well Initiative- Empowering Residents to live independently, purposefully, and safely.

Description

As older adults continue to seek opportunities to remain independent longer, senior living organizations must redefine their role from simply providing housing to becoming a partner in successful aging.

The Heritage Pointe Aging Well Initiative will create a comprehensive framework designed to support residents across the Eight Dimensions of Wellness while providing resources, services, and technology solutions that promote independence, connection, safety, and peace of mind.

The initiative will include:

- A preferred provider network
- Concierge wellness navigation
- Educational opportunities
- Volunteer engagement opportunities
- Heritage Pointe Meals on Wheels
- Enhanced resident communication tools
- Daily wellness check-in options
- Technology solutions to support independence and safety

The goal is to create a proactive approach that helps residents maintain their independence while providing reassurance to residents, families, and Heritage Pointe that residents remain connected and supported.

What inspired you to choose your ALP?

During the Leadership Academy, visiting other senior living organizations challenged my thinking about what is possible in Independent Living. Seeing innovative approaches being implemented in other communities made me realize that we have an opportunity—and a responsibility—to think differently about how we support our residents as they age.

The visits reinforced for me that aging well should be about much more than providing a place to live. It should be about creating an environment that enables residents to remain independent, connected, purposeful, healthy, and engaged for as long as possible.

Rather than waiting until a resident needs additional care or experiences a crisis, I want Heritage Pointe to become more proactive in helping residents navigate the natural changes that occur as they age.



TRACY IRWIN | HERITAGE POINTE

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

Independent Living residents choose senior living because they want the benefits of community, convenience, and security while maintaining control over their daily lives. However, as residents age, their needs naturally evolve.

Currently, residents may have to independently search for services, coordinate support, or communicate needs as they arise. This creates opportunities for Heritage Pointe to become more proactive by creating a structured Aging Well approach.

By developing a comprehensive wellness and support system, Heritage Pointe can help residents:

- Maintain independence longer
- Stay connected to their community
- Access resources before a crisis occurs
- Improve quality of life
- Feel confident that support is available when needed

This initiative supports Heritage Pointe's mission of providing a vibrant, purposeful living environment where residents can experience joyful living at every stage of aging.

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

- Promotes healthy aging
- Encourages independence
- Connects residents with trusted resources
- Supports successful aging in place
- Improves overall wellness
- Enhances resident satisfaction
- Strengthens community engagement

How will you measure the success of these goals?

Resident Outcomes

- Resident satisfaction scores
- Participation rates
- Number of concierge referrals
- Number of provider referrals
- Volunteer participation
- Educational attendance

Operational Outcomes

- Preferred provider utilization
- Meals delivered



TRACY IRWIN | HERITAGE POINTE

- Concierge interactions
- Wellness program participation
- Number of partnerships established

Strategic Outcomes

- Resident retention
- Increased Independent Living occupancy
- Increased resident engagement
- Delayed transitions to higher levels of care
- Improved quality of life

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

- Improved resident retention
- Increased Independent Living occupancy
- Stronger market differentiation
- Improved resident and family confidence

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

We are meeting every other week to discuss the progress, any challenges, and if we need to change or pivot.

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

Stakeholders Internal

- Executive Leadership Team
- Executive Directors
- Independent Living Concierge Team
- Dining Services
- Wellness/Activities
- Marketing
- Information Technology

Stakeholders External

- Residents & Families
- Technology Vendors, Preferred Providers, Community Organizations

High-Level Timeline

Phase 1: Discovery

- Resident surveys, Focus groups, Identify current gaps, Research best practices



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Phase 2: Design

- Develop provider standards, Create Aging Well framework, Recruit providers, Design concierge workflow

Phase 3: Pilot

Launch:

- Preferred Provider Network, Heritage Pointe Meals on Wheels, Concierge Navigation Services, Monthly Education Series

Phase 4: Evaluation

Measure:

- Resident participation, Satisfaction, Provider utilization, Wellness outcomes

Phase 5: Expansion

Continue adding:

- New partnerships, Additional wellness programming, Technology support, Preventive health initiatives

Which of the steps you've described in the process description above have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

- Identifying quality providers
- Maintaining consistent service standards
- Resident awareness
- Encouraging participation
- Coordinating multiple departments
- Measuring outcomes
- Sustainability
- Budget considerations

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

My personal leadership goal through this Action Learning Project is to strengthen my ability to lead innovation through influence rather than ownership. I want to use my strengths of Responsibility, Arranger, Achiever, Context, and Belief to create momentum while intentionally developing my ability to listen, facilitate, delegate, and engage others in creating the solution.



TRACY IRWIN | HERITAGE POINTE

How would you like your mentor to support you in your ALP? How do you plan to maintain communication about your ALP with your mentor?

I greatly appreciate having a mentor who has always been available to me when I have needed guidance, perspective, or simply someone to talk through an idea with. Knowing that I have someone I can reach out to has been incredibly valuable throughout this experience. I hope our relationship continues well beyond the Leadership Academy and that, even years from now, we will continue to stay connected and find ways to support and learn from one another. Senior living is an ever-changing field, and I value having someone in the industry who I can turn to, share ideas with, and continue to grow alongside. I hope our relationship becomes one where we can continue to challenge, encourage, and support each other throughout our leadership journeys.



Laurinda Johnson

Communications & Membership Coordinator
LeadingAge Ohio

Action Learning Project:

Culture Club 2027: Staff Engagement, Recognition, and Growth

Description

My Action Learning Passion Project is to develop and launch Culture Club 2027, a yearlong staff engagement and recognition initiative for LeadingAge Ohio. The project will create a framework for monthly staff engagement activities, staff recognition, a Kudos Board, professional growth opportunities, and simple ways to acknowledge birthdays, work anniversaries, team contributions, and new staff joining the organization.

A key part of this project is that Culture Club 2027 will not be planned entirely by one person. While I am developing the initial structure and planning the first activities of the year, several months have intentionally been left open. This is because an important part of the project will be creating a small staff Culture Club to help plan, recommend, and support monthly staff engagement activities throughout the year.

The first few activities will help establish the purpose and tone of the project. In January, staff will participate in a SMART goals and professional resolutions activity, paired with affirmation cards and a Proof of Progress gift that helps staff track small wins throughout the year. In February, staff will launch a Kudos Board through a Valentine's Day-themed card exchange, then transition to an ongoing digital kudos process through a Microsoft Form.

Culture Club 2027 will also include a staff book club centered on leadership and professional growth, beginning with books such as StrengthsFinder, Emotional Intelligence 2.0, Switch, Leaders Eat Last, and Smart Brevity. The project will also formalize simple recognition practices for staff birthdays and work anniversaries, including cards, favorite desserts, LeadingAge Ohio swag, and supervisor notes.

Another important component will be creating a new staff welcome process. This will include not only a new employee getting-to-know-you form, but also a simple procedure to help new staff feel welcomed from the start. The process may include introducing the new staff member during a staff meeting, sharing a few fun facts if they are comfortable, preparing a welcome card from the team, and providing a small LeadingAge Ohio welcome gift such as a mug or tumbler, notebook, pen, favorite snack or drink, or another simple item that helps them feel included early in their time with the organization.

What inspired you to choose your ALP?

I chose this project because I wanted to create something that would have a positive, practical impact on the staff experience at LeadingAge Ohio. In my role, I often support communications, member engagement, events, networks, and internal projects that require collaboration across the organization. That work has shown me how much people contribute behind the scenes and how easy it can be for those efforts to go unnoticed during busy seasons.



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This project is also a good fit for the way I naturally work. I enjoy creating systems, organizing ideas, building thoughtful experiences, and turning a broad concept into something people can actually use. Culture Club 2027 allows me to combine communications, project planning, creativity, and staff engagement in a way that supports the organization internally.

The idea was also inspired by the Leadership Academy's focus on leadership, teams, change, innovation, and partnerships. I wanted my ALP to reflect those themes by creating a sustainable staff culture project that encourages professional reflection, recognition, shared planning, a welcoming environment for new staff, and ongoing learning throughout the year.

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

I hope Culture Club 2027 helps staff feel more seen, appreciated, and engaged in the work they do every day. The intended impact is not only to create enjoyable staff meeting activities, but to build simple habits that make recognition and professional growth more visible across the organization.

For staff, I hope the project creates more opportunities to pause, reflect, and recognize one another. The Kudos Board will give staff a structured way to recognize coworkers who help colleagues, go above and beyond, demonstrate empathy, contribute new ideas, solve problems, or create a positive impact in the workplace. Reading kudos during staff meetings and displaying them in the kitchen area will help make those contributions visible beyond a single moment.

For the organization, I hope this project supports morale, retention, and internal teamwork. When staff feel appreciated and better understand one another's strengths, it can improve the way we work together and, in turn, the way we serve members. The book club and monthly activities will also support ongoing learning and give staff shared language around leadership, communication, change, and professional growth.

I also hope the project improves the experience of new staff joining the organization. A consistent welcome process can help new employees feel included earlier, give current staff easy ways to learn about new colleagues, and create a stronger sense of belonging from the start.

Finally, I hope the staff Culture Club creates shared ownership of internal culture. By leaving some monthly activities intentionally blank and inviting staff to help plan future activities, the project can be more responsive to staff interests and less dependent on one person's ideas or capacity.

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

The first goal is to create the foundation for Culture Club 2027, including the overall purpose, structure, early-year activities, materials, budgets, timing, and recognition processes.

The second goal is to form a small staff Culture Club that can help plan and support monthly engagement activities throughout the year. Rather than pre-planning every month before the project begins, some activities will be intentionally left open so staff have an opportunity to contribute ideas and help guide the direction of the project.

The third goal is to launch a Kudos Board and digital kudos process so staff have an easy, consistent way to recognize coworkers for collaboration, innovation, empathy, leadership, encouragement, problem-solving, service to members, and other positive contributions. This will include a Microsoft Form, a physical board in the kitchen area, monthly staff meeting recognition, and gift card incentives for the person who receives the most kudos and the person who gives the most kudos each month.



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The fourth goal is to support professional growth through a staff book club, beginning with leadership and communication-focused books such as StrengthsFinder, Emotional Intelligence 2.0, Switch, Leaders Eat Last, and Smart Brevity.

The fifth goal is to formalize staff recognition practices for birthdays and work anniversaries so those moments are acknowledged consistently and thoughtfully throughout the year.

The sixth goal is to create a simple new staff welcome process so employees feel included and recognized from the beginning of their time with LeadingAge Ohio. This may include a new employee getting-to-know-you form, a welcome card or team note, a small LeadingAge Ohio gift, and a procedure for introducing new staff during a staff meeting.

How will you measure the success of these goals?

I plan to measure success through both participation data and staff feedback. Participation data may include the number of monthly activities completed, the number of staff who participate in each activity, the number of kudos submitted each month, the number of unique staff members giving and receiving kudos, the number of staff participating in the book club, the number of birthday and work anniversary recognitions completed, and the number of new staff welcome activities completed.

I would also like to gather staff feedback before and after the project launches. A short baseline survey could ask staff how often they feel recognized, how comfortable they feel recognizing coworkers, whether staff meeting activities feel meaningful, and what types of professional development, recognition, or welcome activities would be most helpful. A follow-up survey later in the year could measure whether Culture Club 2027 is making a difference in staff morale, appreciation, engagement, and sense of belonging.

For the new staff welcome component, success could also be measured through informal check-ins or a short new employee feedback form after the welcome process has been used. That feedback could help determine whether the getting-to-know-you form, staff meeting introduction, welcome card, and LeadingAge Ohio gift made the new staff member feel welcomed and included.

Success will also be measured by whether the project is sustainable. If the activities are too complicated, too expensive, or too time-consuming, they may not continue. A successful project will be one that feels thoughtful but realistic, supports staff without creating unnecessary burden, and can be adapted based on feedback throughout the year.

Another measure of success will be whether the staff Culture Club becomes an active part of the planning process. The project will be more successful if staff are willing to contribute ideas, help select future activities, and participate in keeping the initiative moving throughout the year.

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

My sponsor and I envision Culture Club 2027 aligning with LeadingAge Ohio's need to support staff morale, internal collaboration, recognition, professional development, and retention. As a mission-driven membership association, LeadingAge Ohio depends on staff working well together across departments, programs, events, communications, advocacy, and member support. This project supports that need by creating simple, repeatable ways for staff to recognize one another, learn together, welcome new colleagues, and build stronger internal relationships.



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The project also aligns with the organization's need for practical, sustainable systems. Rather than creating one-time activities that disappear after a staff meeting, Culture Club 2027 creates a structure for yearlong engagement. The Kudos Board, book club, staff welcome process, birthday and work anniversary recognition, and monthly activities can be adapted over time based on staff feedback and capacity.

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

I plan to keep my sponsor engaged by sharing the Culture Club 2027 spreadsheet, early activity plans, proposed budgets, the Kudos Form, the new staff welcome process, and staff feedback as the project develops. I will seek feedback before key pieces are finalized so the project continues to align with organizational priorities and remains realistic for staff time and resources.

I will also provide updates at key milestones, including finalizing the January and February activities, forming the staff Culture Club, launching the Kudos Board, preparing the new employee welcome procedure, and reviewing early participation data. These updates will help my sponsor see how the project is progressing and where feedback or approval may be needed.

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

The first phase of the project is planning the foundation for Culture Club 2027. This includes creating the project spreadsheet, identifying the purpose of the initiative, outlining recognition practices, estimating budgets, preparing the first few staff meeting activities, outlining the new staff welcome process, and determining which months should remain open for future planning.

The second phase will be forming a small staff Culture Club. This group will help develop ideas for future monthly engagement activities, review what has worked well, suggest improvements, and help make sure the activities reflect staff interests rather than only one person's ideas. This phase is important because the project is intended to build shared ownership over staff culture and recognition.

The third phase will be preparation. This will include finalizing the January and February activities, creating the SMART goals handout, designing or purchasing affirmation cards, preparing Proof of Progress materials, creating the Microsoft Form for kudos submissions, developing the QR code and form instructions, preparing the physical Kudos Board, and drafting the new employee getting-to-know-you form and welcome procedure.

The fourth phase will be launch and early implementation. In January 2027, staff will complete the SMART goals and professional resolutions activity and receive their affirmation card and Proof of Progress gift. In February 2027, staff will launch the Kudos Board through a Valentine's Day-themed kudos card exchange and learn how to use the digital Microsoft Form for ongoing kudos submissions.

The fifth phase will be ongoing planning and implementation. Each month, kudos will be collected, shared during staff meetings, printed, and added to the physical Kudos Board. The staff Culture Club will help plan future activities, and intentionally blank months in the spreadsheet will be filled in as the group identifies ideas that are realistic, useful, and meaningful for staff. New staff welcome practices will also be used whenever a new employee joins the organization.

The final phase will be reflection and adjustment. I will track participation, gather feedback, and review what should continue, change, or be simplified. This will help determine whether Culture Club 2027 can become a sustainable part of LeadingAge Ohio's internal staff engagement efforts.



LAURINDA JOHNSON | LEADINGAGE OHIO

The people likely involved include Susan Wallace, staff leadership, all LeadingAge Ohio staff, supervisors for work anniversary recognition, members of the staff Culture Club, any staff who participate in the book club or monthly activities, and new employees who experience the welcome process. I will also involve my mentor for feedback, problem-solving, and accountability as the project develops.

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

One challenge will be keeping the project sustainable. It is easy for a culture project to become too large or too complicated, especially when it includes monthly activities, a book club, kudos tracking, birthdays, anniversaries, new staff onboarding, materials, and incentives. I will need to keep the project organized and realistic so it supports staff rather than creating extra work that becomes difficult to maintain.

Another challenge will be balancing structure with staff ownership. I want the project to have enough planning in place to be successful, but I also do not want to over-plan the entire year before staff have a chance to participate. Leaving some months intentionally blank may feel unfinished at first, but it is an intentional part of the process. The goal is to create a framework that invites staff input and allows the Culture Club to help plan activities that feel relevant and realistic throughout the year.

Another challenge will be participation. Staff may have different comfort levels with activities, recognition, group sharing, and welcome activities. The project will need to leave room for people to participate in ways that feel comfortable. For example, the January resolutions activity allows staff to share only if they want to, and the new staff welcome process should only share fun facts or personal preferences that the new employee is comfortable sharing.

A third challenge is making sure the Kudos Board does not become a popularity contest or feel forced. The monthly incentives are meant to encourage participation, but the kudos themselves need to remain meaningful. The form should ask for a specific action, contribution, or positive impact so the recognition stays grounded in real examples.

Another challenge will be maintaining consistency with the new staff welcome process. Because new employees may start at different times throughout the year, the process needs to be simple enough to use whenever it is needed. It should feel warm and personal, but not so complicated that it is difficult to repeat.

Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

I will build reflection into the project through monthly review and staff feedback. After each activity, I can make note of what worked, what felt unclear, how much time it took, and what should be changed before the next month. I can also track participation in the spreadsheet so I have a simple record of activity completion, kudos submissions, book club participation, recognition efforts, and new staff welcome activities.

I also plan to test assumptions as the project moves forward. For example, I may assume staff will use the Kudos Form regularly, but participation data may show that reminders, a simpler form, or a more visible QR code are needed. I may assume monthly activities can fit into 15 to 20 minutes, but staff meeting agendas may require some activities to be shortened or moved. I may also assume the welcome process is helpful, but feedback from new employees may show that certain parts should be changed or simplified.



LAURINDA JOHNSON | LEADINGAGE OHIO

The staff Culture Club will also help build reflection into the project. The group can discuss what staff responded to, what felt useful, what needs to be adjusted, and what ideas should be considered for future months. This will help keep the project from becoming static or disconnected from staff needs.

I will revisit goals as needed and treat the project as something that can be adjusted. If one part of Culture Club 2027 becomes especially valuable, I may place more emphasis there. If another part is not working, I can simplify it. I will also use mentor feedback, sponsor feedback, and staff feedback to reassess how I measure success.

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

As someone with an IDC DISC style, I bring strengths in communication, relationship-building, energy, decisiveness, and attention to quality. Those strengths are a good fit for Culture Club 2027 because the project requires clear communication, enthusiasm, organization, and the ability to move ideas into action.

This project will also test each part of that leadership style. The influence side of my style will be stretched because I will need to invite participation in a way that feels genuine and inclusive, not forced. I will need to communicate the purpose clearly, encourage staff input, and create activities that people actually want to participate in while respecting different comfort levels.

The dominance side of my style will be tested because I like to move projects forward and make decisions. Culture Club 2027 will require me to balance that drive with patience, listening, and shared planning. Because an important part of the project is forming a staff Culture Club, I will need to create enough structure for the group to be productive while leaving real room for other people's ideas and feedback.

The conscientiousness side of my style will be tested through the details of implementation. I will need to keep the project organized, track budgets and materials, monitor participation, maintain the Kudos process, and make sure the new staff welcome procedure is clear and repeatable. At the same time, I will need to avoid overbuilding the project or making it so detailed that it becomes difficult to sustain.

Overall, this ALP will help me grow by asking me to lead through planning, communication, facilitation, flexibility, and follow-through. It will challenge me to balance creativity with practicality and to build a project that is thoughtful, staff-informed, and realistic for the organization to continue.

10. OPTIONAL: If you plan to incorporate your mentor in your ALP process,

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

I would like my mentor to serve as a thought partner as I develop and refine Culture Club 2027. Specifically, I would appreciate feedback on scope, sustainability, staff participation, and how to measure success in a way that is useful without becoming overly complicated.

I would also value my mentor's help in thinking through potential challenges, especially around participation, incentives, shared planning, the new staff welcome process, and keeping the Kudos Board meaningful. Since the project involves culture, recognition, and staff engagement, it would be helpful to have another perspective on what may work well, what may need to be simplified, and how to communicate the purpose of the project clearly.

I would also like support in thinking through how to form and use the staff Culture Club effectively. I want the group to have a meaningful role in planning future activities without making the process feel burdensome or unclear.

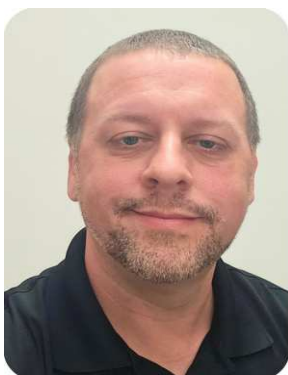


LAURINDA JOHNSON | LEADINGAGE OHIO

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

I plan to stay in touch with my mentor through regular check-ins during the planning and implementation process. I can share updates on the Culture Club 2027 spreadsheet, draft activities, the Kudos Form, the new staff welcome process, and the measurement plan as the project develops.

I would like to use mentor check-ins to talk through progress, decisions, and any challenges that come up. A practical communication plan would be to provide a brief update before or after each Leadership Academy session, along with additional email updates when I reach key milestones such as finalizing the early-year activities, forming the staff Culture Club, launching the January activity, launching the Kudos Board, preparing the new staff welcome procedure, and reviewing early participation data.



Shawn Kiser

Director of IT

Westerwood (Friendship Village of Columbus LLC)

Action Learning Project:

Campus Infrastructure Modernization & Staff Communication Enhancement

Description

Westerwood is a senior living campus in Columbus, Ohio with three care settings: Independent Living (IL), Assisted Living (AL), and Skilled Nursing/Rehabilitation (SNF/Rehab). This ALP covers two connected projects I've been driving as Director of IT.

Phase 1: Campus Network Modernization:

We're replacing our aging Meraki wireless infrastructure with a Ubiquiti UniFi platform across the entire campus. That means around 170 access points, new switches, fiber backbone runs, and a UniFi controller. We're also moving staff devices off the shared password Wi-Fi and onto WPA3-Enterprise with Active Directory authentication. This is already in progress.

Phase 2: Vocera Staff Communication Deployment:

Once the network is solid, we're deploying Vocera badges (a Stryker product) to replace walkie-talkies with encrypted, hands-free Wi-Fi communication. The badges will tie into our Jeron Provider 680 and Ascom nurse call systems so staff can respond to alerts and communicate without stepping away from a resident. We've already done the demo and made the call to move forward. Target is full deployment by end of 2026.

What inspired you to choose your ALP?

Honestly, this project grew out of frustration. Our wireless infrastructure was old, spotty in certain parts of the building, and causing real headaches for staff trying to use PointClickCare or other clinical tools. Walkie-talkies were the other piece they're loud, they have no privacy, and they don't belong in a care environment where you're trying to maintain dignity and calm for residents.

I'd watch a nurse step out of a resident's room to call someone on a walkie-talkie, or have a staff member come to me frustrated because they couldn't pull up a chart in the hallway. These aren't IT problems in isolation they're care quality problems. I knew fixing the network and the communication tools would have a real impact on how staff do their jobs and how residents experience their day.

The Leadership Academy pushed me to think about this differently than I normally would as an IT guy. It's not just about deploying equipment it's about bringing people along, making the case to leadership, and connecting technology decisions to what actually matters to the organization.

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

The impact of this project touches all three care settings and goes beyond just better Wi-Fi:



SHAWN KISER | WESTERWOOD (FRIENDSHIP VILLAGE OF COLUMBUS LLC)

- Staff will have reliable Wi-Fi coverage everywhere on campus, which means fewer dropped connections in PointClickCare, less frustration, less workaround.
- Getting rid of walkie-talkies means quieter hallways and resident spaces something families notice and residents appreciate.
- Vocera lets nurses respond to call alerts and talk to each other without leaving the room better for residents and better for care workflows.
- Moving to enterprise Wi-Fi authentication closes a real security gap we've had and supports our HIPAA and HITRUST compliance posture.
- A modern, standards-based network gives us a better foundation for whatever comes next new clinical tools, IoT devices, resident tech without being locked into a single vendor.

I also think there's something worth sharing with peers in the field. Senior living organizations with small IT teams can take on projects like this it just takes planning, the right partnerships, and leadership buy-in.

What are the goals for your organization and/or greater community or field?

- Finish the Meraki-to-UniFi cutover across all three care settings by Q3 2026 without any unplanned downtime during the transition.
- Get Vocera fully deployed to SNF/Rehab and AL nursing staff by end of 2026.
- Get Vocera integrated with the Jeron Provider 680 and Ascom nurse call system so alerts go directly to badges.
- Have every care setting running on enterprise-authenticated Wi-Fi with no shared password networks remaining.
- See a meaningful drop in noise complaints and communication-related disruptions in resident areas, measured by pre/post staff surveys.
- Document the process well enough that other LeadingAge Ohio members could use it as a reference for similar projects.

How will you measure the success of these goals?

I'm tracking success a few different ways, depending on the phase:

Phase 1 Network:

- Network uptime and help desk ticket volume before vs. after migration we track both in our IT help desk system.
- A coverage walk-through using UniFi heat mapping to confirm we don't have gaps in any care area.
- Fewer network-related tickets in the 60 days after cutover.
- A clean authentication audit confirming all staff devices are going through NPS/AD, not a shared key.

Phase 2 Vocera:

- Staff survey before and after deployment asking about communication satisfaction, how quickly they can respond to nurse calls, and whether noise levels in resident areas have improved.
- Vocera's built-in analytics badge utilization, call completion rates, and how fast staff are responding to nurse call alerts.
- Observation walks in SNF/Rehab and AL at 30 and 90 days post-launch to see how the badges are actually being used in practice.
- No HIPAA-related communication incidents tied to the Vocera platform in the first year.



SHAWN KISER | WESTERWOOD (FRIENDSHIP VILLAGE OF COLUMBUS LLC)

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

Lisa and I are aligned on what this project is really about. Every clinical system we run PointClickCare, Jeron nurse call, Ascom nurse call depends on the network. The Meraki infrastructure was getting expensive and wasn't meeting our needs anymore, and Lisa supported moving forward with the UniFi investment. On the Vocera side, she's seen firsthand the walkie-talkie problem and understands why it matters for residents and staff alike. We both see this as a care quality project that happens to live in IT.

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

My plan to keep Lisa in the loop:

- Monthly one-on-ones covering where we are on milestones, how the budget is tracking, and anything that needs a decision from her.
- A brief written summary after each major milestone, network cutover done, Vocera pilot launched, full rollout complete.
- I'll bring her in as needed for anything that needs executive sign-off, vendor contracts, the Vocera BAA, or anything unexpected that comes up.

Process, Timeline & Key Stakeholders

The two phases run mostly in sequence, with some overlap in Q3 as Phase 1 wraps and Phase 2 ramps up:

Period	Phase	Key Activities & Milestones
Q1-2026	Phase 1	Network RFQ finalized; vendor selected; cabling assessment complete; fiber backbone work initiated.
Q2-2026	Phase 1	AP installation and cutover begins in IL wings; staff device migration to WPA3/Enterprise authentication; Meraki decommission staged by zone.
Q3-2026	Phase 1 / Phase 2	AL and SNF/Rehab AP cutover complete; Phase 1 declared done; Vocera BAA executed; Stryker integration team engaged; Jeron and Ascom nurse call integration scoped and tested.
Q4-2026	Phase 2	Vocera pilot with SNF/Rehab nursing staff; post-pilot survey; full campus badge rollout; walkie-talkie retirement; post-deployment staff survey; final ALP documentation.



SHAWN KISER | WESTERWOOD (FRIENDSHIP VILLAGE OF COLUMBUS LLC)

People I need at the table to make this work:

Stakeholder	Role	Involvement
Shawn Kiser	Director of IT / Project Lead	Overall project ownership, vendor management, technical implementation, ALP documentation
Executive Director	Executive Sponsor	Budget authorization, organizational alignment, sponsor check-ins
Director of Nursing (SNF/Rehab)	Clinical Stakeholder	Phase 2 nursing workflow input, pilot unit selection, staff readiness
Facilities Director	Operations	Cabling and AP placement coordination, physical access to infrastructure spaces
Compliance / Legal	Risk & Compliance	BAA review for Vocera/Stryker, HIPAA compliance validation
Nursing Staff (SNF/Rehab)	End Users	Vocera pilot participants, survey respondents, adoption feedback
Stryker / Vocera	Vendor	Vocera system configuration, Jeron integration support, staff training
UniFi / Ubiquiti; (BridgeWiring)	Vendor	AP hardware, controller platform, technical support

Which of the steps described above have the potential to reshape your project or even potentially derail it?

- Cabling surprises: The network project assumes existing conduit and cable runs are usable. A site survey could turn up gaps that push cost and timeline out further than the current \$240k estimate.
- Nurse call integration complexity: Vocera tying into the Jeron Provider 680 and Ascom systems are key to Phase 2 being useful clinically. If that integration turns out to need extra middleware or isn't supported the way we expect, we'll have to renegotiate the scope.
- Staff pushback on Vocera: Nurses have used walkie-talkies for years. Some will adapt quickly; others will resist. If training isn't done right, adoption will be slow and we'll end up with badges sitting in a drawer.
- Budget exposure: The network migration is currently sitting at \$240k and Vocera adds on top of that. Any scope changes or unexpected cabling work could put us in a position where we need additional approvals mid-project.
- Cutover risk: Switching clinical systems from Meraki to UniFi is the highest-risk moment in Phase 1. Any unplanned outage that takes down PointClickCare or nurse call even briefly, has immediate care implications.

How will you ensure the group is testing the process, reexamining goals, and reconsidering how best to measure success?

I'm building in deliberate checkpoints at the end of each major milestone after the network cutover, after the Vocera pilot, and after full deployment. At each one, we'll look at whether the metrics are moving the right direction, get feedback from staff, and adjust if needed. I'm also keeping a reflective journal throughout and bringing what I'm learning back to my check-ins with Lisa.



SHAWN KISER | WESTERWOOD (FRIENDSHIP VILLAGE OF COLUMBUS LLC)

Which areas of your leadership strengths (DISC / StrengthsFinder) do you anticipate will be tested during the ALP?

My Ramsey DISC assessment (April 2026) came back Very High-S and Very High-C both at the 99th percentile with Low-I and Very Low-D. That profile is pretty accurate to how I operate, and it's shaped how I think about what I'll bring to this project and where I'm going to have to push myself.

What I'll bring:

- **Patience and follow-through:** I don't rattle easily under pressure, and I tend to stick with things until they're done. That matters on a multi-phase project with a lot of moving parts.
- **Detail orientation:** My High-C shows up in how I plan and document. For a project with HIPAA implications and a six-figure budget, that's a genuine asset.
- **Trust-building:** I'm not the loudest person in the room, but people tend to trust me because I listen and follow through. That's going to matter a lot in the Vocera rollout with nursing staff.
- **Preparation:** I don't walk into a vendor meeting or a budget conversation without having done my homework. That's helped me build credibility with leadership on both of these projects.

Where I'll be stretched:

Pushing when things stall: My Very Low-D means I'm not naturally inclined to push hard or hold people's feet to the fire. Driving vendor timelines and advocating for resources when things slow down doesn't come naturally to me, but this project requires it.

- **Communicating up:** My instinct is to give full context and all the details. Leadership usually wants the bottom line first. I have to work at flipping that order leading with the outcome and keeping the supporting detail in my back pocket.
- **Dealing with resistance head-on:** When staff push back on Vocera, my default is to smooth things over and avoid the confrontation. That won't work here. I'll need to address resistance directly instead of letting it simmer.
- **Saying no:** I have a tendency to absorb requests to keep everyone happy. With this project already on my plate, I have to be disciplined about protecting my time and not letting scope creep happen because I didn't push back.
- **Making the call without perfect data:** My High-C wants to research everything before committing. But at some point on this project cutover timing, Vocera pilot launch, vendor decisions I have to make the call on good-enough information and move.



Katie Luce

Assistant Executive Director
Brethren Retirement Community

Action Learning Project:

Transforming Care: A Person-Centered Approach

Description

Brethren Retirement Community (BRC) will shift to a more Person-Centered Care (PCC) community in our training, language, mindset and daily work. My goal is to foster a culture among our leaders, staff, and community that begins with the mindset: "This is your home. Let's explore how we can make this work for you." By shifting our focus from barriers to solutions, we can better serve our residents and create a more responsive, resident-centered community

What inspired you to choose your ALP?

In previous years, Brethren Retirement Community actively practiced an Eden Alternative approach, placing a large emphasis on resident identity, connectedness, security, autonomy, meaning, growth, and joy through training, daily communication, leader emphasis and overall staff mindset. As priorities shifted through the demanding and ever-changing years of COVID, the Eden Alternative emphasis was moved to a lower priority.

While I believe the in-depth structure of the Eden Alternative method can be overwhelming for staff at times, my goal is to promote a higher sense of Person-Centered Care in all departments and levels of care in our community. Too often, I hear staff respond with, "We can't do that." While I recognize that fostering PCC often requires additional staff time, effort, and resources, I believe we have become too accustomed to defining our limitations rather than exploring possibilities.

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

Ultimately, this ALP will change the culture of my organization. This will begin by changes in training, processes, and evaluation of staff care. Staff will adopt a person-centered mindset and this will become the expectation at BRC. It is the hope that as more and more communities place a strong emphasis on resident-driven choices, this will become the norm in our field. People can age, move to retirement communities and know that, at whatever level of care they need, they can receive it while maintaining their autonomy and choices.

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 transform staff members' mindset by fostering a person-centered philosophy of care. Staff will be encouraged to view the community first and foremost as the residents' home and to approach every interaction by asking, "How can I best support this resident in their home?" This shift emphasizes honoring each resident's preferences, values, and autonomy, ensuring that individual choices guide care delivery whenever possible.



KATIE LUCE | BRETHREN RETIREMENT COMMUNITY

How will you measure the success of these goals?

Success will be measured with resident satisfaction surveys, with questions focusing specifically on person-centered care. Staff transformation will also be measured through in-person annual training that will be interactive, encouraging discussion and feedback.

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?

The timeliness of this project is supported by the significant organizational culture change that has occurred over the past five years. During this period, Brethren Retirement Community has experienced transformation following the challenges associated with the COVID pandemic. The organization is now led by a strong and cohesive team of directors, the majority of whom were members of the BRC team prior to the pandemic and have firsthand knowledge of both the organization's previous culture and its subsequent evolution. Their shared history, commitment to the organization, and collective leadership position the team well to champion and sustain the transition to a more person-centered model of care. What is your plan to keep your sponsor engaged with your work?

My sponsor will receive written updates after each step in my timeline, as well as attend trainings to observe the project in action.

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

Expecting staff to independently drive the promotion of PCC at BRC is a significant and unrealistic expectation. Meaningful cultural change must begin with the organization's leadership by establishing clear, actionable expectations that are both practical and achievable. Each Department Director will identify one specific change their staff can implement to start to shift staff's mindset from "We can't do that" to "How can we make this work?"

I will implement the steps below to accomplish my goal:

Meet individually with each Department Director to identify one change their department will make in order to start a shift to a more PCC mindset. For example, Dining Services may choose to offer sugar-free items instead of cutting deserts in half, our current process.

- Lead in-person training on PCC for all staff, focusing on
- Work with HR Training Coordinator to implement PCC in initial staff training.
- Department Directors will implement their department's specific PCC change with staff.
- Assistant Executive Director to follow up with each Department Director:
 - 2 weeks after in-person PCC training
 - 90 days after in-person PCC training
 - 6 months after in-person PCC training
 - At this time the goal will be to implement another PCC task for their staff to focus on.
 - Resident satisfaction surveys 1 year after initial training, led by student intern.
 - Follow up with all staff 1 year after initial training for continuous annual training.



KATIE LUCE | BRETHREN RETIREMENT COMMUNITY

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

In order to successfully implement change, I need first followers. Not only do Department Directors need to buy in to a cultural change, there needs to be a first follower in each department as well. Without a team to follow the change and champion Person-Centered Care, the project will fail.

Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

Consistently check-in with Department Directors and annually with staff. See timeline above.

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

Implementing this project aligns well with my leadership style, as I identify as both a high S (Stabilizing) and a high C (Cautious). These tendencies enable me to leverage strengths in organization, collaboration, consistency, and attention to detail—qualities that will be critical in planning, coordinating, and sustaining this organizational change initiative. My ability to build relationships and thoughtfully manage processes will support staff engagement throughout the implementation of a person-centered care model.

One challenge I anticipate is navigating resistance to change. Because negativity is identified as a potential energy drainer for me, I recognize the importance of developing strategies to remain focused and resilient when encountering skepticism or opposition from staff. To address this, I plan to intentionally collaborate with team members who identify as high D (Decisive) and high I (Interactive). Their strengths in influencing others, driving action, and generating enthusiasm will complement my leadership style and help foster staff engagement, address resistance, and build momentum for change.



Darcia Lyles

Director of Nursing
Life Enriching Community/Wesley Woods

Action Learning Project: CNA Workforce Development Program

Description

My Action Learning Project (ALP) will focus on developing a CNA training program within our organization. The program would provide individuals with the education, clinical experience, and support needed to become certified CNAs while creating a pipeline of qualified employees for our organization.

What inspired you to choose your ALP?

My own healthcare journey inspired me. I started as an STNA, became an LPN, and then an RN. I understand the importance of having opportunities to enter healthcare and advance professionally. I also recognize the ongoing challenges with CNA recruitment and retention and believe developing our own workforce could help address these challenges.

How will this ALP impact your organization/community?

The program could improve CNA recruitment and retention, reduce staffing shortages and agency reliance, and provide employees with career-development opportunities. It could also provide community members with an accessible entry into healthcare and a pathway to advance to LPN or RN roles.

What are your goals?

- Develop a sustainable CNA training program.
- Create a pipeline of qualified CNAs.
- Improve recruitment and retention.
- Provide career advancement opportunities.
- Reduce reliance on agency staffing.
- Build partnerships with local schools and community organizations.

How will you measure success?

Success will be measured through enrollment and completion rates, CNA certification/pass rates, the number of graduates hired, employee retention, CNA vacancy rates, and agency usage. Participant surveys and feedback from residents, families, nurses, and leadership will also be used to evaluate the program.



DARCIA LYLES | LIFE ENRICHING COMMUNITY/WESLEY WOODS

Alignment with organizational needs

The ALP supports our organization's priorities related to staffing, retention, employee development, quality of care, and long-term workforce sustainability.

Keeping the sponsor engaged

I will provide regular updates and schedule check-ins to review progress, challenges, data, and any decisions that require leadership input.

What is the process?

Months 1–2: Assess staffing needs, review CNA requirements, research existing programs, and develop a business case.

Months 2–3: Gather feedback from nursing staff, CNAs, residents, families, HR, education, leadership, and community partners.

Months 3–5: Develop the curriculum, clinical experience, eligibility requirements, costs, staffing, and certification process.

Months 5–7: Implement a small pilot program and monitor participant progress and challenges.

Months 7–8: Evaluate the pilot and make necessary changes.

Months 8–9+: Expand the program if the pilot demonstrates that it is effective and sustainable.

What could reshape or derail the project?

Potential barriers include regulatory requirements, cost, instructor availability, staffing resources, clinical requirements, and executive approval. I will use continuous feedback and evaluation throughout the project to identify problems early and adjust the plan when necessary.

What leadership strengths will be tested?

This project will test my communication, relationship-building, adaptability, and ability to influence others. I will need to collaborate with multiple departments and remain open to changing the plan based on feedback and data.

One of my strengths is my personal experience progressing from STNA to LPN, RN, and nursing leadership. This allows me to understand the importance of creating opportunities for individuals to enter healthcare and build successful careers.



Eric Mondok

Facilities Director
McGregor

Action Learning Project: McGregor Internet Bar

Description

Tech Bars & Digital Support: Across the country, specialized "Tech Bars" offer drop-in assistance for video chatting, online banking, device troubleshooting, and digital safety. While most facilities offer property-wide Wi-Fi, finding communities with dedicated, in-house tech staff ensures residents can easily navigate tablets, laptops, and telehealth appointments. I also want to include pickup and sending of postal services including UPS, FedEx, or USPS.

What inspired you to choose your ALP?

I was inspired during our Leadership Academy Session Two visit to Maple Knoll Village, where I saw how a dedicated technology support area could help residents feel more confident and connected. It made me think about the growing need for hands-on digital assistance in our own community, especially as residents use technology for communication with family, telehealth appointments, online services, and everyday tasks. I chose this ALP because I believe a McGregor Internet Bar could provide practical support, reduce frustration, and improve residents' independence and quality of life.

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

This ALP will impact McGregor by creating a dedicated space where residents can receive consistent support with technology, communication, and digital services. As technology continues to become a larger part of daily life, residents will benefit from having a reliable place

to ask questions, troubleshoot devices, use online resources, and stay connected with family, friends, healthcare providers, and community services. The Internet Bar can also support staff by reducing one-off technology requests and creating a more organized process for assisting residents.

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

For the greater community and field of aging services, this project highlights the importance of digital inclusion for older adults and demonstrates how senior living organizations can help residents maintain independence, confidence, and connection in an increasingly digital world.



ERIC MONDOK | MCGREGOR

How will you measure the success of these goals?

Because McGregor does not currently offer this type of dedicated technology support service, one of the primary ways I will measure success is by tracking how often residents use the McGregor Internet Bar. This could include the number of resident visits, the types of requests received, and whether residents return for additional support. Over time, this usage data will show whether the service meets a real need within the community. I would also consider using brief resident feedback surveys or informal follow-up conversations to learn whether the service helped them feel more confident, independent, and connected. Staff feedback could also be helpful in determining whether the Internet Bar reduces one-on-one technology requests in other areas of the organization. Together, usage data and feedback will help determine the value and long-term sustainability of the project.

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 and I envision the McGregor Internet Bar aligning with the organization's needs and priorities by supporting resident independence, engagement, and overall quality of life. As more services, communication, healthcare resources, and everyday activities move online, residents need access to reliable technology support in a way that is approachable and consistent. This ALP supports McGregor's priority of creating a resident-centered environment where individuals are empowered to stay connected with family, manage personal needs, participate in telehealth or online services, and feel more confident using technology.

My plan to keep my sponsor engaged is to provide regular updates throughout the development of the McGregor Internet Bar, including progress made, challenges identified, feedback received, and any resources needed. I will schedule brief check-ins at key points in the project so my sponsor can provide guidance, help remove barriers, and make sure the project continues to align with McGregor's priorities. I also plan to share resident feedback, usage data, and staff input as the project develops so my sponsor can see the value and impact of the work. Keeping communication open and consistent will help ensure that my sponsor remains informed, involved, and able to support the long-term success of the ALP.

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

The process of completing my ALP will likely take one to two years because it involves more than simply starting a new service. The McGregor Internet Bar will require identifying and securing the right physical space, determining whether other amenities need to be relocated, gaining executive support, developing a funding plan, and creating a sustainable program model. The first step will be to continue refining the concept with my sponsor and identifying the specific resident needs the Internet Bar should address, such as technology support, telehealth access, communication with family, online services, and postal or package support.

Over the first several months, I would gather input from residents, staff, department leaders, and executive leadership to better understand demand, space considerations, staffing needs, and potential barriers. Residents should be included early in the process through informal conversations, surveys, or focus groups so the program is designed around what they would actually use. Team members from facilities, IT, life enrichment, social services, administration, and operations should also be involved because each area may play a role in space planning, technology setup, resident engagement, workflow, and ongoing support.

The next phase would focus on space planning and feasibility. This would include evaluating possible locations, determining whether existing amenities need to be moved or combined, estimating renovation or equipment costs, and identifying what



ERIC MONDOK | MCGREGOR

technology, furniture, staffing, and operating procedures would be needed. Executive leaders would need to be involved during this stage to review the business case, approve funding, and determine where the project fits within McGregor's broader priorities and capital planning.

After leadership support and funding are secured, the project would move into implementation. This phase would include preparing the space, purchasing equipment, setting up technology, developing policies and procedures, identifying staff or volunteers to support the Internet Bar, and creating a communication plan for residents and families. Depending on resources and

timing, McGregor could also consider involving greater community partners, such as local technology volunteers, colleges, libraries, or service organizations, to help provide education or support.

A realistic timeline would be: months 1–3 for concept refinement and sponsor discussions; months 4–6 for resident and staff input; months 6–12 for space planning, cost estimates, funding discussions, and executive approval; year 2 for construction or space changes, program development, staffing or volunteer planning, and launch. After launch, the program would continue to be evaluated through resident usage, feedback, and staff input to determine whether adjustments are needed and whether the Internet Bar should be expanded or modified over time.

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

a. Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

Several steps in the process have the potential to reshape or possibly derail the project. The biggest factors are space availability, funding, executive approval, staffing or volunteer support, and resident interest. If the appropriate space cannot be identified without negatively affecting other amenities, the project may need to be redesigned as a smaller pilot program or mobile technology support service. Funding could also reshape the project, especially if renovation costs, equipment needs, or ongoing staffing expenses are higher than expected. Executive support will be critical because this project will likely compete with other organizational priorities and capital needs. Resident interest is another important factor; if residents do not use the service in the way expected, the program may need to adjust its hours, services, location, or overall design.

To make sure the group is testing the process and not simply moving forward with the original idea, I would build in regular review points with my sponsor and key stakeholders. At each stage, we would reexamine the goals, review resident and staff feedback, look at usage or interest data, and determine whether the project still aligns with McGregor's needs and priorities. I would also use surveys, focus groups, and informal conversations with residents to test whether the planned services are useful and accessible. As the project develops, we may need to adjust how success is measured, such as tracking not only the number of visits, but also the types of services requested, repeat usage, resident satisfaction, and whether staff are seeing fewer individual technology requests. This ongoing review process will help keep the ALP flexible, realistic, and focused on creating meaningful value for residents.



ERIC MONDOK | MCGREGOR

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

My DISC assessment showed a strong D/C style, which means I tend to be direct, results- oriented, task-focused, analytical, and focused on accuracy and problem solving. These strengths will be helpful during the ALP because the McGregor Internet Bar will require planning, organization, follow-through, cost evaluation, space planning, and the ability to move the project forward through barriers. My D style will help me stay focused on the goal, make decisions, and keep momentum, while my C style will help me evaluate details, identify risks, and make sure the program is practical and sustainable.

At the same time, this ALP will test those strengths because the project will require patience, collaboration, flexibility, and relationship-building. Since the Internet Bar may take one to two years to develop and will involve residents, staff, executives, IT, operations, and possibly community partners, I will need to make sure I do not move too quickly or become too focused on the task without fully listening to others. This project will challenge me to balance my drive for results with the need to gather input, build support, communicate clearly, and remain open to changes in the plan. It will also test my ability to explain the value of the project in a way that brings others along rather than simply presenting the facts or pushing for a decision.



Todd Moore

Director of Finance
Fairlawn Retirement Community

Action Learning Project:

AI Adoption and Implementation

Description

Fairlawn is currently behind times in adoption of AI. I am working on putting policies in place and find viable options to use AI within our organization.

What inspired you to choose your ALP?

We are in a world that is constantly changing and evolving. We need to adapt to these changes or risk falling behind as an organization. As a single site stand alone, we have limited resources compared to much larger organizations. Adapting to and utilizing AI would help the organization to move at a faster pace and bring the organization into the modern day. It will provide efficiencies and the ability to make decisions with a quicker turnaround time.

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

Bringing forms of AI into the organization will have an impact in staff efficiency and improved financial performance. It will allow us to complete tasks quicker and more accurately. We plan to investigate programs to aid in the referral review, policy and letter writing to name a few. Through the process, I am certain that we will continue to find additional uses to improve the overall experience at Fairlawn for both our residents and employees.

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 put the policies, procedures, and education in place to allow employees to use AI in a safe, compliant manor. Another goal is to create staff efficiencies and cut down on the turnaround time on time sensitive tasks such as resident referral review and financial reporting.

How will you measure the success of these goals?

Success of the project will be measured in several areas. Surveys of the staff that utilize AI will be conducted to analyses the adoption rate. I will also be reviewing data on referrals to understand if our turn around time and acceptance rate has changed once the referral review process has been implemented. Staff surveys will also be conducted to help understand the staff satisfaction with new programs and process efficiencies.



TODD MOORE | FAIRLAWN RETIREMENT COMMUNITY

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?

We both agree that we need to move this project forward to better use the resources and talents that Fairlawn already has. AI will not replace anyone but it will allow us to better utilize what we have and improve upon some manual processes. It will allow for key leaders to better utilize their time and their ability to make decisions for the organization. As I work through this process, Tammy will be a key individual to review the policies and will provide essential feedback along with new ideas. It will be a collaborative effort as we are both passionate about change and new efficiencies to aid in job completion and accuracy.

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

Team Members involved: CEO, IT at first, but it will expand from there as programs are implemented. Outside resources will be brought in for policy compliance and review. Also using networking to explore areas of use and companies that could provide services.

Timeline: It starts now to lay down the foundation and create the policies that are needed to protect the organization and the information in it. I am planning on having draft policies completed in the next few months and work on reviewing and implementing new software that utilized AI during the same time frame. This project will be always evolving as the world of AI is ever changing.

This project has already changed and evolved through conversations at the Leadership Academy. I was introduced to Exacare and we are actively reviewing it for potential implementation. This is the importance of talking to peers and colleagues to gain knowledge and understanding of what is in the market today. Using resources to get results.

Which of the steps you've described in the process description above have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

The project will be reshaped many times as more knowledge is gained on what is available in the world today and into the future. One caution that could derail it is trying to implement too much too fast with a small level of staff as a single site standalone. We do not have the human capital that other organizations have. Also, we need to be diligent on who we partner with to be sure they have a viable product and are going to be in the industry for the foreseeable future as we don't want to partner with an organization that's product is taken off the market in a short period of time.

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

I will use my strength of responsibility to see the project through. Being an arranger will aid me in aligning the right people to get the desired results. Also being an achiever will give me the energy and stamina to add another project to an already full plate. I am not alone in this project, so pulling people that wear different hats and have different DISC strengths will ensure that all the right questions get asked and make this a successful project for Fairlawn.



James Phelan

Risk Advisor, Aging Services Leader
Oswald Companies

Action Learning Project:

ASCEND: Aging Services Collaborative for Enterprise Risk Navigation & Development

Description

My Action Learning Project is the development of ASCEND (Aging Services Collaborative for Enterprise Risk Navigation & Development), a proactive enterprise risk governance initiative designed specifically for Aging Services organizations. ASCEND is intended to help providers transition from managing risk reactively - often after an incident, regulatory finding, or insurance renewal - to proactively identifying, prioritizing, and navigating enterprise risk as part of everyday leadership and organizational strategy.

At the core of ASCEND is a practical risk governance framework that enables executive leadership teams, boards, and operational leaders to view risk holistically across the organization. Rather than focusing solely on insurance, safety, or compliance - the framework encourages organizations to evaluate operational, clinical, workforce, financial, regulatory, reputational, and strategic risks through an enterprise-wide lens. The framework will provide practical tools, governance principles, assessment resources, and implementation guidance that organizations of varying size and complexity can incorporate into their existing leadership structures.

While the initial deliverable is the development of the ASCEND Framework, the long-term vision is to establish ASCEND as an industry collaborative that advances enterprise risk management across Aging Services. Future phases may include executive workshops, peer collaboration, benchmarking, educational programming, and the development of best practices that strengthen organizational resilience and improve outcomes for residents, staff, and communities. By creating a common framework for proactive enterprise risk navigation, ASCEND seeks to elevate how Aging Services organizations think about, govern, and manage risk in an increasingly complex operating environment.

What inspired you to choose your ALP?

Throughout the Leadership Academy, I had the opportunity to hear candid experiences from CEOs and senior leaders about the complex challenges they navigate every day - from workforce and clinical operations to facilities, governance, and unexpected events that can significantly impact an organization. Those conversations reinforced just how interconnected these risks have become and how difficult it can be for leadership teams to step back and view them holistically.

At the same time, my work with Aging Services providers has shown me the value of taking a proactive, enterprise-wide approach to risk. Through strategic risk assessments and collaborative work with client leadership teams, I've seen how identifying and discussing risk before it becomes a loss can strengthen decision-making, improve organizational resilience, and ultimately lead to better outcomes. It made me realize that while some organizations have access to these conversations, many others do not.



JAMES PHELAN | OSWALD COMPANIES

ASCEND grew from the intersection of those two experiences. I wanted to create a practical resource that could help any Aging Services organization think differently about enterprise risk - not as an insurance exercise, but as a leadership responsibility. My hope is that ASCEND becomes a collaborative resource that is accessible to providers across the industry, helping leadership teams identify, prioritize, and navigate risk before it becomes organizational loss.

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

ASCEND is intended to create value at both the organizational and industry level. For Oswald Companies and Unison Risk Advisors, the initiative represents an opportunity to further evolve our role from insurance advisor to strategic risk management partner. By introducing a structured enterprise risk governance framework, we can engage provider organizations earlier in the decision-making process, strengthen long-term partnerships, and better align our risk management resources with our clients' operational priorities.

For Aging Services providers, ASCEND is designed to provide a practical roadmap for navigating enterprise risk across clinical operations, workforce, facilities, finance, compliance, cybersecurity, and governance. Rather than addressing these risks independently, the framework encourages leadership teams to establish a common language, prioritize organizational risks, and implement proactive strategies that improve resilience, operational performance, and long-term sustainability. Ultimately, stronger enterprise risk management supports better outcomes for residents, staff, and the communities these organizations serve.

Beyond individual organizations, I envision ASCEND becoming a collaborative platform that advances enterprise risk management across the Aging Services field. By creating opportunities for peer learning, executive education, benchmarking, and the sharing of leading practices, ASCEND has the potential to strengthen the industry's overall approach to risk governance. Over time, I believe this collaborative approach can improve how providers engage with insurance carriers, demonstrate organizational maturity, and foster greater stability within an increasingly complex and evolving healthcare environment.

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

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

The primary goal of ASCEND is to establish a practical enterprise risk governance framework that Aging Services organizations can use to proactively identify, prioritize, and navigate organizational risk. Rather than creating another compliance checklist or insurance resource, the framework is intended to provide executive teams with a structured approach to integrating enterprise risk management into leadership discussions, strategic planning, and day-to-day operations.

Within my organization, I hope ASCEND strengthens our ability to engage providers as long-term strategic partners by introducing enterprise risk conversations earlier in the relationship. The framework is intended to complement the expertise of Unison Risk Solutions and existing proprietary resources such as RiskScript®, creating a more comprehensive approach that aligns risk governance, operational improvement, and insurance strategy. By helping organizations improve their overall risk profile, we can ultimately support more resilient operations and stronger insurance outcomes.

From an industry perspective, my long-term goal is for ASCEND to become a collaborative platform that brings together Aging Services leaders to share best practices, benchmark organizational maturity, and advance enterprise risk management across



JAMES PHELAN | OSWALD COMPANIES

the field. I envision the framework serving as the foundation for future executive workshops, educational programming, peer collaboration, and broader industry initiatives that encourage organizations to move from reacting to risk toward proactively governing it. If successful, ASCEND will help strengthen organizational resilience while supporting the long-term sustainability of Aging Services providers and the communities they serve.

How will you measure the success of these goals?

the importance of your project or its potential impact; the availability of data that support the importance of your project; focus groups; etc.

The success of ASCEND will be measured through a combination of qualitative feedback, participant engagement, and long-term organizational outcomes. During the initial development phase, I plan to validate the framework by engaging executive leaders within the Aging Services industry to review its structure, relevance, and practicality. Feedback gathered through discussions, focus groups, and peer review will be used to refine the framework and ensure it addresses the operational realities facing provider organizations.

A second measure of success will be the framework's ability to improve awareness and understanding of enterprise risk management among leadership teams. This can be evaluated through pre- and post-assessments that measure participants' confidence in identifying enterprise risks, understanding organizational risk interdependencies, and incorporating risk considerations into strategic decision-making. The objective is not only to educate leaders, but to create a common language and governance approach that can be adopted across organizations.

Longer term, I envision ASCEND evolving into an enterprise risk maturity model where organizations can benchmark their progress over time. Indicators of success may include increased executive engagement in enterprise risk discussions, adoption of formal governance practices, implementation of risk mitigation initiatives, and greater collaboration across operational departments. As participation expands, aggregated benchmarking data could help identify industry trends and best practices while demonstrating the value of proactive enterprise risk management across the Aging Services field.

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

your ALP aligning with your organization's needs and priorities?

My sponsor and I recognize that the future of risk advisory extends beyond the traditional insurance transaction. As organizations face increasingly complex operational, workforce, regulatory, and financial challenges, there is a growing need for advisors who can help clients proactively identify and navigate enterprise risk before it results in significant organizational disruption.

ASCEND aligns closely with Oswald's commitment to delivering strategic value through proactive risk management and the capabilities of Unison Risk Solutions. By establishing a structured enterprise risk governance framework for Aging Services organizations, the project complements our existing resources while creating a more intentional process for engaging executive leadership in discussions around governance, operational resilience, and long-term organizational sustainability. The initiative supports our organization's objective of strengthening client partnerships by delivering meaningful risk management solutions that extend well beyond the insurance placement process.



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

Throughout the development of ASCEND, I have maintained regular communication with my sponsor to discuss the project's direction, organizational alignment, and long-term potential. As the framework continues to evolve, I plan to share key milestones, incorporate feedback, and validate that the initiative remains aligned with Oswald's strategic priorities and our investment in risk management capabilities.

In addition to ongoing discussions with my sponsor, I intend to seek input from Aging Services executives, Leadership Academy participants, and industry partners to ensure the framework reflects practical operational needs. By combining internal guidance with external industry feedback, ASCEND can continue to evolve into a meaningful resource that benefits both our organization and the broader Aging Services community.

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?

The process for developing ASCEND began with observation and pattern recognition. Through my work with Aging Services providers, I kept seeing the same theme: organizations are managing significant risks every day, but often without a common framework to connect those risks across the enterprise. My first step was to translate those observations into a practical structure that could help leaders identify, prioritize, and discuss risk in a more consistent way.

The initial phase has focused on defining the core risk domains ASCEND should address, including governance, workforce, clinical operations, vendor management, fleet safety, property and facilities, cybersecurity, emergency preparedness, claims stewardship, and board-level visibility. I have also incorporated input from internal Oswald and Unison Risk Solutions subject matter experts, insurance carrier partners, Leadership Academy peers, and provider leaders to ensure the framework remains practical and grounded in real operating challenges.

Over the next three to six months, the process will shift from development to implementation. A key milestone will be the 2026 LeadingAge Ohio Annual Conference, where I am scheduled to present alongside Brett Kirkpatrick, President & CEO of Community First Solutions. Together, we will share the process Community First Solutions and Oswald undertook to identify, assess, mitigate, and manage risk across a growing enterprise. I view that presentation as the first public launch point for ASCEND because it will demonstrate how enterprise risk management can move from concept to real-world application.

After the conference, the next steps will include gathering feedback from provider leaders, refining the ASCEND Framework, and identifying opportunities to introduce it through peer discussions, executive workshops, and LeadingAge Ohio member engagement. The continued development process should include CEOs, CFOs, clinical executives, operations leaders, facilities leaders, human resources leaders, board members, insurance carrier partners, and risk management professionals.

In two to three years, success would mean ASCEND has grown beyond an Academy project into a recognized platform for enterprise risk leadership in Aging Services. That could include the ASCEND Framework, ASCEND Assessment, ASCEND Summit, peer benchmarking, executive education, shared best practices, and future collaborative initiatives that support stronger risk governance across the field. My goal is for ASCEND to become a practical, evolving resource that helps providers move from isolated risk discussions toward a more connected, leadership-driven approach to enterprise risk.



JAMES PHELAN | OSWALD COMPANIES

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

you've described in the process description above have the potential to reshape

your project or even potentially derail it?

Even if you identify none, how will you ensure that the group is testing the process, reexamining

goals, and reconsidering how best to measure success?

The greatest challenge facing ASCEND is not developing the framework itself, but ensuring it is practical, relevant, and embraced by Aging Services leaders. Enterprise risk management can easily become too theoretical or overly complex if it is not developed with continuous input from the individuals responsible for leading provider organizations. If executive leaders view ASCEND as another compliance initiative rather than a practical leadership resource, adoption and long-term sustainability would be limited.

Another factor that may reshape the project is stakeholder feedback. As additional CEOs, CFOs, operations leaders, clinical leaders, and board members review the framework, I expect the structure, priorities, and implementation approach to evolve. Rather than viewing these changes as setbacks, I consider them an essential part of developing a framework that reflects the diverse operational realities across the Aging Services continuum. The willingness to adapt based on industry feedback will ultimately strengthen the credibility and usefulness of ASCEND.

To ensure the project continues to evolve appropriately, I intend to treat ASCEND as a living framework rather than a finished product. Feedback from Leadership Academy participants, provider executives, conference presentations, and future ASCEND workshops will be incorporated into ongoing revisions. Success will be evaluated not only by completion of the framework, but by the quality of stakeholder engagement, the practicality of the recommendations, and the willingness of organizations to integrate enterprise risk governance into their leadership processes. Maintaining this continuous improvement mindset will help ensure ASCEND remains responsive to the evolving needs of the Aging Services industry.

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

(think DISC/StrengthsFinder) do you anticipate will be tested

during the ALP?

The development of ASCEND will challenge me to leverage my leadership strengths while intentionally developing areas that are equally important to leading organizational change. My CliftonStrengths profile highlights Futuristic, Arranger, Belief, Competition, and Self- Assurance, while my DISC assessment reflects a high Influence (I) style supported by Dominance (D). Together, these strengths naturally position me to envision new ideas, build relationships, communicate a compelling vision, and bring people together around a common objective.

Those same strengths will also require discipline throughout this project. My Futuristic and Self- Assurance themes often drive me to think several steps ahead, while Competition motivates me to pursue meaningful results. Developing ASCEND, however, requires balancing vision with patience - allowing the framework to be shaped through collaboration rather than my



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own perspective alone. Success will depend on listening as intentionally as I communicate and ensuring the framework reflects the needs of Aging Services leaders rather than simply my own ideas.

My relatively lower Conscientiousness (C) on the DISC profile also reminds me that I naturally gravitate toward strategy, relationships, and momentum rather than detailed process. To ensure ASCEND is both credible and sustainable, I will intentionally seek feedback from operational leaders, subject matter experts, and my Leadership Academy peers to strengthen the framework's structure, practicality, and implementation. This collaborative approach will help transform ASCEND from an individual concept into a framework that is broadly applicable across the Aging Services industry.

Ultimately, I believe this project will strengthen my ability to lead through influence rather than authority, facilitate collaboration across diverse stakeholders, and convert strategic vision into an initiative that creates lasting value for both my organization and the Aging Services profession.

How would you like your mentor to support you in your ALP? How do you plan to maintain communication about your ALP with your mentor?

As ASCEND continues to evolve beyond the Leadership Academy, I hope to maintain an ongoing relationship with my mentor, Leadership Academy coaches, and the leadership team at LeadingAge Ohio as trusted advisors throughout the initiative's continued development. Their collective experience leading Aging Services organizations, mentoring emerging leaders, and understanding the needs of provider members provides an invaluable perspective that will help ensure ASCEND remains practical, relevant, and responsive to the challenges facing the industry.

My intent is to continue sharing updates, seeking feedback, and refining the framework as it is introduced to provider organizations and executive leaders. I also hope to collaborate with Leadership Academy coaches and LeadingAge Ohio to identify appropriate opportunities to educate and engage member organizations through conference presentations, workshops, and peer discussions. My objective is not simply to complete an Action Learning Project, but to establish ASCEND as a collaborative enterprise risk governance framework developed alongside industry leaders and continuously strengthened through their experience and feedback.

Ultimately, I hope the Leadership Academy serves as the catalyst for ASCEND's continued growth, allowing the framework to become a meaningful resource that helps Aging Services organizations strengthen governance, improve organizational resilience, and proactively navigate enterprise risk for years to come.



Melissa Price

Director of Compliance
Wexner Heritage Village

Action Learning Project:

Transforming Memory Care into a Village-Style Community Lifestyle

Describe the ALP

This Action Learning Project (ALP) focuses on transforming the existing memory care unit from a traditional room-based model into a fully immersive, village-style community.

The redesign will include purposeful, dementia-friendly spaces such as a library, coffee shop, boutique, and pub that promote autonomy, engagement, and meaningful daily experiences.

The projected timeline for completion is by the end of 2026.

What inspired you to choose your ALP?

This project was inspired by a desire to improve quality of life for residents living with dementia and to move beyond institutional models of care.

Industry models demonstrate improved outcomes and align with organizational priorities around person-centered care.

Impact

Enhances resident quality of life and engagement.

Improves behavioral outcomes.

Increases family satisfaction.

Positions organization as a leader in dementia care innovation.

Goals

Create four themed spaces: library, café, boutique, and pub.

Increase resident engagement.

Reduce behavioral symptoms.

Improve satisfaction scores.

Measurement

Family satisfaction surveys.



MELISSA PRICE | WEXNER HERITAGE VILLAGE

Engagement tracking.

Behavioral data trends.

Staff feedback.

Alignment

Supports person-centered care, quality improvement, and innovation.

Process and Timeline

Phase 1 (Planning): June–August 2026

Phase 2 (Development): September–November 2026

Phase 3 (Implementation): December 2026

Evaluation Strategy

Ongoing stakeholder feedback and data monitoring.



MELISSA PRICE | WEXNER HERITAGE VILLAGE





MELISSA PRICE | WEXNER HERITAGE VILLAGE





MELISSA PRICE | WEXNER HERITAGE VILLAGE





MELISSA PRICE | WEXNER HERITAGE VILLAGE





Ashley Puchalski

Administrator
Ohio Living

Action Learning Project: Enhancing After Hours Care

Description

After hours patient care and outcomes has been a challenge ensuring timely care and follow up. In working with leaders across all of Ohio Living we have determined this was a significant opportunity to improve care delivery with all sites. Working to improve patient outcomes, enhance patient/family/facility experience, and increase quality measure by implementing an enhanced after-hours answering service utilizing AI

What inspired you to choose your ALP?

Improving care delivery and gaining better insight to after-hours calls.

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

This platform will be implemented across all services lines and business units throughout Ohio Living which will help align all sites and improve after hours experience not only for the call but the clinicians as well.

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

Improving patient outcomes, enhancing patient/family/facility experience, decrease field staff fatigue, and improve quality outcomes.

How will you measure the success of these goals?

I will work with our organization to dig deeper into our calls that are being received after hour to determine if there is a need for education at each site with symptom management or types of opportunity. Our goal is to be more proactive in our care delivery and not reactive to better ensure patient comfort and improved quality. Continuing to monitor our CHAPS survey to evaluate quality scores/outcomes. Also placing follow up calls to families or facilities that call in to ensure they feel their needs were met in a timely manner and patients are comfortable.

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

Reviewed with my CEO and Division Director of Clinical to ensure we are focusing on Quality and improving operational efficiencies.



ASHLEY PUCHALSKI | OHIO LIVING

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

Keeping meetings scheduled to ensure we remain aligned on project roll out and standardization.

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

Started in March: Initial step gathering details from each site on challenges and current after hours process. All ED's across the state, and CEO.

April: Evaluating different vendors to help support after hours while ensuring mission alignment. Choose different leaders across the state to take part in reviewing 2-3 vendors. (Division Director of Clinical Care, CE of Information technology, Division Director of Operation support, and ED of 3 sites)

April: Completing ROI, reviewing current costs and saving with new platform (Reviewed with CEO, and CE of Ops planning and Analysis)

- May: Reviewing chosen vendor, ROI, Platform details and next steps of onboarding.

June: Setting up initial intro meetings and next steps with Vendor as well as providing weekly email updates to the team and bimonthly updates via Teams meeting. Email and Teams meetings will be with

- July: Training for Palliative Medicine and go live for Pal Med July 20th.

August: Follow up on implementation, setting up follow up training for Pal med and HH/Hospice teams. Go Live for HH and Hospice August 10th. This will include Managers and Ed's at each site.

August/September: Weekly touchpoints to ensure platform is meeting organizational expectations. Reviewing calls logs and quality dashboards. This will include Managers and ED's at each site

September-December: Follow up on quality outcomes, implementing call follow up protocols at each site to evaluate after hours quality and care delivery. This will include Managers at each site, and ED's.

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

Site engagement with process, training and implementation

Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

Daily follow up the week of go live, and then weekly follow up will be significantly important to ensure any issues are addressed, and team engagement continues.

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

Ensuring that I am meeting the needs of all team members, understanding that I may not be able to please everyone but ensuring patient care and quality remain at the forefront of the operation implementation.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,



Jasmine Soto-Flores

Manager of Community Wellness
National Church Residences

Action Learning Project: Honor at Home

Description

The Honor at Home ALP is a strategic framework designed to help our Community Wellness Department expand partnerships with VA Medical Centers while strengthening our ability to fulfill our mission. By creating a structured approach to collaboration, the ALP will enhance service delivery, increase our impact on the veterans and families we serve, and support sustainable growth through stronger relationships with VA partners.

What inspired you to choose your ALP?

I chose to focus my ALP on the Honor at Home initiative because I recognized an opportunity to strengthen collaboration between our Community Wellness Department and VA Medical Centers. As the need for coordination, veteran-centered care continues to grow, building stronger partnerships with the VA will help ensure that veterans receive comprehensive support both in their homes and throughout the community. This project aligns with our mission to improve the health, independence, and quality of life of clients while creating a sustainable framework for future growth.

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

participating in the ALP will strengthen my ability to lead strategically, collaborate across diverse perspectives, and drive meaningful change within my organization and the broader community. The knowledge, skills, and professional network I gain will help me identify innovative solutions to challenges, improve organizational effectiveness, and foster a culture of collaboration and continuous improvement.

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

I chose to focus my ALP on the Honor at Home initiative because I recognized an opportunity to strengthen collaboration between our Community Wellness Department and VA Medical Centers. As the need for coordinated, veteran-centered care continues to grow, building stronger partnerships with the VA will help ensure that veterans receive comprehensive support both in their homes and throughout the community. This project aligns with our mission to improve the health, independence, and quality of life of veterans while creating a sustainable framework for future growth.



JASMINE SOTO-FLORES | NATIONAL CHURCH RESIDENCES

How will you measure the success of these goals?

The success of this ALP will be measured using both quantitative and qualitative methods. Key performance indicators will include the number of new VA partnerships established, referral volume from VA Medical Centers, and participant retention rates. Client satisfaction surveys will be conducted to assess the effectiveness of the collaboration and identify opportunities for improvement.

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

My sponsor and I believe the Honor at Home ALP directly supports our organization's mission of improving the health, independence, and quality of life of veterans through community-based services. By strengthening partnerships with VA Medical Centers, this project will expand access to care, improve care coordination, and increase referrals to our Community Wellness programs. The ALP also aligns with our strategic priorities of building sustainable partnerships, enhancing veteran engagement, and expanding the reach and impact of our services.

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

I will keep my sponsor engaged by scheduling regular biweekly or monthly meetings to provide project updates, discuss progress toward milestones, and seek guidance on challenges or opportunities. I will also share data, meeting summaries, and stakeholder feedback throughout the project to ensure transparency and encourage collaborative decision-making. Maintaining consistent communication will help ensure the project remains aligned with organizational priorities and expectations.

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

Phase 1: Planning and Assessment (Months 1–2)

- Meet with executive leadership and my sponsor to confirm project goals and expected outcomes.
- Assess current partnerships with VA Medical Centers and identify opportunities for growth.
- Gather baseline data on referrals, veteran participation, and existing collaboration efforts.

Phase 2: Stakeholder Engagement (Months 2–3)

- Meet with representatives from VA Medical Centers.
- Obtain input from veterans and caregivers regarding service needs and barriers through surveys or informal interviews.

Phase 3: Framework Development (Months 3–5)

- Review the framework with leadership, VA partners, and key stakeholders for feedback and revisions.

Phase 4: Pilot Implementation (Months 5–8)

- Monitor referrals, communication, and program participation.
- Collect feedback from staff, veterans, caregivers, and VA partners.

Phase 5: Evaluation and Sustainability (Months 8–12)

- Analyze project outcomes against baseline measures.
- Present findings and recommendations to executive leadership.



JASMINE SOTO-FLORES | NATIONAL CHURCH RESIDENCES

- Develop a sustainability plan for expanding the framework to additional VA Medical Centers.

Key stakeholders include executive leadership, my sponsor, Community Wellness team members, VA Medical Center leadership and care coordinators, veterans and caregivers participating in Honor at Home, community partners, and data and quality improvement staff.

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

The greatest challenges may occur during stakeholder engagement and implementation. Establishing partnerships with VA Medical Centers can require significant coordination, differing organizational priorities, and extended approval processes. Limited staff availability, changes in leadership, or delays in data sharing could also affect the project timeline.

To minimize these risks, I will maintain regular communication with all stakeholders, establish realistic timelines with contingency plans, and remain flexible in adjusting project activities as needed. I will continually review progress using performance metrics and stakeholder feedback, reassess project goals throughout implementation, and make evidence-based modifications when necessary. This continuous evaluation process will help ensure the project remains responsive to organizational needs while achieving its intended outcomes.

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

Throughout Honor at Home ALP, I anticipate that several of my leadership strengths will be tested as I work to build relationships, influence stakeholders, and manage organizational change. My strengths in relationship building, collaboration, and strategic thinking will be essential when engaging VA Medical Center leaders, Community Wellness staff, and other community partners around a shared vision.

At the same time, this project will challenge me to strengthen my communication and influencing skills, particularly when navigating different organizational priorities and securing buy-in from multiple stakeholders. I will also need to demonstrate adaptability and resilience as I respond to changing timelines, unforeseen barriers, and evolving partnership opportunities.

From a DISC perspective, I expect my ability to balance collaboration with decisiveness will be tested. Building consensus is important, but I will also need to make timely decisions, hold stakeholders accountable, and keep the project moving toward its goals. This ALP will provide an opportunity to further develop my confidence as a leader while enhancing my skills in strategic partnership development, change management, and project execution.



Mike Thompson

Health Services Administrator
Otterbein SeniorLife Lebanon

Action Learning Project: Technology in Memory Care

Description

I will work with the team at Otterbein SeniorLife Lebanon to improve memory care programming and services by exploring new products that utilize technology. While Otterbein SeniorLife Lebanon provides great programming currently, technological advancements open the door to new exciting ways that we can improve the lives of those living with memory care needs.

What inspired you to choose your ALP?

Starting my career in healthcare as a STNA working on a memory care unit I have always enjoyed working with this population. Over the years I have seen new programs such as music and memory provide great benefits to those living with memory care needs as well as those caring for the individuals. Over the past year I have been introduced to products such as Virtual Reality devices and magic tables like the Tovertafel that I believe would have a positive impact on those living at our community with memory care needs as well as those caregivers. Seeing positive outcomes from innovative products and programs in the past bring me a sense of curiosity of what is out there that could continue to build upon the services and programs offered to our memory care residents living here at Otterbein SeniorLife Lebanon.

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

My hope is that the use of a product like the Tovertafel in the memory care setting will impact those residents living in the memory care setting by providing them with fun games to play that provide them with light exercise that helps their memory and focus at all levels of the disease. Additionally I would hope that this Tovertafel or Magic Table when placed strategically would draw people in, engage the residents with minimal support from the partners, and naturally provide them with social interactions by playing with groups of individuals. I could see this benefiting both the residents and the caregivers by reducing the number of behaviors related to memory deficits and restlessness.

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

The primary goal of my ALP is to utilize new technology to enrich the lives of those living in our community with memory care needs by providing additional programming that meets people where they are at all stages of the disease.

How will you measure the success of these goals?

Resident observations- Are the residents engaged and actively participating. Have residents that once had behaviors related to agitation/restlessness now having fewer behaviors.



MIKE THOMPSON | OTTERBEIN SENIORLIFE LEBANON

Partner/Resident/Family satisfaction surveys I am a believer in welcoming feedback from partners, residents, and families. Feedback from the residents and those closest to the residents will provide us with valuable information in determining how successful the product/program is.

Clinical outcomes- Track and trend outcomes such as falls on the memory care neighborhoods. Has there been a reduction in falls related to agitation and behaviors.

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?

Our Mission statement at Otterbein is "Inspired by faith we strive to enrich individual life journeys for all." For all includes those with memory care needs at all different stages of the disease process. This ALP will align with our Mission by focusing on enriching those life journeys for memory care residents. One of our six core values at Otterbein is Innovation. Exploring and implementing products that use technology to provide additional memory care programming falls under that core value. Continued advancements in what we can offer those that live in our community also aligns with our vision, "to be The Best Place to live, to work, for care, and for a fulfilling future."

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

Data Collection/Demo Potential Products- Take a close look at what programming we offer currently. Determine potential options vs need. Demo variety of products including VR, Magic Tables, Sensory products, etc.

Obtain Feedback from Leadership Team and front line Partners – Include members of leadership team including Programs Director, Philanthropy Director, Director of Nursing, Maintenance Director as well as front line programs and nursing partners to obtain honest feedback related to products viewed.

Determine Desired Quantity and Location- what number of units will be necessary to impact the desired clientele and where each unit will need to be located to have the greatest impact on those residents with memory care. Develop desired program.

Financial Feasibility – Based on the Desired quantity and location is if financially feasible to complete the project. Determine the timeframe in which the project can be completed based on the current budget. Involve the Director of Philanthropy to assess the possibility/demand of fundraising to support the project on campus.

Roll out/Installation/Training Plan- Work closely with vendor to map out a roll out/installation/training plan.

Full Implementation and Monitoring- Set a go live date to fully implement the program once partners are trained on the product/program. Utilize surveys and resident observations to continuously monitor the success of the product/program. Meet regularly with key personnel including leadership team, ADON, Front Line Partners from both programs and Nursing to obtain feedback and make adjustments as needed.

Continue to explore programs/products- Beyond the implementation of the initial program/product I will continue to explore additional products and programs that can have a positive impact on those living on our campus with memory care needs.



MIKE THOMPSON | OTTERBEIN SENIORLIFE LEBANON

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

Some potential challenges I anticipate facing along the way include Funding, Unexpected Costs, implementation/installation, and training. I will work closely with our Executive Director and our Regional Philanthropy Director to determine the best approach when it comes to funding the project. Work with Maintenance Director to determine potential unexpected costs associated with installation of the product. Consult the vendor and other prior customers to identify potential challenges faced during implementation/installation process and best practices to utilize during implementation/installation.

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

Of my StrengthFinder results I think the highest strength that will be tested is competition. As I work to implement this new product/programing for those memory care residents on our campus I will not have a direct competitor to use as a measuring stick to compare myself to through the process. While I can look at other Senior Life Communities and what they are doing for memory care patients in totality I will not have the day to day completion through the project to keep me focused and drive me forward. My DISC assessment score of a high CD shows that I like to think things through before making a decision but once the decision is made I like for things to happen quickly. Projects that take a long period of time to complete from start to finish can be a challenge for me due to the high D and desire to accomplish the goal or complete the task.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,

How would you like your mentor to support you in your ALP? How do you plan to maintain communication about your ALP with your mentor?

I would like my mentor to support me through my project by being someone that I can bounce ideas and thoughts off of and get open and honest feedback from. In the event that I run into roadblock I would hope that they would be able to take the time to listen and provide me with their perspective so I can better determine the best way to move forward in those instances. I will stay in touch with my Mentor by having scheduled check ins during the project so we can have open dialogue regarding the projects as it relates to successes, challenges, and next steps. Getting open and honest feedback through the process will help me to identify potential issues prior to the go live date.



Rachel Wirth

Chief Operating Officer
Bayley Senior Care

Action Learning Project:

Pathways to Purpose: Creating Career Pathways for Young Adults with Disabilities in Senior Living

Description

My vision is to create partnerships and career pathways between local schools and Bayley Senior Care, whereby students with disabilities have opportunities not only for employment, but also for possible careers in Senior Living. Initial exposure will be made to these opportunities while in high school and throughout the high school years with potential part-time or PRN jobs as well as mentorship and professional development via leaders within the Bayley organization. Personalized post-graduate career plans within senior living will be developed as appropriate and as interest indicates with these individuals.

What inspired you to choose your ALP?

Bayley is a strong organization on the west side of Cincinnati, specifically within Delhi Township. Bayley has created a culture that attracts employees who wish to make a career both within senior living, but specifically at Bayley Senior Care. We currently have many long-tenured employees in varied departments, many of whom have been in the organization for 20+ years. This is a wonderful challenge to have, given the commitment these individuals have shown and the relationships formed as a result. It poses a risk, however, as generationally individuals are less likely today to stay with one organization for this length of time. As these associates start to retire, Bayley wants to identify new individuals with a desire to remain with one organization for their career and creating these career pathways could be a viable path.

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

Creating career pathways for young adults and students with disabilities within senior living, and specifically Bayley, has the potential to generate meaningful impact. For Bayley the program would expand our workforce pipeline, improve employee diversity and engagement, and strengthen the culture of inclusion while filling valuable roles that are at risk with our current aging workforce. Participants would gain meaningful employment, transferrable skills, and opportunities for long-term career advancement. Beyond Bayley, this initiative could serve as a scalable model for senior living as a whole, demonstrating how healthcare and aging services can partner with schools and vocational programs to create sustainable employment opportunities.

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

Create an ongoing channel to current and future employees for Bayley, both at the entry level as well as for those looking for lifelong employment and career pathways within

Develop meaningful relationships with local schools with possibilities for future connectivity as a well-respected employer in the region



RACHEL WIRTH | BAYLEY SENIOR CARE

Create opportunities for employment for young adults with disabilities immediately, and adults of all ages into the future, for meaningful and reliable employment

Develop a scalable model for ongoing development of employment opportunities in senior care, an industry dependent on a strong and viable workforce

How will you measure the success of these goals?

- Number of partnerships with local schools created
- Number of students enrolled in the program year over year
- Number of student job postings filled
 - Retention rate (6 and 12 month) for immediate job postings filled
- Number of permanent job postings filled from student positions
 - Retention rate for permanent job postings
- Participant satisfaction scores
- School administration satisfaction scores
- Reduction in open positions
- Improved employee engagement surveys related to diversity and inclusion
- Expansion to additional locations (when applicable)

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

Workforce stabilization and succession planning are foundational pillars of Bayley's newly updated five-year Strategic Plan. As our workforce continues to age, senior leadership has dedicated significant time to assessing the risks associated with the impending retirement of many long-tenured associates. While the potential for increased turnover presents a workforce challenge, an equally significant concern is the loss of the institutional knowledge, unwavering commitment, and informal leadership these individuals bring to the organization. Developing intentional career pathways that attract, develop, and retain future long-term employees is essential to sustaining Bayley's mission and culture. By creating opportunities for individuals to build meaningful careers—not simply find jobs—we can cultivate a workforce that is committed to serving older adults while strengthening organizational stability, preserving our values, and positioning Bayley for continued growth and success.

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

- Agenda item during pre-established weekly 1:1s
- Development of KPIs for review quarterly during program rollout
- Addition to Leadership meeting agenda with key organizational leaders



RACHEL WIRTH | BAYLEY SENIOR CARE

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

A preliminary project timeline was developed to ensure this initiative is implemented in a thoughtful, strategic, and sustainable manner. Because the program's success depends on meaningful collaboration with community partners and a long-term commitment to workforce development, the timeline prioritizes deliberate planning over rapid implementation. This approach allows adequate time to build strong partnerships, engage key stakeholders, and establish the infrastructure necessary for lasting success. The proposed launch is scheduled for early September 2026 to align with the academic calendar while remaining mindful of the demands school districts face at the start of the school year. This timing provides an opportunity to engage educators, students, and families after the initial transition back to school, creating a stronger foundation for participation and collaboration.

Timeline	Phase	Key Activities	Stakeholders to Engage
Months 1-2	Discovery & Planning	Form steering committee; Define goals; Identify job opportunities; Assess readiness	Executive Leadership; HR; Department Directors; Resident Council; Board of Directors
Months 2-3	Community Partnership Development	Meet schools-connect with Oak Hills School District specifically; Connect with transition coordinators; Partner with vocational rehab leaders;	School Superintendent/Appropriate Leaders; Special Education Directors; Transition Coordinators; Guidance Counselors; Hamilton County DD Board; Parents; Students
Months 3-5	Program Design	Identify career pathways; Develop job coaching; Create training; Train supervisors	HR; Department Managers; Associates; Resident Volunteers; Risk Management
Months 5-7	Recruitment & Matching	Present program; Student sessions; Interview; Match students; Orient families	Students; Families; Teachers; Job Coaches; Department Leaders; Mentors
Months 7-12	Pilot Program	Launch "internships;" Monthly check-ins; Collect feedback; Adjust	Students; Families; Residents; Staff Mentors; School Officials; Community Partners
Month 12	Evaluation & Expansion	Measure outcomes; Present results; Identify funding if appropriate; Expand	Executive Team; Board; Community Partners; Funders; Media; Local Officials

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

This initiative is intentionally designed to be flexible and responsive as it evolves. Because the program's success is closely tied to the needs, priorities, and performance measures of participating school districts, ongoing collaboration will be essential. Regularly scheduled meetings with school partners will be incorporated into the project timeline to review progress, evaluate outcomes, and make adjustments as needed to ensure the program continues to meet the needs of both students, schools, and Bayley.



RACHEL WIRTH | BAYLEY SENIOR CARE

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

As a leader with a high I (Influence) complemented by a strong C leadership style, this project will challenge me to leverage both my relational and analytical leadership strengths. My influencer style will be essential in building partnerships with schools, community agencies, parents and students, and internal leaders within Bayley while inspiring others to embrace a shared vision of creating meaningful employment opportunities for individuals with disabilities. My strong conscientiousness will help ensure the program is thoughtfully designed, well-organized, and built on clear processes, measurable outcomes, and regulatory compliance within the senior living space. At the same time, this project will stretch my leadership by requiring me to balance enthusiasm and relationship-building with patience, and disciplined execution. The longer anticipated timeline will require me to remain focused and not launch into a process (that may or may not meet the needs of the students/school) in order to get the project up and running. My tendency to “jump right in” will need to be kept at bay to navigate differing perspectives and maintain momentum through change with keeping focused on long-term sustainability.



Lyndi Wyrstek

Social Worker/Program Manager
MemoryLane Care Services

Action Learning Project:

Beyond MemoryLane: Building a Center for the Caregiver's Hidden Journey

Description

My action learning project is to develop a caregiver center for the greater Toledo community. The goal of the caregiver center is to give MemoryLane Care Services adult day center family caregivers along with caregivers in the community a place to rest or take a break during their busy day. Another goal of the center is to provide additional resources, education, support and access to health care services for family caregivers within the community. The MemoryLane Caregiver Center would include monthly opportunities for caregivers to receive the health care and attention they need. The goal is to partner with local health care providers to offer monthly health and wellness screenings as well as foot care, vaccinations, and health education. MemoryLane Care Services would also use the caregiver center to offer Memory Cafes for individuals in the early stages of dementia, support groups, caregiver wellness services such as massage therapy and medication, one-on-one appointments and walk-ins to speak with knowledgeable professionals, and a comfortable and welcoming space to connect with other family caregivers.

What inspired you to choose your ALP?

Although MemoryLane Care Services provides wonderful care and support to individuals living with dementia and their family caregivers, more could be done to support the health and wellness of the caregiver. Unfortunately, the health of a caregiver often suffers due to their caregiving role. There is a higher risk of depression, social isolation, co-morbid conditions, and death for family caregivers of individuals living with dementia. Additionally, currently, in the Toledo area, there is no caregiver center, or a one-stop shop for health wellness and information about caring for someone with dementia, or for individuals who have been recently diagnosed with dementia. Our goal is to make the MemoryLane Caregiver Center a hub in the community and a place where caregivers and individuals alike can gather.

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

The MemoryLane Caregiver Center would have a great impact on our organization, the greater community, and field of aging services. While providing emotional, health, and wellness support to caregivers, we could reduce their risk of health conditions, which will allow them to care for their loved ones longer, and help both the caregiver and individual living with dementia live longer with an improved quality of life. If we can support the caregiver, their risk of developing dementia can also be reduced.



LYNDI WYROSTEK | MEMORYLANE CARE SERVICES

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

The goals of the organization and greater community that will be accomplished through this ALP are improving the health and wellness of caregivers, increasing the health literacy of the community of Alzheimer's disease and related dementias through education and training.

How will you measure the success of these goals?

We would conduct focus groups with MemoryLane Care Services family caregivers to collect feedback on what services should be offered within the caregiver center. We would also partner with the Area Office on Aging of Northwestern Ohio to collection information and data on the needs of caregivers in the community. Other partner organizations would include local senior centers in which we would facilitate focus groups and implement surveys to collect feedback from a wide range of individuals. For sustainability purposes, once the caregiver center is developed, we could conduct baseline surveys with family caregivers on quality of life and health measures when individuals first start using the caregiver center and offer a follow up interview six months after utilizing the center to gather information on the impact of the center.

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

Review and analyze MemoryLane Care Services strategic plan to ensure the project fits within the goals and objectives outlined by MemoryLane Care Services Board of Directors and stakeholders.

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

Align goals, timeline, and next steps with MemoryLane Care Services Executive Director. Incorporate ALP into regularly scheduled check-ins with sponsor.

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

Develop a plan to create a MemoryLane Care Services Caregiver Center within the greater Toledo community.

Gather feedback from MemoryLane Care Services leadership staff, ADS Directors, Social Services Director, and Social Workers.

Conduct a research analysis on caregiver center's both nationally and internationally to find best practices, duplicability, and models to follow.

Provide theoretical framework and project proposal to MemoryLane Care Services Board of Directors.

Based on the feedback from all parties involved, partner with the Area Office on Aging of Northwestern Ohio and local senior centers to conduct focus groups to gather information and feedback from the community on their needs and what they would like the caregiver center to offer.

Contact and purpose a partnership with local health agencies such as Neighborhood Health Association to offer health care services to family caregivers.



LYNDI WYROSTEK | MEMORYLANE CARE SERVICES

Explore potential funding sources, reimbursement mechanisms and fee for service models to ensure the MemoryLane Caregiver Center is financially viable.

Based on caregiver and community feedback, partnership alignment, and buy-in from MemoryLane Care Services Board of Directors and stakeholders, launch the MemoryLane Caregiver Center in 2027.

Which of the steps you've described in the process description have the potential to reshape your project or even potentially derail it? Even if you identify none, how will you ensure that the group is testing the process, reexamining goals, and reconsidering how best to measure success?

During the process of collecting data and conducting surveys to examine the need for the caregiver center, I anticipate we will find more information about the unmet needs of caregivers and adjust the goals of the caregiver center to meet those needs. For example, if we find that caregivers within the community are experiencing unmet nutritional needs, we will shift our focus and partnerships to align with the needs of the community.

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

One of the areas of my leadership strengths that I anticipate will be tested during the ALP is my C, which I scored mid-range-low in my DISC Assessment. For example, my analytical and factual side will be tested during this project. Being a high I, I tend to work off emotions and feelings and am highly relational. I want to engage with others and incorporate their ideas, insights, and feedback into a project, which may not be feasible within a large-scale project such as a caregiver center. Utilizing my C will be a challenge but will need to be utilized to make this project successful.

OPTIONAL: If you plan to incorporate your mentor in your ALP process,

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

I would like to include my mentor in this ALP process by asking for feedback, advice, and strategies for implementing new programing into an organization and community.

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

I will maintain communication with my mentor about my ALP during our monthly meetings.



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