



WHITE PAPER

**2016 National Emerging Leadership Summit for Healthcare Administrators in Aging Services:
From “Professionals Leading Passionate Innovation” to
“Advancing our Profession, Enhancing Lives”**

June 21 – 23, 2016

AUTHORS

Kevin Hansen, Ph.D., J.D., LL.M., University of Wisconsin – Eau Claire

Douglas Olson, Ph.D., MBA, University of Wisconsin – Eau Claire

Robert Burke, Ph.D., The George Washington University

BACKGROUND

The National Emerging Leadership Summit's (NELS) purpose is to provide Generation X and Generation Y leaders in the field of health and aging services administration the ability to engage in discussions of current best practices with other leaders, meet with representatives of key professional organizations, gain an inside perspective on the legislative process, and explore solutions for attracting and retaining other Generation X and Generation Y leaders. The NELS Summits also strive to consider participants from multiple long-term care (LTC) organizations and services, such as skilled nursing facilities, nursing homes, assisted living settings, continuing care retirement communities, home care, hospice, and adult day care services. Many professionals currently in the LTC field recognize there is a need to prepare future LTC leaders to work beyond silos of service and adapt to the changing consumer demands.

With the advent of the survey process in LTC settings to ensure quality of care and quality of life, there has been increased negative publicity of the LTC field and the administrator profession.¹ It has also been noted that the LTC profession is facing an employment cliff, with more people leaving the administrator profession than entering it.² Several factors contributing to this turnover phenomenon include a fragile educational field, challenging societal views, a difficult and reactive regulatory environment, and a tendency to focus on management rather than leadership.³ News media sources have also provided ample coverage of individuals and care settings that have provided less-than-quality care to residents, and there have been multiple legislative hearings on the quality of care and quality of life in LTC settings. As such, from surveys of past NELS attendees, participants have felt that the public at large has a negative, incorrect view of the LTC administrator profession and that the public persona of the profession needs to be addressed in a positive, proactive approach.

A steering committee composed of leaders from higher education, professional associations, and past NELS alumni tasked itself with addressing the public image and perception challenges of the LTC administrator profession. To address the many facets of this profession, the NELS Summit continues to bring together today's LTC leaders with a group of the most talented Generation X and Generation Y administrators. These uniquely positioned professionals are eager to transform the LTC administrator profession, and also recognize and accept the responsibility to effect and realize the needed change. The LTC administrator profession requires the best and brightest individuals leading these critical human service organizations to provide and coordinate the highest level of care for older adults.

The Summit combines current best-practices with a facilitated dialogue to provide a new perspective for both Summit participants and the broader field. The 2016 participants made further strides to advance the foundational work from the previous five Summits and emphasize their own agenda. The purpose of this white paper includes: providing evidence and support for the professional field of health and aging services administration to advance positive changes, set a foundation for planning the 2016 Summit; and serve as an additional reference for the current and next cohort.

SUMMIT PROCEEDINGS

The National Emerging Leadership Summit (NELS) is a three-day gathering of rising leaders throughout the country in the field of health and aging services administration. Participants at NELS are able to engage in group work with other emerging leaders, discuss current best practices, meet representatives of key professional organizations, explore solutions for the next generation of leaders, and gain insight on the legislative process for health care-related policy. Throughout the summit, participants were able to review the work and progress of past NELS participants, as well as develop their own action plans in order to advance the profession. This white paper reflects the information presented to participants, including insight from a legislative forum at the United States Senate, a panel session with representatives from partnering organizations, and the action plans formed as a result of participants' work during the 2016 NELS Summit.

During the first day of the Summit, **Dr. Doug Olson**, Professor, University of Wisconsin – Eau Claire, introduced some of the current challenges and problems facing the health and aging services administration field to the participants. Some of these issues included silos of settings, poor societal image, management orientation, and being a reactive vs. proactive profession. There was also discussion involving participants about potential solutions to these current challenges to the profession. **Dr. Kevin Hansen**, Assistant Professor, University of Wisconsin – Eau Claire, followed with a discussion of the backgrounds of the participants, based off a survey questionnaire completed prior to the Summit. By bringing together participants from multiple long-term care (LTC) organizations and services, such as skilled nursing facilities, nursing homes, assisted living facilities, continuing care communities, home care, hospice, and adult day care services, the group of participants represented many different perspectives and approaches on how to explore solutions to current challenges.

The participants also benefitted from a discussion led by **Michael Muetzel, MBA**, Mx Marketing Management Solutions, who is an expert in generational differences. Mr. Muetzel discussed how generational values differ, and the impact those differences have on your organizational culture throughout a facility. He discussed differences in values between Baby Boomer



workers, Generation X workers, and Millennial workers. He concluded his presentation by suggesting practical methods for integrating generational values and expectations into workplaces while still maintaining a balanced budget. Some of the keys to a successful work culture discussed included trust and employee equity, feeding the growth of the organization through development and mentor opportunities, flexibility, transparency, and a willingness to change. Mr. Muetzel also emphasized the fact that change is an inherent part of leadership and is key to building a successful team.

As part of the seventh annual NELS Summit, on the second day, participants attended a legislative forum at the United States Senate. Following an introduction by **Dr. Robert Burke**,

George Washington University, the forum began with dialogue led by **Kathleen Laird**, Legislative Assistant to **Senator Tammy Baldwin (D – WI)**. Ms. Laird discussed Senator Baldwin’s aging priorities, as the Senator has expressed her desire to ensure programs are set up in communities to take care of the aging adult population. She discussed the process of reauthorizing the Older Americans Act and some of the challenges involved in the reauthorization process. Another piece of legislation that Ms. Laird discussed is the

Recognize, Assist, Include, Support, and Engage (RAISE) Family Caregivers Act (S. 1719/H.R. 3099),⁴ that Senator Baldwin is currently advocating, co-sponsored by Senator Susan Collins (R – ME). This legislation would develop a plan to craft a national strategy to support family caregivers, with support from the Department of Health and Human Services. This legislation supports different programs for family caregivers, and potentially alleviate some of the economic burden put on families. The RAISE Family Caregivers Act has passed in the Senate and is awaiting further action in the House. Ms. Laird also discussed the importance of constituents writing to the Senators about issues or current legislation, as feedback on current issues and legislation can have a significant impact on progress. Following this discussion, **Anne Montgomery, M.S.** shared her perspectives on the legislative process as a former senior policy advisor for the Senate Special Committee on Aging under former Senator Herb Kohl (D – WI).

Ms. Montgomery discussed the future of health care in the United States, as Medicare spending has doubled and will double again by the year 2020. Another point discussed was the need to re-engineer current health care programs to use resources more cost-effectively and more intelligently. With the challenges that the health care industry faces in the future, she emphasized that it is not enough to focus solely on the LTC field, and that we must be thinking on a much bigger level.



Following a short break, participants were able to listen to a panel on Advocacy for the Profession, moderated by **Dr. Kevin Hansen**. Panelists included representatives from the following organizations: the American Health Care Association (AHCA/NCAL), LeadingAge, the

American College of Health Care Administrators (ACHCA), Altarum Institute, and the National Association of Long-Term Care Administrator Boards (NAB). **Clifton Porter**, Senior Vice President of Government Affairs, AHCA/NCAL, began the session by discussing the importance of being engaged in the legislative process. He stressed the fact that members of Congress want to hear from constituents,



especially about issues in the workforce. He also mentioned the benefit of inviting Congress members to local care settings, especially for special events (e.g., Veterans Day programs). **Anne Montgomery** spoke next, emphasizing Mr. Porter's message by discussing the vital role of getting involved and playing a role in the legislative process. She also elaborated on effective strategies for working with legislators and their staff members to advance policy ideas. Next, **Dr. Cheryl Philips**, Senior Vice President of Public Policy and Health Services, LeadingAge, discussed regulatory challenges in the field of health and aging services. She discussed the need to create a climate of safety for residents, while still being able to deliver resident-centered care. While regulations can sometimes have a negative impact on care settings, Dr. Phillips explained the importance of contacting regulatory agencies with specific examples of how changes have affected care settings and to offer solutions and recommendations on how to address challenges. Following Dr. Phillips, **Cecilia Sepp, CAE**, President and CEO of ACHCA, emphasized the role of professional and trade associations in the policy advocacy process.

Associations, such as ACHCA, monitor changes occurring in the industry and are aware of current issues affecting the field. As many of these organizations partner on initiatives, they have a substantial "voice" in legislative and regulatory processes. Coalitions between organizations have greatly benefited the LTC industry by advocating for effective policy during regulatory processes. The panel concluded with **Dr. Keith Knapp**, President and CEO, Christian Care Communities, who discussed licensing programs for administrators as well as education in the industry. Dr. Knapp emphasized the importance of the continuing evolution of education in the LTC field, including the development of new programs across the country, as the field is always changing and facing new challenges. The legislative session and its subject matter are discussed in more detail in the NELS legislative policy brief.⁵



Following the morning sessions and lunch at the Senate, participants continued brainstorming different areas to focus on for their final action plans. Doug Olson and Michael Muetzel led a fast-paced activity where participants rapidly listed challenges and opportunities in the health and aging services field. Many different ideas from all aspects of the profession were mentioned and considered. Additionally, the participants discussed the current NELS mission statement, or "holy grail," which has been "Professionals Leading Passionate Innovation." The 2016 NELS participants had the opportunity to brainstorm ideas for a new holy grail in small

groups, and eventually collaborated to come up with a new mission statement for NELS. The participants ultimately advocated for a more honed and new NELS mission statement: “Advancing our Profession, Enhancing Lives.”

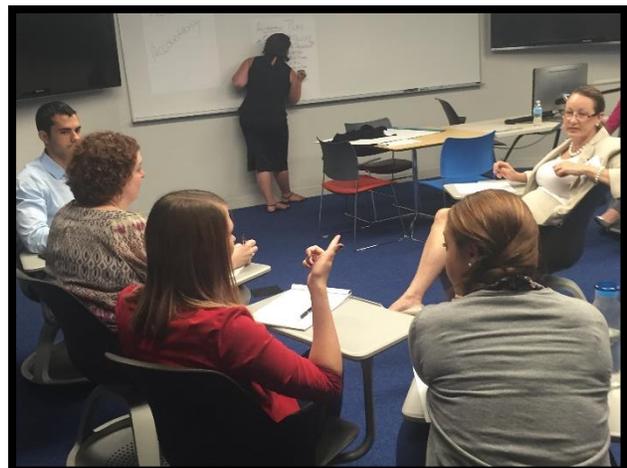
On the final day of the summit, participants had the opportunity to attend a panel session, led by representatives from partnering organizations, in order to provide updates about the work conducted to date on the past NELS recommendations. Panelists included:

- **Christy Kramer, MHS**A, Director, LeadingAge D.C.
- **Randy Lindner, MHS**A, CAE, President and CEO, National Association of Long Term Care Administrator Boards (NAB)
- **Cecilia Sepp, CAE**, President and CEO, American College of Health Care Administrators (ACHCA)
- **Scott Tittle, J.D.**, Executive Director, National Center for Assisted Living (NCAL)

The panel emphasized the importance of joining professional and trade organizations to benefit the field of LTC and to work toward an improved public image. Following the panel session, participants were divided into small groups to discuss issues mentioned during the panel with each of the panelists, as well as any other thoughts and questions participants had for the panelists. These breakout sessions allowed participants to have more direct conversations and networking opportunities with the panelists, and for them to gain a perspective on how NELS has influenced partnering organization decisions and policies advanced by the organizations on the legislative and regulatory fronts.

OUTCOMES

All throughout the three days, participants brainstormed challenges to focus on for their final action plans and for their post-Summit work. On the final day, led by Mr. Muetzel, the large group narrowed the various categories of initiatives to prioritize down to two different areas of focus. Participants were then able to choose which group to join, based off their personal interests. The final two categories chosen to focus on included an Accountability Group and a Workforce Group. Groups were then given time to collaborate and come up with final action plans to be working on throughout the coming year. These action plans included setting deadlines and assigning duties to members of each group in order to efficiently execute the outlined work plans. The work discussed by participants included the following:



1. The **Accountability Group** focused on following up with previous NELS participants, tracking the implementation and results of their action plans, promoting the progress made on those initiatives, and creating a newsletter for NELS that highlights the work performed during and following each NELS Summit. Members of the accountability group decided that the newsletter should be semi-annual, and should focus on positive outcomes that have resulted from participants' work at the NELS Summits. They also discussed the importance of getting our sponsors involved in successful projects and possibly including them in the newsletters. Another focus for the group was to create a video displaying the mission of the summit as well as other information about the success of previous action plans and projects that are currently being implemented.
2. The **Workforce Group** focused on enhanced recruitment of talented individuals into the LTC workforce. One of the main goals articulated was to use many different platforms (e.g., social media, blogs, posters) in order to attract more individuals to the profession. The importance of a presence on Facebook or other popular social media platforms (e.g., LinkedIn) was highly emphasized by this group, as the population is becoming more connected through the internet. The action plan included creating a video to advertise on social media, with testimonials from professionals in the field discussing their experiences in LTC roles. Another aspect of the action plan included a plan to complete at least twenty visits to high schools and colleges in order to spread awareness of the LTC administrator profession in an attempt to attract more individuals. By branding and using targeted awareness, the workforce group planned their work to effectively attract talented professionals to the LTC administration profession.



The Summit concluded with each participant speaking personally about the impact NELS had on them and by expressing how inspired they were by the Summit. Participants committed to being more involved in legislative processes, to work towards advancing the public image of the LTC profession, and to implement their own action plans in the coming months. Many of the participants felt inspired to create a better profession for themselves and for future generations by advancing our profession and enhancing lives.

ACKNOWLEDGEMENTS

The authors of this white paper sincerely appreciate the insights and support from the steering committee members and the excellent assistance from Luke Jackson, a health care administration student from the University of Wisconsin – Eau Claire, and both Jaclyn Donohue and Jacqueline Barbarito, graduate students from The George Washington University.

2016 Steering Committee Members:

- **Vani Barry**, Administrator, Good Samaritan Society
- **Tori Blackwell**, Administrator and Event Coordinator, Milken Institute School of Public Health, The George Washington University
- **Dr. Robert Burke**, Professor, Health Services Management and Leadership Department, Milken Institute School of Public Health, The George Washington University
- **Stephanie Capelle**, Executive Director, Nine Mile Creek Senior Living
- **Jeffrey Degyansky**, Administrator, Menorah Park Center for Seniors
- **Dr. Kevin Hansen**, Assistant Professor, Health Care Administration Program, University of Wisconsin – Eau Claire
- **Christy Kramer**, Director, LeadingAge D.C.
- **Brian Lenehan**, Administrator, Life Care Services/Vantage House
- **Randy Lindner**, President and CEO, NAB and the NAB Foundation
- **Mike Muetzel**, Founder and CEO, Mx Marketing Management Solutions
- **Dr. Douglas Olson**, NELS Program Director and Professor, Health Care Administration Program, University of Wisconsin – Eau Claire
- **Keri Oviedo**, Vice President of Human Resources, Golden Living Centers
- **Urvi Patel**, Senior Manager Quality Improvement, American Health Care Association
- **Emily Rickman**, Administrator, Alden Management Services
- **Daniel Schwartz**, Chief Operating Officer, Almost Family
- **Cecilia Sepp**, President and CEO, American College of Health Care Administrators
- **Sara Sherwood**, Administrator, Collier's Rehabilitation and Nursing Center
- **Cynthia Thorland**, Vice President, Director of Talent Development, LCS
- **Dr. David Wolf**, Associate Professor, Health Services Administration, Barry University

SPONSORS AND SUPPORTERS

The annual NELS Summit is generously supported by the following organizations, and the authors of this white paper extend their deepest gratitude and appreciation to the contributors who make every NELS Summit possible.

Co-sponsors:



Supporters:



The Wertlieb Family



University of Wisconsin
Eau Claire

Milken Institute School
of Public Health

THE GEORGE WASHINGTON UNIVERSITY

SUMMIT PARTICIPANTS

The following individuals were attendees at the 2016 NELS Summit, representing professionals from a variety of long-term care and health care settings along the continuum of care:

Jacqueline Barbarito, graduate student, The George Washington University

Erica Dalziel, Administrator, Alden Estates of Jefferson

Trevor Davis, Administrator, Providence Group, Inc.

Jaclyn Donohue, graduate student, The George Washington University

Ashley Douglas, Administrator, TLC Management, Inc.

Emily Garba, Administrator, Life Care Services/Terraces at the Clare

Kevin Goedeke, Administrator, Villa Rosa Nursing and Rehabilitation Center

Morgan Holien, Administrator, Life Care Services/Sandhill Cove Retirement Living

Luke Jackson, undergraduate student, University of Wisconsin – Eau Claire

Melissa Jackson, Chief Executive Officer, Vermont Veterans' Home

Sarah Kern, Admissions and Marketing, Heartland of Woodbridge

Tina Larose, Administrator, Weston Senior Living Center

Elizabeth Liberman, Healthcare Analyst, National Investment Center

Marjorie Love, Administrator, Island Nursing Home

Nicole Mattson, Administrator, Good Samaritan – Specialty Care Community

Whitney O'Donnell, Associate Director, Membership and Chapter Relations, ACHCA

Sena Quist, Administrator, Life Care Services/The Cypress of Raleigh

Mike Ricks, Regional Director of Operations, Diakonos Group, LLC

Patrick Sweeney, Administrator, Meridian Subacute Rehabilitation at Wall

Natasha Urinko, Administrator, Good Samaritan – Evangelical Lutheran

Sharon Zeigler, Area Vice President, Golden LivingCenters

REFERENCES

¹ Cummings, M. Reputation, Public Policy, and Consumer Choice: Lessons from the Nursing Home Industry. Babson College.

(<http://www.babson.edu/executive-education/thought-leadership/life/Pages/reputation-public-policy-and-consumer-choice-lessons-from-the-nursing-home-industry.aspx>)

² The Long-Term Care Workforce: Can the Crisis be Fixed? Problems, Causes, and Options. Report to the National Commission for Quality Long-Term Care prepared by the Institute for the Future of Aging Services. 2007.

(<http://www.leadingage.org/uploadedFiles/Content/About/Center for Applied Research/Center for Applied Research Initiatives/LTC Workforce Commission Report.pdf>)

³ Dana, B. and Olson, D. (2007). Effective Leadership in Long Term Care: The Need and Opportunity. American College of Health Care Administrators Position Paper.

(www.achca.org)

⁴ For more information on the RAISE Family Caregivers Act, please visit:

(<https://www.baldwin.senate.gov/imo/media/doc/8.3.15%20RAISE%20Family%20Caregivers%20Act%20Fact%20Sheet.pdf>).

⁵ Please contact either Dr. Douglas Olson (olsondou@uwec.edu) or Dr. Kevin Hansen (hansekev@uwec.edu) for a copy of the policy paper and legislative summary for the 2016 NELS Summit.