



**National Emerging Leadership Summit
for Health and Aging Services Executives**

WHITE PAPER

The 2018 National Emerging Leadership Summit for
Health and Aging Services Executives:
Advancing our Profession, Enhancing Lives

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KEY CONCLUSIONS

The 2018 National Emerging Leadership Summit (NELS) produced three primary outcomes from the work conducted by participants over the three days: focusing on improving **Recruitment and Retention Strategies** in health and aging services, to find solutions for staffing shortages; educating professionals on **Policymaking** and how individuals can participate in the legislative and regulatory processes; and **Educating Consumers** on the resources and options available in the health and aging services, especially for first-time consumers and family members. The Summit finished its last day with each participant speaking about the impact NELS had on them and by expressing various levels of inspiration provided by the Summit experience. Many of the participants felt motivated to create a better profession for themselves and for future generations by developing proactive, innovative solutions to enrich lives.

BACKGROUND

The purpose of the National Emerging Leadership Summits is to provide Generation X and Generation Y leaders in the field of health and aging services 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 and rulemaking processes, and explore solutions for attracting and retaining leaders from their peer groups. 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, life plan communities, home- and community-based services, rehabilitation hospitals, 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 traditional silos of service and adapt to changing consumer demands.

Even with the advent of the survey process decades ago in nursing home settings, designed to ensure quality of care and quality of life, and despite documentation of improved quality, there has been a steady decline in public opinion and more negative publicity of the LTC field and the administrator profession.¹ With a steady reduction over the past decade in the number of applications submitted for becoming a licensed nursing home administrator, this field is facing an employment cliff. There are currently more people leaving the administrator profession than entering it.² Several factors contributing to this turnover phenomenon include an educational field without an adequate number of robust programs at universities, 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, utilizing a positive, proactive approach.

A steering committee composed of leaders from higher education, professional and provider associations, and NELS alumni tasked itself with addressing the public image and perception challenges of the field of health and aging services. The steering committee met regularly to discuss issues affecting the profession and to plan the content for the Summit experience. To address the many facets of this profession, the NELS Summit continues to bring together today's emerging professionals from various health and aging services settings with a group of the most talented Generation X and Generation Y leaders. These uniquely positioned professionals are eager to transform the health and aging services administrator profession, and also recognize and accept the responsibility to realize and champion the needed change. The health and aging services 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 Summits combine current best practices with a facilitated dialogue to provide a new perspective and voice for both Summit participants and the broader field. The 2018 participants made further strides to advance the foundational work from the previous seven Summits and emphasized their own agenda. The purposes of this white paper are to provide evidence and support for the professional field of health and aging services administration to advance positive changes, set a foundation for planning the 2019 Summit, and serve as an additional reference for the current and next NELS Summit cohort to hear the voice of the next generation of leaders.

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- and aging services-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 for advancing the profession. This white paper reflects the information presented to participants, including insight from a legislative policy forum, a panel session with representatives from partnering organizations, and the action plans formed as a result of participants' work during the 2018 NELS Summit.



During the first day of the Summit, participants were welcomed by **Kevin Hansen, Ph.D., J.D., LL.M., FACHCA**, Director, NELS and Assistant Professor, University of Wisconsin - Eau Claire, and **Douglas Olson, Ph.D., MBA, FACHCA**, Senior Advisor, NELS and Professor, University of Wisconsin - Eau Claire. Each gave background on the

Summit, the profession of health and aging services leadership, and some historical information on the District of Columbia. Dr. Olson led the first presentation, which introduced some of the current challenges and problems facing the health and aging services administration field.



Some of these issues included the decline in NAB applicants and renewals, poor societal image, management shifts, leadership practices, and attraction of the younger generation in the workforce. There was also a discussion involving participants about potential solutions to these current challenges to the profession. Dr. Hansen then followed with a discussion of the backgrounds of the participants, based on a survey questionnaire completed by attendees prior to the Summit. Bringing together

participants from multiple long-term care organizations, such as skilled nursing facilities/nursing homes, assisted living facilities, continuing care communities, life plan communities, home- and community-based services organizations, hospice providers, and more, enabled participants representing many different perspectives and approaches to explore solutions to current challenges.

Following lunch, sponsored by the American Health Care Association and National Center for Assisted Living (AHCA/NCAL), NELS participants were split into smaller groups to begin the first team activity. During this session, each group identified ideas that it felt related to what had been learned up to this point at the Summit, as well as information that was surprising. Each group was then responsible for creating a team name and drawing a picture that would encompass the NELS mission and represent the team.

After the group activity, **Michael Muetzel, MBA**, Mx Marketing Management Solutions, an expert in generational characteristics, discussed how generational values differ, and highlighted the impact those differences can have on an organizational culture throughout a care community. He discussed variances in values among Baby Boomer workers, Generation X workers, Millennial (or Generation Y) workers, and those from the post-millennial generation (Generation Z). Mr. Muetzel emphasized that the millennial generation prefers to work *with* you and not *for* you, in contrast to Generation X, who simply worked to live, and Baby Boomers, who were defined throughout their lives by their work. 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, and feeding the growth of the organization through development and mentoring opportunities, flexibility, transparency, and a willingness to change. Mr. Muetzel also



emphasized that change is an inherent part of leadership and is key to building a successful team.

New to the NELS Summit this year, based on prior participants' requests, was the Best Practices and Networking Session, led by **Keith Knapp, Ph.D., MHA, CNHA, HSE, FACHCA**, Associate Professor, Bellarmine University. Dr. Knapp had participants break into groups to discuss topics identified by NELS attendees in the pre-Summit survey. The topics discussed were staffing issues, incorporating ideas from



other industries in health and aging services, targeted programs for special populations, the regulatory environment, work-life balance, and workplace culture. This new session gave participants the opportunity to discuss the biggest challenges facing their respective care communities and organizations, as well as openly share ideas and best practices to address these issues. Following this session, participants gathered for a networking social, where many of the conversations from the Best Practices session continued.

On the second day of the ninth annual NELS Summit, participants started the day by traveling to the U.S. Capitol Visitors Center. Upon arrival, the participants attended a panel presentation featuring **Kripa Sreepada, MHA**, Health Care Legislative Assistant, Representative Joe Crowley (D – NY), **Elizabeth Liberman, M.S.**, Health Care Analyst, National Investment Center for Seniors Housing and Care (NIC), and **Dr. Kevin Hansen** on the topics of legislative policy advocacy and the regulatory environment, on both the federal and state levels. Ms. Sreepada, a former NELS participant, discussed the importance of administrator engagement in the legislative



policymaking process, as well as the current initiatives in pending legislation that will affect the senior care industry. Ms. Liberman, also a former NELS participant, spoke about the role that NIC plays in providing data and transparency into the long-term care industry. She then discussed the process for instituting new regulations with federal executive branch agencies, including how individuals within the industry have the ability to stay updated with possible regulations and can share their opinions on the possible implications of new regulations

with legislators. Dr. Hansen concluded by discussing advocacy strategies that NELS attendees could engage in with their respective state legislatures and executive branch agencies.

Following this panel, **Senator Tammy Baldwin (D – WI)** joined the group of participants to speak about her appreciation for the people who choose to work in health and aging services. Sen. Baldwin discussed how her role as a caregiver for her aging grandmother influenced her throughout her career and her work within the U.S. Senate. Sen. Baldwin was part of a team that introduced and passed the RAISE (Recognize, Assist, Include, Support, and Engage) Family Caregivers Act (S. 1028/H.R. 3759) to implement a national strategy to support those in a caregiver role. The RAISE Act was signed into law in January 2018. Sen. Baldwin also emphasized her focus on health policy as a member of the Committee on Health, Education, Labor, and Pensions and the Subcommittee on Labor, Health and Human Services, Education, and Related Agencies (under the Committee on Appropriations). While discussing the 2019 fiscal budget, she discussed her work on the Older Americans Act reauthorization to provide meals on wheels, community centers, intergenerational centers, and other opportunities for isolated adults to stay interactive, as well as have access to health care preventive screenings.⁴



Following the time with Sen. Baldwin, participants attended a panel discussion on “Leadership Across the Continuum of Health and Aging Services,” moderated by **Dr. Doug Olson**. The panelists included **Theresa Forster**, Vice President for Hospice Policy and Programs, National Association for Home Care and Hospice (NAHC); **Randy Lindner, MHA, CAE**, President and CEO, National Association of Long Term Care Administrator Boards (NAB); **Matt Mauthe, CNHA, CALA, FACHCA**, Chief Executive Officer, Marquardt Village; and **Paul Williams, CAE, IOM**, Vice President of Government Relations, Argentum. The panelists began by each providing some context about their organizations, as well as discussing their roles within each organization or association. The first question posed to the panelists by Dr. Olson focused on developing leadership capabilities within and across lines of service in the field of health and aging services, primarily to enhance the skillsets of current and future administrators. Mr. Lindner spoke



about how regulations for an administrator license vary immensely across state lines. He then discussed how NAB has been developing its new Health Services Executive (HSE) qualification for leaders across the continuum of care, including skilled nursing facilities, assisted living centers, and home- and community-based services. The HSE is also geared at improving mobility of licensure across state lines. Ms. Forster voiced support for certifications of key administrator

positions, such as the CEO. She emphasized that one of the hallmarks of a leader is flexibility. Similarly, Mr. Mauthe discussed raising the bar for leadership in long-term care by actively participating in the legislative process and continuing their education and their personal

growth. Lastly, Mr. Williams pointed out that leaders in senior care must know much more than regulations; there are many disciplines and competencies beyond what states require to make a successful leader. Dr. Olson next asked about the future challenges for the administrator position that will impact transitions between lines of service. Ms. Forster discussed the importance of transitions with hospice care. Often, patients are referred to or receive hospice care very late in the process. A potential solution would be to break down the silos of care and to work in conjunction with other care providers to help patients with complex care needs. Mr. Mauthe commented that regulations are moving in the right direction to aid transitions of care and stated the bundled payment model could help residents quite a bit. The next discussion point revolved around the tools, programs, and resources to help the industry move to a better place for leadership in multiple lines of service. Mr. Williams led the discussion by elaborating upon the different credential programs available to professionals in long-term care. He spoke about resources that Argentum has developed for executive directors and families of those in senior living, assisted living, independent living, or memory care settings. Mr. Mauthe also commented on the opportunities available from LeadingAge, such as its “iLead” program at the state level and the Leadership Academy at the national level. He emphasized these programs are essential for all professionals in the building to gain leadership experience, not just the administrator. Also, anecdotally, he noted that many directors and department heads have not received formal leadership training. Mr. Mauthe reminded everyone that while it is important to seek new credentials, it is also important to pace yourself and ensure quality in continuing education. Mr. Lindner concurred and spoke about the obligations professionals have for lifelong learning and to give back to the field, whether that is through speaking at seminars or being involved in professional and provider organizations. To



conclude the panel, Dr. Olson asked the panelists about their future thoughts with respect to leadership across multiple lines of service. Mr. Mauthe began by emphasizing the importance of the long-term care professions; those working in the field are entrusted with the care of vulnerable people by families and the government. Often, the employees are young and have an immense amount of responsibility in their jobs. He discussed how successes in

senior care are a result of team effort, and education can only prepare a person to a certain degree. Networking is unquestionably important for health and aging services leaders. Lastly, he commented on the importance of collaboration within the health care system. Mr. Williams echoed Mr. Mauthe on the necessity of collaboration, and he used Argentum’s Board of Directors as an example, stating there are members from LeadingAge and the National Center on Assisted Living (NCAL) who are members of its board.⁵

After the two morning panel sessions and lunch at the Capitol, Summit participants moved to the National Association of Long Term Care Administrator Boards (NAB) offices to brainstorm ideas to focus on when working on their action plans for Thursday. Mike Muetzel and Dr. Olson led a fast-paced activity where participants quickly listed the challenges and the opportunities facing the field of health and aging services. This activity got participants thinking about potential ideas to narrow down for the action planning to come. Some of the challenges and opportunities generated by attendees included the absence of positive press/media, educating consumers about what to expect for their loved ones, more involvement with local high schools, confidence to contact legislators and regulatory bodies, a communication strategy to improve awareness of careers in health and aging services, mentorship coordination with a more structured program, staffing and retention, and resources to guide new administrators who are starting out in this profession. The participants spent the rest of their time at the NAB offices with Mr. Muetzel and Dr. Hansen discussing the ideas generated through the small group work and thinking of the impact these ideas would have in health and aging services. This cohort of participants decided to primarily focus on resources for emerging professionals in the industry and educating the senior population. After brainstorming, they decided the three action plans for Thursday's session would be recruitment strategies, resources for emerging leaders to contact legislators, and educating consumers in health and aging services.



On the final day of the Summit, participants had the opportunity to attend a panel session, led by **Dr. Kevin Hansen**, featuring representatives from NELS partnering organizations. The panelists provided updates about current leadership development initiatives from each organization and any work conducted to date, based on past NELS recommendations. Panelists included:

- **Susan Hildebrandt**, Vice President of Workforce Initiatives, LeadingAge;
- **Randy Lindner**, President and CEO, National Association of Long Term Care Administrator Boards and the NAB Foundation;
- **Bill McGinley**, President and CEO, American College of Health Care Administrators;
- **Clifton Porter**, Senior Vice President of Government Affairs, American Health Care Association/National Center on Assisted Living; and
- **Brent Weil**, Vice President of Workforce Development, Argentum.



The panel emphasized the importance of joining professional and provider organizations to benefit the field of LTC and to work toward an improved public image. Following the main panel session, participants were divided into smaller groups to have more direct conversations with each of the panelists, focusing on issues mentioned during the main session and any other thoughts or questions participants had. These breakout sessions allowed participants to have direct interaction and networking opportunities with each panelist and provided them the opportunity to gain a perspective on how NELS action plans have influenced partnering organization's decisions and policies, including those on the legislative and regulatory fronts. These sessions also gave participants a sense of how they could work with each of these organizations in the future.

OUTCOMES

Throughout the three days, participants brainstormed concerning several challenges facing health and aging services settings, and focused on those issues most crucial for their final action plans and post-Summit work. On the final day, led by Mr. Muetzel, the large group narrowed down the various categories of initiatives to prioritize three different areas of focus. Participants were then able to choose which focus group to join based on their personal interests. The final



three categories chosen were Recruitment and Retention Strategies, Policymaking, and Educating Consumers. These focus groups were then given time to collaborate and promulgate final action plans to work on during the coming year, with an emphasis on work that could be completed within the six months following the Summit. These action plans included setting deadlines and assigning duties to members of each group to efficiently execute the outlined initiatives. The resulting initiatives included the following:

1. The **Recruitment and Retention Strategies Group** concentrated on keeping up with both current and future staffing demands, workplace culture, salaries and benefits, as well as recruiting and retaining high quality staff. They planned to reach out to CNAs, housekeepers, dietary aids, and others within their care communities to learn why those individuals choose to work in this industry and what makes them stay in this field rather than pursuing other career options. The group also planned to focus their efforts on recruiting individuals not currently working in the long-term care industry by showing them the intrinsic and extrinsic benefits of working in health and aging services. When conducting research, group members found some tools already available on the internet (e.g., Argentum had a video, LeadingAge had a PowerPoint to inform the public on the

opportunities available in senior care). After reviewing these resources, the group decided they wanted to publish a toolkit which would be readily available and easy to access. The “recruitment and retention toolbox” would include recruitment materials (e.g., cards, flyers) to hand out to the public, strategies to engage with staff on workforce development, partnering ideas for educational institutions that can help to advance careers, and collecting existing resources to educate local community members. The goal for participants will be to create a toolbox for their care community and publish it on the NELS website to share with associations (e.g., Argentum, LeadingAge, ACHCA, NAB, AHCA/NCAL) to help meet the current and future demands of staffing in health and aging services and senior living settings.

2. The **Policymaking Group** wanted to educate professionals on how elected officials can help their care settings and administrators themselves in terms of health and aging services policy and regulations. The participants worked to re-think a process to make it easier for people in the workforce to talk to politicians and regulatory officials. The existing legislative and regulatory processes need to be better understood by the general public, so they can provide feedback and input on proposed legislation or regulations. This group wanted to find mediums for communication that administrators in health and aging services are more comfortable using, accessible, and streamlined to advocate for issues in the senior care field. They discussed making a toolkit of different resources for professionals that will aid in advocacy efforts. The group’s plan of action included informing individuals about how to access the Federal Register, leverage connections with NELS partner organizations for national policy initiatives and resources, utilize existing websites, and develop connections with local and state elected officials to help bridge the gap between emerging professionals in health and aging services and policymakers who seek input on proposed legislation or regulations. The overarching goal of the group was to help emerging professionals understand the legislative and regulatory processes, see the direct effect of communicating with representatives and senators, and identify the next steps to create policy for the profession and the industry.



3. The **Educating Consumers Group** chose to focus on educating consumers (and their family members) new to health and aging services concerning the resources and options available when entering a nursing home, assisted living center, or other residential care setting for the first time. These educational resources would be focused on helping residents and families with expectations in health and aging services settings by helping



them understand some of the key issues in dealing with Medicaid, Medicare, and services that can be provided within a particular care community. The goal of the group was to provide more education to new consumers so there are fewer issues later on with an unaware resident or family member (e.g., what Medicaid covers, what the care community can or cannot do). This increased education can aid residents and families in making decisions about matters that can be confusing and complex to those new to health and aging services settings. Group members discussed sharing educational resources utilizing a mode that can be easily distributed to any

care community and in a format that allows an administrator to tailor the information to suit their specific needs and organizational policies and capabilities. These collected and developed resources would also be located on the NELS website, offering partner organizations and future attendees the ability to access and share the information for their use.

At the conclusion of the Summit, each participant was given the opportunity to express the impact NELS had on them and many spoke of the inspirational nature of the Summit and the lasting memories from Summit activities and connections. Participants committed to further involvement in the legislative process, work towards advancing the public image of the health and aging services profession, and implementing their own action plans in the coming months. Many participants felt motivated to create a better profession for themselves and for future generations by developing proactive, innovative solutions that enrich older adults' lives.



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2018 Steering Committee Members:

- **Stephanie Antoun**, Administrator of Health Services, Marjorie P. Lee Retirement Community
- **Dr. Robert Burke**, Professor, Health Services Management and Leadership Department, Milken Institute School of Public Health, The George Washington University
- **Dr. Kevin Hansen**, NELS Director and Assistant Professor, Health Care Administration Program, University of Wisconsin – Eau Claire
- **Susan Hildebrandt**, Vice President of Workforce Initiatives, LeadingAge
- **Jennifer Johnson**, Campus Administrator, Marquardt Village
- **Dr. Keith Knapp**, Associate Professor, Department of Health Services and Senior Living Leadership, Bellarmine University
- **Christy Kramer**, Director, LeadingAge DC
- **Elizabeth Liberman**, Healthcare Analyst, National Investment Center for Seniors Housing and Care
- **Randy Lindner**, President and CEO, National Association of Long Term Care Administrator Boards and the NAB Foundation
- **Bill McGinley**, President and CEO, American College of Health Care Administrators
- **Anne Montgomery**, Deputy Director, Center for Elder Care and Advanced Illness, Altarum
- **Mike Muetzel**, Founder and CEO, Mx Marketing Management Solutions
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- **Brent Weil**, Vice President of Workforce Development, Argentum
- **Dr. David Wolf**, Associate Professor, Health Services Administration, Barry University

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SUMMIT PARTICIPANTS

The following individuals were attendees at the 2018 NELS Summit, representing professionals from a variety of long-term care and health care settings along the continuum of care:

Marivic Alvear, Memory Care Supervisor, The Kensington of Sierra Madre

Madelyn Blaha, undergraduate student, University of Wisconsin – Eau Claire

Carly Cline, Campus Administrator, Lutheran Homes and Health Services of Fond du Lac

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<http://www.achca.org>

⁴ For more information on the health care policy work by Senator Tammy Baldwin (D – WI), please visit: <https://www.baldwin.senate.gov/priorities/health-care-information> .

⁵ Please contact either Dr. Kevin Hansen (hansekev@uwec.edu), NELS Director, or Dr. Douglas Olson (olsondou@uwec.edu), NELS Senior Advisor, for more information on the policy and legislative forum held during the 2018 NELS Summit.